

Pearson Edexcel Level 1 Award, Certificate and Diploma in Retail Skills

Specification

Competence-based qualifications

First registration January 2012

Issue 2

Edexcel, BTEC and LCCI qualifications

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This specification is Issue 2. Key changes are listed in the summary table on the next page. We will inform centres of any changes to this issue. The latest issue can be found on the Pearson website: qualifications.pearson.com

These qualifications were previously known as:

Pearson Edexcel Level 1 Award in Retail Skills (QCF)

Pearson Edexcel Level 1 Certificate in Retail Skills (QCF)

Pearson Edexcel Level 1 Diploma in Retail Skills (QCF)

The QNs remain the same.

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ISBN 9781446953518

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Summary of Pearson Edexcel Level 1 Award, Certificate and Diploma in Retail Skills specification Issue 2 changes

Summary of changes made between previous issue and this current issue	Page number
All references to QCF have been removed throughout the specification	
Definition of TQT added	1
Definition of sizes of qualifications aligned to TQT	2
TQT value added	5, 7 and 14
Guided learning definition updated	25
QCF references removed from unit titles and unit levels in all units	28-306

Earlier issue(s) show(s) previous changes.

If you need further information on these changes or what they mean, contact us via our website at: qualifications.pearson.com/en/support/contact-us.html.

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Introducing Pearson Edexcel NVQ/Competence-based qualifications

What are NVQ/Competence-based qualifications?

National Vocational Qualifications (NVQs)/Competence-based qualifications are work-based qualifications that give learners the opportunity to develop and demonstrate their competence in the area of work or job role to which the qualification relates.

NVQs/Competence-based qualifications are based on recognised occupational standards for the appropriate sector. Occupational standards define what employees, or potential employees, must be able to do and know, and how well they should undertake work tasks and work roles. These standards are written in broad terms to enable employers and providers to apply them to a wide range of related occupational areas.

NVQs/Competence-based qualifications are outcomes-based with no fixed learning programme, therefore allowing flexible delivery to meet the individual learner's needs. At Level 2 and above, these qualifications are recognised as approved training and development courses for employees that have been in the workplace for some time or as a way of inducting, training and developing new entrants into the workplace. Qualifications at Level 1 can be used in Traineeships, which enables progression to entry level employment or to Apprenticeship programmes.

Learners will work towards their qualification in the workplace or in settings that replicate the working environment as specified in the assessment requirements. Colleges, training centres and/or employers can offer these qualifications as long as they have access to appropriate physical and human resources and have the necessary quality assurance systems in place

Sizes of NVQ/Competence-based qualifications

For all regulated qualifications, Pearson specify a total number of hours that is estimated learners will require to complete and show achievement for the qualification – this is the Total Qualification Time (TQT). The TQT value indicates the size of a qualification.

Within the TQT, Pearson identifies the number of Guided Learning Hours (GLH) that we estimate a centre delivering the qualification might provide. Guided learning means activities, such as lessons, tutorials, online instruction, supervised study and giving feedback on performance, that directly involve tutors and assessors in teaching, supervising and invigilating learners. Guided learning includes the time required for learners to complete external assessment under examination or supervised conditions.

In addition to guided learning, other required learning directed by tutors or assessors will include private study, preparation for assessment and undertaking assessment when not under supervision, such as preparatory reading, revision and independent research.

As well as TQT and GLH, qualifications can also have a credit value – equal to one tenth of TQT, rounded to the nearest whole number.

TQT and credit values are assigned after consultation with users of the qualifications.

NVQ/Competence-based qualifications are available in the following sizes:

- Award – a qualification with a TQT value of 120 or less (equivalent to a range of 1–12 credits)
- Certificate – a qualification with a TQT value in the range of 121–369 (equivalent to a range of 13–36 credits)
- Diploma – a qualification with a TQT value of 370 or more (equivalent to 37 credits and above).

Qualification titles covered by this specification

This specification gives you the information you need to offer the Pearson Edexcel Level 1 Award, Certificate and Diploma in Retail Skills:

Qualification title	Qualification Number (QN)	Accreditation start date
Pearson Edexcel Level 1 Award in Retail Skills	600/3844/5	01/01/2012
Pearson Edexcel Level 1 Certificate in Retail Skills	600/3991/7	01/01/2012
Pearson Edexcel Level 1 Diploma in Retail Skills	600/3962/0	01/01/2012

Qualifications eligible and funded for post-16-year-olds can be found on the funding Hub. The Skills Funding Agency also publishes a funding catalogue that lists the qualifications available for 19+ funding.

You should use the Qualification Number (QN), when you wish to seek public funding for your learners. Each unit within a qualification will also have a unique reference number, which is listed in this specification.

The qualification title and unit reference numbers will appear on the learners' final certification document. Learners need to be made aware of this when they are recruited by the centre and registered with Pearson.

Key features of the Pearson Edexcel Level 1 Award, Certificate and Diploma in Retail Skills

These qualifications are:

- nationally recognised
- based on the Retail Skills National Occupational Standards (NOS). The NOS, assessment requirements/strategy and qualification structure(s) are owned by Skillsmart Retail.

What is the purpose of these qualifications?

These qualifications comprises units developed by Skillsmart Retail, the sector skills council for the retail sector. The qualification will allow candidates to apply knowledge, understanding and skills, based on the National Occupational Standards for Retail developed with employers.

Who are these qualifications for?

These qualifications are for all learners aged 14 and above who are capable of reaching the required standards.

Edexcel's policy is that the qualifications should:

- be free from any barriers that restrict access and progression
- ensure equality of opportunity for all wishing to access the qualification(s).

What are the potential job roles for those working towards these qualifications?

- Retail assistant
- Retail merchandiser

What progression opportunities are available to learners who achieve these qualifications?

Learners can progress on to the Pearson Edexcel Level 2 Certificate and Diploma in Retail Skills and/or the Pearson Edexcel BTEC Level 2 Award, Certificate or Diploma in Retail Knowledge.

What is the qualification structure for the Pearson Edexcel Level 1 Award in Retail Skills?

The Total Qualification Time (TQT) for this qualification is 70 hours.

The Guided Learning Hours (GLH) for this qualification is 19.

To complete this qualification, learners must achieve a **minimum of 7 credits**. **All 7 credits** must be achieved at **Level 1**.

A minimum of 7 credits must come from the optional **Level 1** units in **Group A**:

Group A						
Unit number	SSC unit code	Unit title	Unit reference number	Level	Credit	GLH
1	B.01	Move goods and materials manually in a retail environment	F/503/5656	1	3	16
2	B.02	Keep stock at required levels in a retail environment	J/503/5657	1	3	16
8	B.08	Sort donated goods for resale or recycling in a retail environment	D/503/5664	1	3	6
16	B.20	Maintain food safety while working with food in a retail environment	F/503/5673	1	5	11
19	B.29	Load orders for despatch from a retail store to customers	Y/503/5677	1	3	15
27	C.01	Wrap and pack goods for customers in a retail environment	K/503/5683	1	3	18
46	C.44	Provide a counter and takeaway service	L/601/5016	1	3	30

Group A						
52	C.51	Contribute to monitoring and maintaining ease of shopping in a retail sales area	K/503/5716	1	2	8
60	E.01	Recognise and report security risks in a retail environment	F/503/5723	1	4	26
61	E.02	Comply with workplace health and safety requirements in a retail environment	J/503/5724	1	5	28
63	E.04	Keep the non-food retail environment clean and tidy	R/503/5726	1	3	16

What is the qualification structure for the Pearson Edexcel Level 1 Certificate in Retail Skills?

The Total Qualification Time (TQT) for this qualification is 190 hours.

The Guided Learning Hours (GLH) for this qualification is 63.

To complete this qualification, learners must achieve a **minimum of 19 credits**.

A minimum of 19 credits must be achieved at **Level 1 or above**, of which:

- **7 credits** must come from the mandatory unit in **Group A**
- **a minimum of 5 credits** must come from the Level 1 optional units in **Group B**.

The remaining **7 credits** can come either from the **Level 1** units in **Group B** or the **Level 2** units in **Group C**, or both.

Seven credits must come from **Group A**:

Group A						
Unit number	SSC unit code	Unit title	Unit reference number	Level	Credit	GLH
62	E.03	Work effectively in a retail team	L/503/5725	1	7	35

A minimum of 5 credits must come from **Group B**:

Group B						
Unit number	SSC unit code	Unit title	Unit reference number	Level	Credit	GLH
1	B.01	Move goods and materials manually in a retail environment	F/503/5656	1	3	16
2	B.02	Keep stock at required levels in a retail environment	J/503/5657	1	3	16
8	B.08	Sort donated goods for resale or recycling in a retail environment	D/503/5664	1	3	6

Group B						
16	B.20	Maintain food safety while working with food in a retail environment	F/503/5673	1	5	11
19	B.29	Load orders for despatch from a retail store to customers	Y/503/5677	1	3	15
27	C.01	Wrap and pack goods for customers in a retail environment	K/503/5683	1	3	18
46	C.44	Provide a counter and takeaway service	L/601/5016	1	3	30
52	C.51	Contribute to monitoring and maintaining ease of shopping in a retail sales area	K/503/5716	1	2	8
60	E.01	Recognise and report security risks in a retail environment	F/503/5723	1	4	26
61	E.02	Comply with workplace health and safety requirements in a retail environment	J/503/5724	1	5	28
63	E.04	Keep the non-food retail environment clean and tidy	R/503/5726	1	3	16

Group C						
Unit number	SSC unit code	Unit title	Unit reference number	Level	Credit	GLH
3	B.03	Receive goods and materials into storage in a retail environment	R/503/5659	2	4	22
4	B.04	Place goods and materials into storage in a retail environment	J/503/5660	2	4	19
5	B.05	Keep stock on sale at required levels in a retail environment	L/503/5661	2	3	16
6	B.06	Process customer orders for goods in a retail environment	R/503/5662	2	3	19
7	B.07	Process returned goods in a retail environment	Y/503/5663	2	3	18
9	B.09	Assemble products for display in a retail environment	H/503/5665	2	2	9
10	B.11	Hand-process fish in a retail environment	K/503/5666	2	6	21
11	B.12	Process greengrocery products for sale in a retail environment	M/503/5667	2	7	17
14	B.18	Select, weigh and measure bakery ingredients	D/601/4551	2	3	16
15	B.19	Hand-divide, mould and shape fermented dough	T/601/4555	2	4	21
17	B.21	Maintain food safety while working with food in a retail environment	J/503/5674	2	6	13

Group C						
18	B.28	Pick products in a retail environment to fulfil customer orders	R/503/5676	2	4	19
20	B.30	Check stock levels and sort out problems with stock levels in a retail environment	D/503/5678	2	2	10
21	B.31	Maintain moisture levels for crops or plants	R/502/0854	2	2	15
22	B.32	Provide nutrients to crops or plants	L/502/0853	2	2	15
23	B.33	Remove unwanted plant growth to maintain development	Y/502/1214	2	5	38
24	B.34	Identify and report the presence of pests, diseases and disorders	K/502/1511	2	3	23
25	B.35	Finish bake-off food products in a retail environment	H/503/5679	2	3	15
26	B.36	Glaze, coat and decorate bake-off products for sale in a retail environment	Y/503/5680	2	3	15
28	C.02	Display stock to promote sales to customers in a retail environment	M/503/5684	2	5	26
29	C.03	Help customers to choose products in a retail environment	T/503/5685	2	6	20
30	C.04	Carry out promotional campaigns in a retail environment	A/503/5686	2	4	18

Group C						
31	C.05	Deal with customer queries and complaints in a retail environment	F/503/5687	2	4	24
32	C.06	Demonstrate products to customers in a retail environment	J/503/5688	2	3	15
33	C.08	Process payments for purchases in a retail environment	L/503/5689	2	4	17
34	C.09	Process applications for credit agreements offered in a retail environment	F/503/5690	2	5	25
35	C.12	Promote loyalty schemes to customers in a retail environment	J/503/5691	2	3	11
37	C.18	Follow guidelines for planning and preparing visual merchandising displays	D/503/5695	2	5	22
38	C.19	Dress visual merchandising displays to attract customers	H/503/5696	2	7	35
39	C.20	Order and position signage and graphics for visual merchandising displays	K/503/5697	2	3	15
40	C.21	Dismantle and store props and graphics from visual merchandising displays	M/503/5698	2	3	15
42	C.23	Assemble visual merchandising displays	D/503/5700	2	4	20

Group C						
43	C.36	Follow point-of-sale procedures for age-restricted products in a retail environment	J/503/5707	2	2	11
44	C.37	Provide National Lottery products to customers	L/503/5708	2	4	25
45	C.42	Advise customers on the fixing and care of tiles	R/503/5709	2	6	35
47	C.46	Cash up in a retail environment	L/503/5711	2	2	9
48	C.47	Promote a retail store's credit card to customers in a retail environment	R/503/5712	2	3	12
49	C.48	Provide service to customers in a dressing room in a retail environment	Y/503/5713	2	3	16
50	C.49	Promote food or drink products by offering samples to customers	D/503/5714	2	2	13
51	C.50	Deliver goods from a retail environment to the customer's delivery address	H/503/5715	2	3	17
53	C.52	Help customers to apply for a retail store's credit card and associated insurance products	M/503/5717	2	4	22
54	C.54	Help customers to choose delicatessen products in a retail environment	T/503/5718	2	3	15
55	C.55	Portion delicatessen products to meet customer requirements in a retail environment	A/503/5719	2	2	9

Group C						
56	C.56	Merchandise plants and other relevant products	J/502/0771	2	6	45
57	C.59	Demonstrate makeup and skincare products to customers at a beauty counter in a retail environment	T/503/5721	2	4	15
58	C.60	Operate a customer record card system on a beauty counter in a retail environment	A/503/5722	2	2	8
59	D.01	Give customers a positive impression of yourself and your organisation	L/601/0933	2	5	33
64	E.06	Protect own and others' health and safety when working in a retail environment	Y/503/5727	2	5	28
65	E.07	Reduce security risks in a retail environment	D/503/5728	2	5	25
66	E.20	Prepare newspapers and magazines for return to merchandisers	A/503/5736	2	2	10
67	E.22	Check the accuracy of records of hours worked by staff in a retail environment	J/503/5738	2	4	17

What is the qualification structure for the Edexcel Level 1 Diploma in Retail Skills (QCF)?

Individual units can be found in the *Units* section. The QCF level and credit value are given on the first page of each unit.

The Total Qualification Time (TQT) for this qualification is 370 hours.

The Guided Learning Hours (GLH) for this qualification is 130.

To complete this qualification, learners must achieve a **minimum of 37 credits**.

A minimum of 37 credits must be achieved at **Level 1 or above**, of which:

- **7 credits** must come from the mandatory unit in **Group A**;
- **a minimum of 15 credits** must come from the Level 1 units in **Group B**.

The remaining **15 credits** must come from the **Level 1** units in **Group B** and/or the **Level 2** units in **Group C**.

Seven credits must come from **Group A**:

Group A						
Unit number	SSC unit code	Unit title	Unit reference number	Level	Credit	GLH
62	E.03	Work effectively in a retail team	L/503/5725	1	7	35

and

A minimum of 15 credits must come from **Group B**:

Group B						
Unit number	SSC unit code	Unit title	Unit reference number	Level	Credit	GLH
1	B.01	Move goods and materials manually in a retail environment	F/503/5656	1	3	16
2	B.02	Keep stock at required levels in a retail environment	J/503/5657	1	3	16

Group B						
8	B.08	Sort donated goods for resale or recycling in a retail environment	D/503/5664	1	3	6
16	B.20	Maintain food safety while working with food in a retail environment	F/503/5673	1	5	11
19	B.29	Load orders for despatch from a retail store to customers	Y/503/5677	1	3	15
27	C.01	Wrap and pack goods for customers in a retail environment	K/503/5683	1	3	18
46	C.44	Provide a counter and takeaway service	L/601/5016	1	3	30
52	C.51	Contribute to monitoring and maintaining ease of shopping in a retail sales area	K/503/5716	1	2	8
60	E.01	Recognise and report security risks in a retail environment	F/503/5723	1	4	26
61	E.02	Comply with workplace health and safety requirements in a retail environment	J/503/5724	1	5	28
63	E.04	Keep the non-food retail environment clean and tidy	R/503/5726	1	3	16

Group C						
Unit number	SSC unit code	Unit title	Unit reference number	Level	Credit	GLH
3	B.03	Receive goods and materials into storage in a retail environment	R/503/5659	2	4	22
4	B.04	Place goods and materials into storage in a retail environment	J/503/5660	2	4	19
5	B.05	Keep stock on sale at required levels in a retail environment	L/503/5661	2	3	16
6	B.06	Process customer orders for goods in a retail environment	R/503/5662	2	3	19
7	B.07	Process returned goods in a retail environment	Y/503/5663	2	3	18
9	B.09	Assemble products for display in a retail environment	H/503/5665	2	2	9
10	B.11	Hand-process fish in a retail environment	K/503/5666	2	6	21
11	B.12	Process greengrocery products for sale in a retail environment	M/503/5667	2	7	17
12	B.13	Finish meat products by hand in a retail environment	T/503/5668	2	9	29
13	B.17	Organise own work to meet a dough production schedule in a retail environment	A/503/5672	2	10	48
14	B.18	Select, weigh and measure bakery ingredients	D/601/4551	2	3	16
15	B.19	Hand-divide, mould and shape fermented dough	T/601/4555	2	4	21

Group C						
17	B.21	Maintain food safety while working with food in a retail environment	J/503/5674	2	6	13
18	B.28	Pick products in a retail environment to fulfil customer orders	R/503/5676	2	4	19
20	B.30	Check stock levels and sort out problems with stock levels in a retail environment	D/503/5678	2	2	10
21	B.31	Maintain moisture levels for crops or plants	R/502/0854	2	2	15
22	B.32	Provide nutrients to crops or plants	L/502/0853	2	2	15
23	B.33	Remove unwanted plant growth to maintain development	Y/502/1214	2	5	38
24	B.34	Identify and report the presence of pests, diseases and disorders	K/502/1511	2	3	23
25	B.35	Finish bake-off food products in a retail environment	H/503/5679	2	3	15
26	B.36	Glaze, coat and decorate bake-off products for sale in a retail environment	Y/503/5680	2	3	15
28	C.02	Display stock to promote sales to customers in a retail environment	M/503/5684	2	5	26
29	C.03	Help customers to choose products in a retail environment	T/503/5685	2	6	20
30	C.04	Carry out promotional campaigns in a retail environment	A/503/5686	2	4	18

Group C						
31	C.05	Deal with customer queries and complaints in a retail environment	F/503/5687	2	4	24
32	C.06	Demonstrate products to customers in a retail environment	J/503/5688	2	3	15
33	C.08	Process payments for purchases in a retail environment	L/503/5689	2	4	17
34	C.09	Process applications for credit agreements offered in a retail environment	F/503/5690	2	5	25
35	C.12	Promote loyalty schemes to customers in a retail environment	J/503/5691	2	3	11
36	C.17	Provide a bra-fitting service in a retail environment	Y/503/5694	2	10	44
37	C.18	Follow guidelines for planning and preparing visual merchandising displays	D/503/5695	2	5	22
38	C.19	Dress visual merchandising displays to attract customers	H/503/5696	2	7	35
39	C.20	Order and position signage and graphics for visual merchandising displays	K/503/5697	2	3	15
40	C.21	Dismantle and store props and graphics from visual merchandising displays	M/503/5698	2	3	15

Group C						
41	C.22	Make props and decorate fixtures and panels for visual merchandising displays	T/503/5699	2	10	45
42	C.23	Assemble visual merchandising displays	D/503/5700	2	4	20
43	C.36	Follow point-of-sale procedures for age-restricted products in a retail environment	J/503/5707	2	2	11
44	C.37	Provide National Lottery products to customers	L/503/5708	2	4	25
45	C.42	Advise customers on the fixing and care of tiles	R/503/5709	2	6	35
47	C.46	Cash up in a retail environment	L/503/5711	2	2	9
48	C.47	Promote a retail store's credit card to customers in a retail environment	R/503/5712	2	3	12
49	C.48	Provide service to customers in a dressing room in a retail environment	Y/503/5713	2	3	16
50	C.49	Promote food or drink products by offering samples to customers	D/503/5714	2	2	13
51	C.50	Deliver goods from a retail environment to the customer's delivery address	H/503/5715	2	3	17
53	C.52	Help customers to apply for a retail store's credit card and associated insurance products	M/503/5717	2	4	22

Group C						
54	C.54	Help customers to choose delicatessen products in a retail environment	T/503/5718	2	3	15
55	C.55	Portion delicatessen products to meet customer requirements in a retail environment	A/503/5719	2	2	9
56	C.56	Merchandise plants and other relevant products	J/502/0771	2	6	45
57	C.59	Demonstrate makeup and skincare products to customers at a beauty counter in a retail environment	T/503/5721	2	4	15
58	C.60	Operate a customer record card system on a beauty counter in a retail environment	A/503/5722	2	2	8
59	D.01	Give customers a positive impression of yourself and your organisation	L/601/0933	2	5	33
64	E.06	Protect own and others' health and safety when working in a retail environment	Y/503/5727	2	5	28
65	E.07	Reduce security risks in a retail environment	D/503/5728	2	5	25
66	E.20	Prepare newspapers and magazines for return to merchandisers	A/503/5736	2	2	10
67	E.22	Check the accuracy of records of hours worked by staff in a retail environment	J/503/5738	2	4	17

How are the qualifications graded and assessed?

The overall grade for each qualification is a 'pass'. The learner must achieve all the required units within the specified qualification structure.

To pass a unit the learner must:

- achieve **all** the specified learning outcomes
- satisfy **all** the assessment criteria by providing sufficient and valid evidence for each criterion
- show that the evidence is their own.

The qualifications are designed to be assessed:

- in the workplace or
- in conditions resembling the workplace, as specified in the assessment requirements/strategy for the sector, or
- as part of a training programme.

Assessment requirements/strategy

The assessment requirements/strategy for these qualifications have been included in *Annexe C*. They have been developed by Skillsmart Retail in partnership with employers, training providers, awarding organisations and the regulatory authorities. The assessment strategy includes details on:

- the use and application of simulation
- use of simulation as an assessment method
- definition of a Realistic Working Environment (RWE)
- the role of supervisors and managers in the assessment process
- the role of peripatetic and internal verifiers in the assessment process
- the role of expert witnesses in the assessment process
- occupational competence of expert witnesses
- occupational competence of assessors
- occupational competence of verifiers
- continuing professional development of assessors and verifiers
- risk identification
- risk management.

Evidence of competence may come from:

- **current practice** where evidence is generated from a current job role
- a **programme of development** where evidence comes from assessment opportunities built into a learning/training programme whether at or away from the workplace
- the **Recognition of Prior Learning (RPL)** where a learner can demonstrate that they can meet the assessment criteria within a unit through knowledge, understanding or skills they already possess without undertaking a course of learning. They must submit sufficient, reliable and valid evidence for internal and standards verification purposes. RPL is acceptable for accrediting a unit, several units or a whole qualification
- a **combination** of these.

It is important that the evidence is:

Valid	relevant to the standards for which competence is claimed
Authentic	produced by the learner
Current	sufficiently recent to create confidence that the same skill, understanding or knowledge persist at the time of the claim
Reliable	indicates that the learner can consistently perform at this level
Sufficient	fully meets the requirements of the standards.

Types of evidence

To successfully achieve a unit the learner must gather evidence which shows that they have met the required standard in the assessment criteria. Evidence can take a variety of different forms including the examples below. Centres should refer to the assessment strategy for information about which of the following are permissible.

- direct observation of the learner's performance by their assessor (O)
- outcomes from oral or written questioning (Q&A)
- products of the learner's work (P)
- personal statements and/or reflective accounts (RA)
- outcomes from simulation, where permitted by the assessment strategy (S)
- professional discussion (PD)
- assignment, project/case studies (A)
- authentic statements/witness testimony (WT)
- expert witness testimony (EWT)
- evidence of Recognition of Prior Learning (RPL).

The abbreviations may be used for cross-referencing purposes.

Learners can use one piece of evidence to prove their knowledge, skills and understanding across different assessment criteria and/or across different units. It is, therefore, not necessary for learners to have each assessment criterion assessed separately. Learners should be encouraged to reference the assessment criteria to which the evidence relates.

Evidence must be made available to the assessor, internal verifier and Pearson standards verifier. A range of recording documents is available on the Pearson website qualifications.pearson.com. Alternatively, centres may develop their own.

Centre recognition and approval

Centre recognition

Centres that have not previously offered Pearson qualifications need to apply for and be granted centre recognition as part of the process for approval to offer individual qualifications. New centres must complete both a centre recognition approval application and a qualification approval application.

Existing centres will be given 'automatic approval' for a new qualification if they are already approved for a qualification that is being replaced by the new qualification and the conditions for automatic approval are met. Centres already holding Pearson approval are able to gain qualification approval for a different level or different sector via Edexcel online.

Approvals agreement

All centres are required to enter into an approvals agreement which is a formal commitment by the head or principal of a centre to meet all the requirements of the specification and any linked codes or regulations. Pearson will act to protect the integrity of the awarding of qualifications, if centres do not comply with the agreement. This could result in the suspension of certification or withdrawal of approval.

Quality assurance

Detailed information on Pearson's quality assurance processes is given in *Annexe A*.

What resources are required?

Each qualification is designed to support learners working in the retail sector. Physical resources need to support the delivery of the qualifications and the assessment of the learning outcomes and must be of industry standard. Centres must meet any specific resource requirements outlined in *Annexe C: Assessment requirements/strategy*. Staff assessing the learner must meet the requirements within the overarching assessment strategy for the sector.

Unit format

Each unit in this specification contains the following sections.

Unit title:					This is the formal title of the unit that will appear on the learners certificate
Unit reference number:					This code is a unique reference number for the unit.
Level:					All units and qualifications have a level assigned to them. The level assigned is informed by the level descriptors by Ofqual, the qualifications regulator.
Credit value:					All units have a credit value. The minimum credit value is one, and credits can only be awarded in whole numbers. Learners will be awarded credits when they achieve the unit.
Guided learning hours:					Guided Learning Hours (GLH) is the number of hours that a centre delivering the qualification needs to provide. Guided learning means activities that directly or immediately involve tutors and assessors in teaching, supervising, and invigilating learners, for example lectures, tutorials, online instruction and supervised study.
Unit summary:					This provides a summary of the purpose of the unit.
Assessment requirements/evidence requirements:					The assessment/evidence requirements are determined by the SSC. Learners must provide evidence for each of the requirements stated in this section.
Recording of evidence:					Details how evidence can be recorded.
Learning outcomes:	Assessment criteria:	Evidence type:	Portfolio reference:	Date:	
			The learner should use this box to indicate where the evidence can be obtained eg portfolio page number.	The learner should give the date when the evidence has been provided.	
Learning outcomes state exactly what a learner should know, understand or be able to do as a result of completing a unit.		The assessment criteria of a unit specify the standard a learner is expected to meet to demonstrate that a learning outcome, or a set of learning outcomes, has been achieved.		Learners must reference the type of evidence they have and where it is available for quality assurance purposes. The learner can enter the relevant key and a reference. Alternatively, the learner and/or centre can devise their own referencing system.	

Units

Unit 1: Move goods and materials manually in a retail environment

Unit reference number: F/503/5656

Level: 1

Credit value: 3

Guided learning hours: 16

Unit summary

This unit assesses the occupational competence of individuals working in a retail environment whose duties include working under supervision to move and place goods and materials. The unit does not require the learner to use a lift truck, but the learner does need to be able to use other types of handling equipment safely.

Assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

Simulation is allowed for the performance evidence within this unit only if no opportunities exist to gather workplace evidence.

Skillsmart Retail's Assessment Principles for Retail Qualifications can be found on their website (www.skillsmartretail.com).

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Be able to move goods and materials manually in a retail environment	<p>1.1 Perform checks to ensure that equipment needed to move goods and materials is available and in working order</p> <p>1.2 State what can go wrong with the equipment used for moving goods and materials</p> <p>1.3 Move and handle goods and materials safely and in line with organisational procedures</p> <p>1.4 Place goods and materials:</p> <ul style="list-style-type: none"> • in the specified places • within the time allowed • in such a way that they can be easily identified and reached 			
2	Know the importance of rotating stock when putting new stock into storage	2.1 State the importance of rotating stock when putting new stock into storage			
3	Know what support is available to resolve problems with moving goods and materials manually	<p>3.1 Identify the person to whom to report faulty equipment</p> <p>3.2 Identify the people who can help to move goods and materials when necessary</p> <p>3.3 Identify the person who can be asked for advice about where to place goods and materials</p>			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 2: Keep stock at required levels in a retail environment

Unit reference number: J/503/5657

Level: 1

Credit value: 3

Guided learning hours: 16

Unit summary

This unit assesses the occupational competence of people who work in a retail environment and who are responsible for checking stock levels and replenishing the levels of stock on the shelves.

Assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

Simulation is allowed for the performance evidence within this unit only if no opportunities exist to gather workplace evidence.

Skillsmart Retail's Assessment Principles for Retail Qualifications can be found on their website (www.skillsmartretail.com).

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Know the importance of checking stock levels	1.1 State the importance of accurate and up-to-date stock checks and records 1.2 State the importance of following instructions and procedures for checking stock levels			
2	Know the importance of rotating stock when putting new stock on display	2.1 Outline the importance of rotating stock when putting new stock on display			
3	Know the risks involved in handling stock	3.1 Outline potential safety risks involved in handling stock 3.2 Outline how stock, premises and equipment can be damaged by poor stock handling 3.3 State why the work area needs to be cleaned and tidied promptly after replenishing stock levels			
4	Be able to check stock levels in a retail environment	4.1 Perform checks on existing stock levels in such a way that: <ul style="list-style-type: none"> • an accurate count of stock is achieved • instructions and organisational procedures are followed • unsaleable stock is identified • other people are not disturbed except when necessary 			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	<p>4.2 Identify the person who can provide advice when instructions for checking stock are not clear</p> <p>4.3 Identify the person who needs to be told about any unsaleable stock identified</p> <p>4.4 Update stock records accurately and in line with organisational procedures</p>			
<p>5 Be able to position stock in a retail environment</p>	<p>5.1 Position stock in the right places according to instructions relating to:</p> <ul style="list-style-type: none"> • stock rotation • display requirements <p>5.2 Identify the person who can provide advice when instructions for positioning stock are not clear</p> <p>5.3 Handle stock in ways that:</p> <ul style="list-style-type: none"> • protect own and other people's safety • protect stock, equipment and premises from being damaged • do not disturb other people except when necessary <p>5.4 Clean and tidy the work area after replenishing stock levels in line with organisational procedures</p>			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 3: Receive goods and materials into storage in a retail environment

Unit reference number: R/503/5659

Level: 2

Credit value: 4

Guided learning hours: 22

Unit summary

This unit assesses the occupational competence of individuals who are responsible for receiving deliveries of goods and materials in a retail environment.

Assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

Simulation is not allowed for any performance evidence within this unit.

Skillsmart Retail's Assessment Principles for Retail Qualifications can be found on their website (www.skillsmartretail.com).

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Understand the importance of preparing for expected deliveries	<p>1.1 Explain why it is necessary to prepare thoroughly to receive deliveries</p> <p>1.2 Explain why any shortage of storage space needs to be reported promptly</p> <p>1.3 Explain why accurate, complete and up-to-date records are needed for deliveries</p> <p>1.4 Explain how adequate preparation helps to ensure that the health and safety requirements relating to deliveries are met</p>			
2	Understand own responsibility for handling goods and materials	<p>2.1 Explain the importance of handling goods and materials safely, hygienically and in ways that protect them from damage</p>			
3	Be able to prepare to receive deliveries in a retail environment	<p>3.1 Identify:</p> <ul style="list-style-type: none"> the quantity of the items expected the nature of the items expected the storage space needed <p>3.2 Perform checks to ensure that enough storage space is available for expected deliveries</p> <p>3.3 Identify the person to report any shortage of storage space to</p> <p>3.4 Perform checks to ensure that the receiving area is clean, tidy and free from obstructions and hazards</p>			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
		3.5 Perform checks to ensure that the necessary handling equipment is available and is in good working order			
		3.6 Perform checks to ensure that the relevant records are complete, accurate and up to date			
4	Be able to receive deliveries into storage in a retail environment	4.1 Perform checks to ensure that the type, quantity and quality of items delivered are acceptable 4.2 Describe how to refuse faulty deliveries, including how to record these and who needs to know about them 4.3 Use methods that are safe, hygienic and protect the items from damage to check deliveries 4.4 Allow deliveries to be off-loaded only into the designated areas 4.5 Update stock control systems in line with organisational procedures 4.6 Follow legal and organisational requirements for maintaining security and safety while receiving deliveries			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 4: Place goods and materials into storage in a retail environment

Unit reference number: J/503/5660

Level: 2

Credit value: 4

Guided learning hours: 19

Unit summary

This unit assesses the occupational competence of individuals working in a retail environment who are responsible for moving goods and materials into storage. This includes checking beforehand that the available storage facilities are suitable, and making efficient use of the available space.

Assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

Simulation is not allowed for any performance evidence within this unit.

Skillsmart Retail's Assessment Principles for Retail Qualifications can be found on their website (www.skillsmartretail.com).

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Understand the requirements for storing goods and materials in a retail environment	1.1 Explain what might cause the goods and materials to deteriorate in storage 1.2 Describe the types of storage facilities and storage conditions that are needed for the goods and materials 1.3 Outline the legal and organisational requirements for storing goods and materials safely and securely 1.4 Explain why stock needs to be rotated in storage			
2	Know procedures for resolving problems with storage facilities and equipment	2.1 Describe the procedures for reporting any lack of suitable storage facilities 2.2 Describe how to fix faulty equipment when this falls within own responsibility 2.3 Describe the procedures for reporting equipment faults that are not within own responsibility to fix			
3	Be able to place goods and materials into storage in a retail environment	3.1 Perform checks to ensure that adequate storage facilities are available 3.2 Perform checks to ensure that handling equipment is in working order			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	3.3 Place goods and materials: <ul style="list-style-type: none"> • safely and securely • in the designated storage facilities • within the time allowed • in ways that make efficient use of the available storage space • in ways that enable items to be reached easily when needed 3.4 Complete relevant records in line with organisational procedures			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 5: Keep stock on sale at required levels in a retail environment

Unit reference number: L/503/5661

Level: 2

Credit value: 3

Guided learning hours: 16

Unit summary

This unit assesses the occupational competence of people who work in a retail environment and who are responsible for maintaining stock levels to meet changing demand.

Assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

Simulation is not allowed for any performance evidence within this unit.

Skillsmart Retail's Assessment Principles for Retail Qualifications can be found on their website (www.skillsmartretail.com).

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Understand the relationship between stock levels and demand for stock	1.1 Explain the importance of having enough stock in the store to meet demand 1.2 Describe the factors that can affect demand for stock			
2	Understand the relationship between stock levels and the quality of stock on sale	2.1 Explain how stock rotation reduces the risk that stock will become unsaleable 2.2 Describe the signs that stock is no longer saleable			
3	Be able to check the level of stock on sale in a retail environment	3.1 Calculate when to check stock levels, taking into account: <ul style="list-style-type: none"> • expected demand for stock • the time needed to order replacement stock 3.2 Use the organisation's stock control system to assess: <ul style="list-style-type: none"> • current stock levels • the stock levels needed • any shortfalls in stock 3.3 Describe the procedures for informing colleagues that stock needs replacing			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
4	Be able to replenish stock on sale in a retail environment	<p>4.1 Order stock as needed to maintain required levels</p> <p>4.2 Prepare stock for sale within the time allowed</p> <p>4.3 Arrange for stock to be moved to the sales floor as needed</p> <p>4.4 Rotate stock:</p> <ul style="list-style-type: none"> • in accordance with organisational procedures • with the least possible disturbance to other people <p>4.5 Dispose of packaging waste in accordance with organisational procedures</p> <p>4.6 Update the stock control system in line with organisational procedures to reflect:</p> <ul style="list-style-type: none"> • stock movements • any disposal of unsaleable stock <p>4.7 Calculate expected changes in demand and the corresponding changes that need to be made to stock levels</p>			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 6: Process customer orders for goods in a retail environment

Unit reference number: R/503/5662

Level: 2

Credit value: 3

Guided learning hours: 19

Unit summary

This unit assesses the occupational competence of individuals responsible for processing customer orders in a retail environment.

Assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

Simulation is not allowed for any performance evidence within this unit.

Skillsmart Retail's Assessment Principles for Retail Qualifications can be found on their website (www.skillsmartretail.com).

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Understand the importance of customer service in relation to processing customers' orders	<p>1.1 Explain the importance of giving customers clear, accurate and complete information about the terms of supply</p> <p>1.2 Explain the importance of keeping customers informed of the progress of their orders</p>			
2	Understand the correct use of customer information in relation to processing customers' orders	<p>2.1 Describe the information that must be obtained from customers when they place orders</p> <p>2.2 Explain why information is needed from customers when they place orders, including any information that is required by law</p> <p>2.3 Outline the legal and organisational requirements relating to customer confidentiality</p> <p>2.4 Explain the consequences of not keeping customer information confidential</p>			
3	Be able to find out what customers want to order	<p>3.1 Ask questions to clarify customers' requirements</p> <p>3.2 Use product information to help customers who are unsure which exact products will best meet their requirements</p>			
4	Be able to check the availability of the goods customers want to order	<p>4.1 Describe the available sources of supply</p> <p>4.2 Check the availability of goods and the terms and conditions of supply</p> <p>4.3 Offer alternative options to customers if the required goods are not currently in stock</p>			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
5	Be able to process orders for customers	5.1 Check customer identity and credit status in accordance with legal and organisational procedures			
		5.2 Prepare accurate and complete orders using the organisation's required format			
		5.3 Communicate orders to those responsible for fulfilling them in line with organisational procedures			
		5.4 Maintain the requisite level of confidentiality when storing, using and sharing customer information			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 7: Process returned goods in a retail environment

Unit reference number: Y/503/5663

Level: 2

Credit value: 3

Guided learning hours: 18

Unit summary

This unit assesses the occupational competence of individuals who process goods returned by customers. The unit is suitable for learners who work on the shop floor and deal with customers face to face, as well as for learners in behind-the-scenes roles, for example dealing with customers by telephone or email.

Assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

Simulation is not allowed for any performance evidence within this unit.

AC 1.3: If the organisation does not have a written policy, learners need to ask their manager for broad guidelines and follow these where the unit refers to a policy.

ACs 3.1, 3.4: 'Politely' means demonstrating respect and consideration for other people through the use of appropriate body language, verbal language, tone of voice (or the sign language equivalent) and facial expressions.

ACs 2.1, 4.6: In stores where the POS system automatically updates the stock control system, references to updating the stock control system in ACs 2.1 and 4.6 should be interpreted as meaning scanning the returned goods at the POS in such a way that the stock control system is updated.

Skillsmart Retail's Assessment Principles for Retail Qualifications can be found on their website (www.skillsmartretail.com)

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Know about rights and responsibilities in relation to returned goods	1.1 Describe reasons customers might have for returning goods			
		1.2 Describe customers' legal rights to replacements and refunds			
		1.3 Describe the organisation's policy concerning replacements and refunds, including proof of purchase and any charges that apply when the organisation is not at fault			
		1.4 Describe the options available to customers who need to return unwanted goods, including any action customers need to take in connection with each option			
2	Understand the importance of stock control systems	2.1 Explain the importance of updating stock control systems when returns are made			
3	Be able to help retail customers who need to return goods	3.1 Ask customers politely why they want to return goods, when it is necessary to ascertain the reason			
		3.2 Apologise if the organisation appears to be at fault			
		3.3 Offer customers replacements and refunds in accordance with legal and organisational requirements			
		3.4 Describe politely to customers any action that will be taken concerning the goods they have returned, including any charges that apply			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
4	Be able to process returned goods	4.1	Classify returned goods according to their type and condition		
		4.2	Separate unsaleable goods from stock that is to be returned to the sales floor		
		4.3	Label accurately any goods that are to be returned to the supplier or manufacturer		
		4.4	Move returned goods to the correct places ready for despatch, disposal or resale		
		4.5	Communicate accurate and complete information to those responsible for raising a credit note or refunding the payment		
		4.6	Update the stock control system in line with organisational procedures when goods are returned		

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 8: Sort donated goods for resale or recycling in a retail environment

Unit reference number: D/503/5664

Level: 1

Credit value: 3

Guided learning hours: 6

Unit summary

This unit assesses the occupational competence of individuals who work in charity shops and are responsible for processing donated goods of a straightforward type.

Assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

Simulation is not allowed for any performance evidence within this unit.

Skillsmart Retail's Assessment Principles for Retail Qualifications can be found on their website (www.skillsmartretail.com).

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Know how to sort donated goods safely	1.1 Outline the organisational safety requirements that apply to sorting donated goods			
2	Be able to sort donated goods for selling or recycling	2.1 Clean and tidy the work area before starting to sort goods 2.2 Sort donated goods by type and condition 2.3 Identify the person who can help with recognising and classifying unusual items 2.4 Place goods suitable for recycling in the designated containers 2.5 Follow organisational procedures for disposing of items that are not suitable for either selling or recycling 2.6 Place containers in the designated location ready for collection 2.7 Follow organisational requirements for protecting own health and safety when processing donated goods 2.8 Clean and tidy the work area after sorting goods			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 9: Assemble products for display in a retail environment

Unit reference number: H/503/5665

Level: 2

Credit value: 2

Guided learning hours: 9

Unit summary

This unit assesses the occupational competence of individuals who assemble products under supervision for display in a retail environment.

Assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

Simulation is not allowed for any performance evidence within this unit.

Skillsmart Retail's Assessment Principles for Retail Qualifications can be found on their website (www.skillsmartretail.com).

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Be able to assemble products for display in a retail environment	1.1 Perform checks to ensure that all expected items and parts of the product are in the package, before starting to assemble them 1.2 Dispose of all waste safely, including unwanted packaging 1.3 Select tools that are suited to the task of assembling particular products 1.4 Assemble products: <ul style="list-style-type: none"> • in accordance with the manufacturer's instructions • using safe working methods 1.5 Assess assembled products to ensure that: <ul style="list-style-type: none"> • they are in a safe condition • they match any illustrations or other specifications provided by the manufacturer 1.6 Identify the person who can provide advice if products are proving difficult to assemble			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 10: Hand-process fish in a retail environment

Unit reference number: K/503/5666

Level: 2

Credit value: 6

Guided learning hours: 21

Unit summary

This unit assesses the occupational competence of individuals who hand-process fish in a retail environment.

Assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

Simulation is not allowed for any performance evidence within this unit.

If the assessor is unable to make judgements about the specialist skills and knowledge covered by this unit, expert witness testimony must be sought from a person with suitable current experience, to confirm the candidate's competence.

For the purposes of this unit, 'processing' means:

- skinning, heading, scaling, gutting, boning, portioning and steaking **either** flat **or** round fish
- filleting **both** a flat **and** a round fish.

AC 1.2: If the organisation does not have a written policy, learners need to ask their manager for broad guidelines and follow these where the unit refers to a policy.

Skillsmart Retail's Assessment Principles for Retail Qualifications can be found on their website (www.skillsmartretail.com).

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Understand safe working practices in relation to hand-processing fish	1.1			
		1.2			
		1.3			
		1.4			
		1.5			
		1.6			
		1.7			
		1.8			
2	Understand the relationship between the anatomy of fish and the way fish are hand-processed	2.1			
		2.2			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
3	Be able to hand-process fish	<p>3.1 Perform checks to ensure that the fish to be prepared is of saleable quality</p> <p>3.2 Hand-process fish in ways that attempt to:</p> <ul style="list-style-type: none"> • achieve organisational specifications for yield and quality • minimise waste • keep fish in a saleable condition throughout processing • maintain own and other people's health and safety <p>3.3 Place processed products that meet organisational specifications into containers that will keep them in a saleable condition</p>			
4	Be able to maintain own work area in a condition fit for hand-processing fish	<p>4.1 Organise own work area, equipment and tools to enable fish to be hand-processed safely, hygienically and efficiently</p> <p>4.2 Maintain hygienic working conditions when handling fish</p> <p>4.3 Dispose of waste from the hand-processing of fish in ways that meet legal and organisational requirements</p> <p>4.4 Clean and tidy own work area, tools and equipment after hand-processing fish, in accordance with the organisation's cleaning schedule</p>			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 11: Process greengrocery products for sale in a retail environment

Unit reference number: M/503/5667

Level: 2

Credit value: 7

Guided learning hours: 17

Unit summary

This unit assesses the occupational competence of individuals who are responsible for processing greengrocery products for display in a retail environment.

Assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

Simulation is not allowed for any performance evidence within this unit.

If the assessor is unable to make judgements about the specialist skills and knowledge covered by this unit, expert witness testimony must be sought from a person with suitable current experience, to confirm the learners' competence.

Greengrocery products are to include **all** of the following:

- vegetables
- fruit
- salad.

Skillsmart Retail's Assessment Principles for Retail Qualifications can be found on their website (www.skillsmartretail.com).

Recording of evidence

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Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Be able to prepare greengrocery products for sale	1.1 Explain the importance of keeping greengrocery products in a hygienic condition when preparing them for sale			
		1.2 Explain the importance of protecting greengrocery products from damage when preparing them for sale			
		1.3 Handle greengrocery products: <ul style="list-style-type: none"> hygienically in ways that protect them from damage 			
		1.4 Remove unwanted packaging from greengrocery products			
		1.5 Remove unwanted parts of greengrocery products to make products as attractive as possible to customers			
		1.6 Deal with any greengrocery products that do not meet the organisation's quality standards, in line with organisational procedures			
		1.7 Weigh greengrocery products accurately, when weighing is required			
		1.8 Sort greengrocery products according to type and quality			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
		1.9 Package greengrocery products in line with organisational requirements for presentation 1.10 Place unwanted packaging and waste from greengrocery products in the designated places for recycling			
2	Be able to replenish displays of greengrocery products	2.1 Perform checks to ensure that the designated display areas for greengrocery products are clean before replenishing them with stock 2.2 Arrange greengrocery products: <ul style="list-style-type: none"> • in the designated display area for each product • in ways that will attempt to attract customers to buy them 2.3 Perform checks to ensure that the ticketing and coding of greengrocery products contain accurate information about products and prices			
3	Be able to maintain the quality of greengrocery products on display	3.1 Carry out regular checks of the quality and shelf life of greengrocery products on display 3.2 Place greengrocery products in the designated places for recycling when they have little or no shelf life or have deteriorated in quality 3.3 Rotate the stock of greengrocery items according to the shelf life of those items			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 12: Finish meat products by hand in a retail environment

Unit reference number: T/503/5668

Level: 2

Credit value: 9

Guided learning hours: 29

Unit summary

This unit assesses the occupational competence of individuals who finish meat products by hand in a retail environment.

Assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

Simulation is not allowed for any performance evidence within this unit.

If the assessor is unable to make judgements about the specialist skills and knowledge covered by this unit, expert witness testimony must be sought from a person with suitable current experience, to confirm the candidate's competence.

Finishing is to include **both** meat **and** poultry.

Skillsmart Retail's Assessment Principles for Retail Qualifications can be found on their website (www.skillsmartretail.com).

Recording of evidence

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Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Be able to check the suitability of meat products for finishing in a retail environment	<p>1.1 Perform checks to ensure that the meat products to be processed meet the organisation's quality specifications</p> <p>1.2 State reasons for rejecting meat products at the checking stage</p> <p>1.3 Deal with meat products rejected during the checking process:</p> <ul style="list-style-type: none"> • safely • hygienically, including keeping them separate from other meat products <p>1.4 Keep meat products at the specified temperatures during handling, transfer and storage</p> <p>1.5 Explain why meat should be held at the specified temperatures</p> <p>1.6 Keep records of the checking process, in line with organisational procedures</p>			
2	Be able to organise own work area and equipment for finishing meat products in a retail environment	<p>2.1 Organise own work area to meet organisational requirements for:</p> <ul style="list-style-type: none"> • health and safety • food safety • finishing meat products as instructed <p>2.2 Select hand tools that are suited to specific meat finishing tasks</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	<p>2.3 State potential dangers associated with particular tools and equipment</p> <p>2.4 Prepare meat finishing tools and equipment in line with organisational safety and processing requirements</p> <p>2.5 Deal with faulty meat finishing tools and equipment in line with organisational procedures</p> <p>2.6 Clean meat finishing tools and equipment after use in line with organisational safety and processing requirements</p> <p>2.7 Store meat finishing tools and equipment after cleaning in the designated places</p>			
<p>3 Be able to achieve meat product yield and finish in a retail environment</p>	<p>3.1 Organise own meat finishing work in line with organisational finishing instructions</p> <p>3.2 Finish meat products:</p> <ul style="list-style-type: none"> • within the time allowed • achieving the organisational specification for the finished product • achieving the product yield required <p>3.3 Deal with meat products rejected from the finishing process in line with organisational procedures</p> <p>3.4 Store finished products in line with organisational procedures</p>			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 13: Organise own work to meet a dough production schedule in a retail environment

Unit reference number: A/503/5672

Level: 2

Credit value: 10

Guided learning hours: 48

Unit summary

This unit assesses the occupational competence of individuals who process dough within a dough production schedule, in a retail environment.

The type of dough the learner works with may be fermented or non-fermented. Common types of fermented dough include those used for bread, plain and fruited buns, Danish pastries and croissants. Common types of non-fermented dough include those used for sweet and savoury products, puff pastry, scones and biscuits.

Assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

Simulation is not allowed for any performance evidence within this unit.

If the assessor is unable to make judgements about the specialist skills and knowledge covered by this unit, expert witness testimony must be sought from a person with suitable current experience, to confirm the learners' competence.

Skillsmart Retail's Assessment Principles for Retail Qualifications can be found on their website (www.skillsmartretail.com).

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Understand the importance of maintaining health and safety and food safety during dough production	1.1 Explain the importance of following organisational requirements that apply to own work within the dough production schedule for: <ul style="list-style-type: none"> • health and safety • food safety 			
2	Understand why efficient and effective dough production is important to the organisation and its customers	2.1 Explain why efficient and effective dough production is important to the organisation and its customers			
3	Be able to organise own work to meet a dough production schedule in a retail environment	3.1 Organise own work within the dough production schedule in ways that: <ul style="list-style-type: none"> • are within the limits of own authority and responsibility • comply with relevant organisational health and safety and food safety requirements • attempt to make efficient use of the available resources including own time • meet changing dough production needs as they arise • avoid delays that result in dough no longer being in the required condition 			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	3.2 Identify the designated people who can provide advice: <ul style="list-style-type: none"> • when the resources available for dough processing fall short of the quantity or quality required • when the dough production schedule does not seem to be realistically achievable 			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 14: Select, weigh and measure bakery ingredients

Unit reference number: D/601/4551

Level: 2

Credit value: 3

Guided learning hours: 16

Unit summary

This unit comes from the food and drink manufacturing sector. It is included as an option within the retail skills qualifications for learners who work in supermarket in-store bakeries.

Assessment requirements/evidence requirements

The following assessment guidance is provided by Improve, the unit owner:

This unit is designed to assess the skills of learners in the workplace, selecting, weighing and measuring bakery ingredients. It needs to be assessed on the job. The learner must be able to demonstrate their competent performance consistently over a period of time, to meet all of the assessment criteria. This will be achieved by at least two observations of performance in the workplace, and may be supported by witness testimony and other workplace evidence. Observations must ensure that the learner's working practice is at commercial speed and in compliance with standard operating procedures.

The Improve Assessment Strategy for Proficiency qualifications in Food and Drink sets out the overarching assessment requirements.

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Check quantities of ingredients	1.1 Identify the specified ingredients			
		1.2 Check quantities against instructions and specifications			
		1.3 Calculate quantities of ingredients required for production			
2	Select ingredients	2.1 Select ingredients to meet production needs			
		2.2 Check condition, quantity and quality of ingredients			
		2.3 Isolate sub-standard ingredients			
		2.4 Report sub-standard ingredients to the relevant people			
		2.5 Take action to source and identify alternatives, if ingredients are not available			
		2.6 Store ingredients according to specified procedures ready for further processing			
3	Weigh and measure ingredients	3.1 Check ingredients against instructions and specifications			
		3.2 Check accuracy of bakery weighing and measuring equipment			
		3.3 Weigh and measure ingredients, avoiding contamination			
		3.4 Store weighed and measured ingredients in the specified conditions, ready for further processing			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	3.5 Label storage containers or mixing bowls, ready for further processing 3.6 Operate within the limits of own authority and capabilities			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 15: Hand-divide, mould and shape fermented dough

Unit reference number: T/601/4555

Level: 2

Credit value: 4

Guided learning hours: 21

Unit summary

This unit comes from the food and drink manufacturing sector. It is included as an option within the retail skills qualifications for learners who work in supermarket in-store bakeries.

Assessment requirements/evidence requirements

The following assessment guidance is provided by Improve, the unit owner:

This unit is designed to assess the skills of learners in the workplace, hand-dividing, moulding and shaping fermented dough. It needs to be assessed on the job. The learner must be able to demonstrate their competent performance consistently over a period of time, to meet all of the assessment criteria. This will be achieved by at least two observations of performance in the workplace, and may be supported by witness testimony and other workplace evidence. Observations must ensure that the learner's working practice is at commercial speed and in compliance with standard operating procedures.

The Improve Assessment Strategy for Proficiency Qualifications in Food and Drink sets out the overarching assessment requirements.

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Hand-divide fermented dough to specifications and instructions	1.1			
		1.2			
		1.3			
		1.4			
		1.5			
		1.6			
2	Hand-mould and shape fermented dough	2.1			
		2.2			
		2.3			
		2.4			
		2.5			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	2.6 Minimise waste and deal with scrap material 2.7 Place dough in the specified condition and location for further processing 2.8 Operate within the limits of own authority and capabilities			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 16: Maintain food safety while working with food in a retail environment

Unit reference number: F/503/5673

Level: 1

Credit value: 5

Guided learning hours: 11

Unit summary

This unit assesses the occupational competence of individuals who work in a retail environment, and whose work involves any of these activities:

- handling wrapped food
- handling unwrapped food not subject to temperature control requirements (for example, fresh produce or bakery items)
- going into an area where food is prepared even if the learner does not handle the food (for example, if they clean the food preparation area).

This unit covers the individual's responsibilities for contributing to food safety in these circumstances.

Assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

Simulation is not allowed for any performance evidence within this unit.

If the assessor is unable to make judgements about the specialist skills and knowledge covered by this unit, expert witness testimony must be sought from a person with suitable current experience, to confirm the candidate's competence.

The terms highlighted in bold in the assessment criteria are explained in a glossary appended to this unit.

Skillsmart Retail's Assessment Principles for Retail Qualifications can be found on their website (www.skillsmartretail.com).

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Glossary for unit B.20

Accessories	Additional items apart from clothing and jewellery, for example, false nails.
Indicators of potential food safety hazards	<p>Things which could make food unsatisfactory for consumers, for example:</p> <ul style="list-style-type: none">• damaged packaging• spillage into another food• out of date stock• food not stored where it should be (for example, if customers have moved food)• chiller cabinets or freezers that are not operating at the specified temperature• ovens or hot hold cabinets that are not operating at the specified temperature• use of the same utensils to handle different foods• food waste which needs disposing of• dirt• evidence of pests such as rodents or insects.
Protective clothing	<p>Clothing the organisation provides for the learner, which could include:</p> <ul style="list-style-type: none">• trousers• tops such as jackets or tabards• coats• disposable gloves• headgear such as caps or hairnets• aprons.

Right person to report to	This could be the learner's supervisor or manager.
Right times to wash hands	<p>Right times to wash hands would include:</p> <ul style="list-style-type: none"> • after going to the toilet • before going into food production areas including after any work breaks • after leaving food production areas • after disposing of waste • after cleaning • before and after changing dressing or touching an open wound.
Safe behaviour	<p>The opposite of unsafe behaviour. Safe behaviour includes:</p> <ul style="list-style-type: none"> • not touching own face, nose or mouth • not smoking • not chewing gum • not eating • not scratching • not coughing or sneezing.
Unsafe behaviour	<p>Behaviour which can make food unsafe for customers, including:</p> <ul style="list-style-type: none"> • touching own face, nose or mouth • smoking • chewing gum • eating • scratching • coughing or sneezing.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Know how own personal hygiene and behaviour contribute to food safety in a retail environment	<p>1.1 Outline how clean hair, skin, nails and clothing contribute to food safety</p> <p>1.2 State how jewellery and other accessories can put food safety at risk</p> <p>1.3 State why unsafe behaviour must be avoided when working with or near food</p> <p>1.4 State why any open wounds, skin infections and infectious illnesses must be reported</p> <p>1.5 State the importance of ensuring that any open wounds and skin infections are treated and covered with a suitable dressing</p>			
2	Know how to deal with indicators of potential food safety hazards in a retail environment	<p>2.1 Outline the types of indicators of potential food safety hazards to remain alert for in own workplace</p> <p>2.2 Outline how to recognise indicators of potential food safety hazards in own workplace</p> <p>2.3 State which indicators of potential food safety hazards are within own authority to deal with, and which indicators must be reported</p> <p>2.4 Outline the organisational procedures for dealing with indicators of potential food safety hazards that are within own authority</p>			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
3	Be able to keep self and clothes clean while working with food in a retail environment	<p>3.1 Keep own hair, skin, nails and clothing in a suitable condition for working with food</p> <p>3.2 Remove any jewellery and other accessories that could cause food safety hazards</p> <p>3.3 Ensure that any protective clothing the organisation provides for own use is:</p> <ul style="list-style-type: none"> worn in line with organisational requirements changed when the organisation says it should be <p>3.4 Wash own hands:</p> <ul style="list-style-type: none"> at the right times to keep them in a suitable condition for working with food using effective methods <p>3.5 Demonstrate safe behaviour that helps prevent contamination to the food being worked with</p> <p>3.6 Identify the person to whom to report any open wounds, skin infections and infectious illnesses</p>			
4	Be able to deal with indicators of potential food safety hazards in a retail environment	<p>4.1 Identify obvious indicators of potential food safety hazards in the workplace</p> <p>4.2 Deal with potential food safety hazards by:</p> <ul style="list-style-type: none"> removing them when authorised to do so reporting them to the right person when dealing with them is not within own authority 			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 17: Maintain food safety while working with food in a retail environment

Unit reference number: J/503/5674

Level: 2

Credit value: 6

Guided learning hours: 13

Unit summary

This unit assesses the occupational competence of individuals who work in a retail environment, and whose work involves any of these activities:

- handling wrapped or unwrapped food including that subject to temperature control requirements (for example, in storage, display, in the bakery or on the deli counter)
- preparing unwrapped food, including that subject to temperature control requirements.

Assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

Simulation is not allowed for any performance evidence within this unit.

If the assessor is unable to make judgements about the specialist skills and knowledge covered by this unit, expert witness testimony must be sought from a person with suitable current experience, to confirm the learners' competence.

The learner may have undertaken formal food safety training that may contribute to the evidence for this unit.

The terms highlighted in bold in the assessment criteria are explained in a glossary appended to this unit.

Skillsmart Retail's Assessment Principles for Retail Qualifications can be found on their website (www.skillsmartretail.com)

Recording of evidence

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Glossary for unit B.21

Cross-contamination	<p>In a retail environment, there are two kinds of cross-contamination you need to guard against:</p> <ol style="list-style-type: none">1 the transfer of harmful bacteria between foods by direct contact (eg the juices of raw meat dripping on to cooked meat stored on a lower shelf) or indirect contact (eg via the hands, clothing, cloths, equipment or other surfaces)2 the cross-contamination of foods containing specific allergens (eg nuts, milk, eggs) with other food (eg by use of common utensils on cold meat counters and salad bars, slicers on deli counters, etc; mixing of foods due to damaged packaging or spillage or via hands, clothing, cloths or other surfaces).
Food handling practices	<p>Depending on the type of food you work with and the activities you carry out, food handling practices may include:</p> <ul style="list-style-type: none">• keeping finished products separate from other materials• keeping raw and cooked meat products separate• getting rid of waste, contaminated or damaged products.

Food safety hazards	<p>Something which may cause harm to the consumer and can be:</p> <ul style="list-style-type: none"> • microbiological (for example, bacteria, moulds, viruses) • chemical (for example, pesticides used on fruit and vegetables, chemicals used in cleaning or for pest control) • physical (for example, insects, parasites, glass, nails) • allergenic (for example, nuts, milk, eggs).
Food spoilage	When food goes bad and has a noticeable change in its taste, smell or appearance.
Infestation	The presence of pests such as insects or rodents in the workplace which put food safety at risk.
Procedures	A series of clear steps or instructions on how to do things; rules. Some organisations document their procedures formally in writing, and others simply have procedures that all staff understand and follow but which are not written down.
Specified temperatures	Temperatures specified by relevant legislation or in own organisation's procedures.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Know how food in a retail environment can become unsafe for consumers	<p>1.1 Describe the types of infestation and how these can occur in a retail environment</p> <p>1.2 Describe the types of food safety hazard and cross-contamination and how these can occur in a retail environment</p> <p>1.3 Describe the causes of food spoilage in a retail environment</p>			
2	Know the routine working practices that contribute to food safety in a retail environment	<p>2.1 Describe how food handling practices affect food safety in the workplace</p> <p>2.2 Describe why own immediate work area must be kept clean and tidy</p> <p>2.3 Describe why the organisation's schedules and procedures for cleaning the workplace must be followed</p> <p>2.4 Describe why certain foods must be kept at specified temperatures</p> <p>2.5 Describe why the organisation's schedule and procedures for checking and reporting the condition of food and food storage areas must be followed</p>			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
3	Be able to maintain own work area in a safe condition for working with food	3.1 Keep own immediate work area clean and tidy when working 3.2 Clean own work area at the scheduled times and in line with organisational procedures 3.3 Maintain tools, utensils and equipment: <ul style="list-style-type: none"> • in good working order • in a hygienic condition 			
4	Be able to work with food in a way that keeps it safe for customers	4.1 Dispense of food waste: <ul style="list-style-type: none"> • promptly • hygienically • in line with organisational procedures 4.2 Protect the food being worked with from food safety hazards and cross-contamination 4.3 Deal with contaminated food in line with organisational procedures 4.4 Deal with items that may cause allergic reactions in line with organisational procedures 4.5 Label products clearly with the prescribed use-by dates			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
5	Be able to record the condition of food	5.1 Perform checks on the condition of food and food storage areas in line with the organisation's schedule and procedures			
		5.2 Record checks on the condition of food and food storage areas in line with organisational procedures			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 18: Pick products in a retail environment to fulfil customer orders

Unit reference number: R/503/5676

Level: 2

Credit value: 4

Guided learning hours: 19

Unit summary

This unit assesses the occupational competence of individuals who are responsible for picking products in a retail environment to fulfil customer orders. The context could be a conventional store or a 'dot.com' store but not a warehouse.

Assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

Simulation is not allowed for any performance evidence within this unit.

Skillsmart Retail's Assessment Principles for Retail Qualifications can be found on their website (www.skillsmartretail.com).

Recording of evidence

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Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Be able to organise own work to pick orders within a retail environment	<p>1.1 Plan own route around the retail environment, ensuring this will enable orders to be picked in line with organisational procedures</p> <p>1.2 Identify the person who can give advice if picking instructions are unclear</p>			
2	Be able to pick products in a retail environment to meet customer requirements	<p>2.1 Minimise the inconvenience caused to other people in the retail environment when picking products</p> <p>2.2 Perform checks to ensure that the products being picked are of saleable quality</p> <p>2.3 Protect products from damage and deterioration throughout the picking process</p> <p>2.4 Follow organisational procedures for recording picked products and unavailable products</p> <p>2.5 Choose alternatives as allowed when products requested by customers are not in stock</p> <p>2.6 Use methods for separating products for different orders when picking for more than one customer</p>			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
3	Be able to prepare picked orders for collection or despatch from a retail environment	3.1 Pack orders in ways that: <ul style="list-style-type: none"> • keep products in saleable condition during transit • avoid using excessive amounts of packaging 3.2 Place packed orders in the designated places ready for collection or despatch from the retail environment			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____
(if sampled)

Date: _____

Unit 19: Load orders for despatch from a retail store to customers

Unit reference number: Y/503/5677

Level: 1

Credit value: 3

Guided learning hours: 15

Unit summary

This unit assesses the occupational competence of individuals who are responsible for loading orders for despatch from a retail store to customers.

Assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

Simulation is not allowed for any performance evidence within this unit.

Skillsmart Retail's Assessment Principles for Retail Qualifications can be found on their website (www.skillsmartretail.com).

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Know why it is important to work safely in the loading area	<p>1.1 State the importance of keeping the loading area free of obstacles, litter and spillages</p> <p>1.2 State how regular equipment checks help to ensure safety in the loading area</p>			
2	Know how own working practices contribute to an efficient delivery service	<p>2.1 State the importance of checking the information on order labels</p> <p>2.2 State how the positioning of orders in the vehicle helps the delivery process to run smoothly and efficiently</p>			
3	Be able to keep loading facilities and equipment in a usable condition	<p>3.1 Perform checks on the loading area for obstacles, litter and spillages</p> <p>3.2 Remove any obstacles, litter and spillages from the loading area</p> <p>3.3 Perform checks to ensure that loading equipment is fit for use</p> <p>3.4 Clean loading equipment in line with organisational procedures</p> <p>3.5 Repair loading equipment in line with organisational procedures and when authorised to do so</p>			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
4	Be able to ensure that orders are ready for loading	4.1 Perform checks to ensure that orders are labelled with all the required information			
		4.2 Perform checks to ensure that orders are placed in the designated areas ready for loading			
5	Be able to load orders into delivery vehicles	5.1 Lift and move packed orders in ways that attempt to prevent: <ul style="list-style-type: none"> • injury to self and others • damage to goods and property 5.2 Position orders in a vehicle according to: <ul style="list-style-type: none"> • instructions for the required order of delivery • organisational procedures for keeping goods secure and protected from damage during transit 			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 20: Check stock levels and sort out problems with stock levels in a retail environment

Unit reference number: D/503/5678

Level: 2

Credit value: 2

Guided learning hours: 10

Unit summary

This unit assesses the occupational competence of individuals responsible for checking stock levels in a retail environment.

Assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

Simulation is not allowed for any performance evidence within this unit.

Skillsmart Retail's Assessment Principles for Retail Qualifications can be found on their website (www.skillsmartretail.com).

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Understand the purpose of checking stock levels in a retail environment	1.1 Explain how accurate stock counting contributes to: <ul style="list-style-type: none"> maintaining adequate stock levels customer satisfaction sales 			
2	Be able to check stock levels in a retail environment as instructed	2.1 Check stock levels in line with: <ul style="list-style-type: none"> instructions for where and when to count stock organisational procedures for counting stock and recording stock levels health and safety requirements to be observed when counting stock the need to minimise inconvenience to other people in the retail environment when stock is being counted 			
3	Be able to deal with or report stock-related problems that arise when checking stock levels in a retail environment	3.1 Record problems with stock and stock levels as these arise 3.2 Resolve problems with stock and stock levels that are within own authority to deal with in line with organisational procedures 3.3 Identify the person who must be told if any problems arise with stock and stock levels that are not within own authority to deal with			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 21: Maintain moisture levels for crops or plants

Unit reference number: R/502/0854

Level: 2

Credit value: 2

Guided learning hours: 15

Unit summary

This unit comes from the land based and environmental sector. It is included as an option within the retail skills qualifications for learners who work in garden centres.

Assessment requirements/evidence requirements

The following assessment guidance is provided by Lantra, the unit owner:

Simulation will not be acceptable where the unit is included in qualifications which verify competent performance. Please refer to Lantra's Assessment Strategy for further guidance.

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Know why it is important to maintain moisture for crops and plants	1.1 Describe how moisture requirements vary according to the crop or plants and stage of development 1.2 Describe the methods and systems for maintaining moisture levels 1.3 Describe the impact of prevailing weather conditions on the crop or plants water requirements 1.4 Identify the types of records required and the importance of accurate record keeping			
2	Know the types of equipment required and how to maintain them	2.1 Describe the equipment which will be necessary for maintaining moisture levels to crops or plants 2.2 Describe methods of maintaining the equipment ready for use			
3	Know the current health and safety legislation and environmental good practice	3.1 Outline the current health and safety legislation, codes of practice and any additional requirements, which apply to this area of work 3.2 Describe how environmental damage can be minimised			
4	Be able to select, use and maintain equipment	4.1 Select appropriate equipment for this area of work 4.2 Use equipment according to manufacturer's instructions and legal requirements 4.3 Prepare, maintain and store equipment in a safe and effective working condition			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
5	Be able to maintain moisture levels for crops and plants	5.1 Identify correctly the condition of the crop or plant 5.2 Maintain moisture levels in accordance with the crop or plant requirements 5.3 Provide clear and accurate information for recording purposes			
6	Be able to work safely and minimise environmental damage	6.1 Work in a way which maintains health and safety and is consistent with current legislation, codes of practice and any additional requirements 6.2 Carry out work in a manner which minimises environmental damage			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 22: Provide nutrients to crops or plants

Unit reference number: L/502/0853

Level: 2

Credit value: 2

Guided learning hours: 15

Unit summary

This unit comes from the land based and environmental sector. It is included as an option within the retail skills qualifications for learners who work in garden centres.

Assessment requirements/evidence requirements

The following assessment guidance is provided by Lantra, the unit owner:

Simulation will not be acceptable where the unit is included in qualifications which verify competent performance. Please refer to Lantra's Assessment Strategy for further guidance.

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Know how nutrient requirements vary and their method of application	<p>1.1 Describe how nutrient requirements vary according to the crop or plant grown and stage of development</p> <p>1.2 Describe the range of conditions in which nutrient stress can occur</p> <p>1.3 Describe the nutrients which are commonly used in the cultivation of crops or plants</p> <p>1.4 Describe methods of providing nutrients to crops or plants</p> <p>1.5 Describe the types of records required and the importance of accurate record keeping</p>			
2	Know the types of equipment required and how to maintain them	<p>2.1 Describe the equipment and methods of maintaining used to provide nutrients to crops or plants</p>			
3	Know the current health and safety legislation and environmental good practice	<p>3.1 Outline the current health and safety legislation, codes of practice and any additional requirements which apply to this area of work</p> <p>3.2 Describe how environmental damage can be minimised</p>			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
4	Be able to provide nutrients to plants or crops	4.1	Identify the condition of plants or crops in relation to nutrient requirements		
		4.2	Apply nutrients correctly to maintain crop or plant growth and development as required		
		4.3	Provide clear and accurate information for recording purposes		
5	Be able to work safely and minimise environmental damage	5.1	Work in a way which maintains health and safety and is consistent with current legislation, codes of practice and any additional requirements		
		5.2	Carry out work in a manner which minimises environmental damage		
6	Be able to select use and maintain equipment	6.1	Select and use appropriate equipment according to manufacturer's instructions and legal requirements		
		6.2	Prepare, maintain and store equipment in a safe and effective working condition		

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 23: Remove unwanted plant growth to maintain development

Unit reference number: Y/502/1214

Level: 2

Credit value: 5

Guided learning hours: 38

Unit summary

This unit comes from the land-based and environmental sector. It is included as an option within the retail skills qualifications for learners who work in garden centres.

Assessment requirements/evidence requirements

The following assessment guidance is provided by Lantra, the unit owner:

Simulation will not be acceptable where the unit is included in qualifications which verify competent performance. Please refer to Lantra's Assessment Strategy for further guidance.

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Know the different types of unwanted plant growth	1.1 Identify different types of plant material and explain why it must be removed covering: <ul style="list-style-type: none"> • damaged plants • diseased material • weeds • plant debris • non-typical • dead • excessive growth • badly positioned 			
2 Know how to maintain plant development	2.1 Describe how all the following methods can be used to maintain/control plant development: <ul style="list-style-type: none"> • trimming • supporting • thinning • spacing • irrigation • growth regulators • lighting and shading • protection • pruning 			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
3	Know the types of equipment required and how to maintain them	3.1 Describe the equipment which will be necessary for maintaining plant development 3.2 Describe methods of maintaining the equipment ready for use			
4	Know the current health and safety legislation and environmental good practice	4.1 Outline the current health and safety legislation, codes of practice and any additional requirements, which apply to this area of work 4.2 Describe how environmental damage can be minimised 4.3 Describe the correct methods for disposing of organic and inorganic waste 4.4 Describe why it is important to maintain hygiene and how this is achieved			
5	Be able to select, use and maintain equipment	5.1 Select appropriate equipment for this area of work 5.2 Use equipment according to manufacturer's instructions and legal requirements 5.3 Prepare, maintain and store equipment in a safe and effective working condition			
6	Be able to identify unwanted plant growth	6.1 Recognise unwanted plant material as appropriate			
7	Be able to remove unwanted plant growth	7.1 Remove unwanted plant material using appropriate techniques according to the species, time of year, stage of development 7.2 Maintain the growing environment in a hygienic condition			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
8	Be able to work safely and minimise environmental damage	8.1 Work in a way which maintains health and safety and is consistent with current legislation, codes of practice and any additional requirements			
		8.2 Carry out work in a manner which minimises environmental damage			
		8.3 Dispose of waste safely and correctly			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 24: Identify and report the presence of pests, diseases and disorders

Unit reference number: K/502/1511

Level: 2

Credit value: 3

Guided learning hours: 23

Unit summary

This unit comes from the land-based and environmental sector. It is included as an option within the retail skills qualifications for learners who work in garden centres.

Assessment requirements/evidence requirements

The following assessment guidance is provided by Lantra, the unit owner:

Simulation will not be acceptable where the unit is included in qualifications which verify competent performance. Please refer to Lantra's Assessment Strategy for further guidance.

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Identify and report the presence of pests, diseases and disorders	1.1 Monitor the crop(s) in accordance with production requirements 1.2 Correctly identify the presence of pests, diseases and disorders 1.3 Correctly identify the presence of any biological controls in use and beneficial insects 1.4 Establish the extent of the pest population, disease and any disorders 1.5 Promptly report the presence to the appropriate person			
2	Be able to work safely and minimise environmental damage	2.1 Work in a way which maintains health and safety and is consistent with relevant legislation, codes of practice and any additional requirements 2.2 Carry out work in a manner which minimises environmental damage			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
3	Know how to identify and report the presence of pests, diseases and disorders	3.1			
		3.2			
		3.3			
		3.4			
		3.5			
4	Know relevant health and safety legislation and environmental good practice	4.1			
		4.2			
		4.3			
		4.4			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 25: Finish bake-off food products in a retail environment

Unit reference number: H/503/5679

Level: 2

Credit value: 3

Guided learning hours: 15

Unit summary

This unit assesses the occupational competence of individuals who prepare bake-off products (partly-baked products that require final baking) in a retail environment. Such products may include bread, pastry, biscuits and scones.

Assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

Simulation is not allowed for any performance evidence within this unit.

If the assessor is unable to make judgements about the specialist skills and knowledge covered by this unit, expert witness testimony must be sought from a person with suitable current experience, to confirm the learners' competence.

Skillsmart Retail's Assessment Principles for Retail Qualifications can be found on their website (www.skillsmartretail.com).

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Understand the baking and cooling processes that apply to bake-off food products	1.1 Explain the factors that affect the baking of bake-off products 1.2 Explain what happens to the ingredients of bake-off products during baking 1.3 Explain the conditions required for cooling bake-off products after baking			
2	Know the legal and organisational requirements that apply to bake-off products	2.1 Describe the legal and organisational requirements that apply to bake-off products			
3	Be able to finish the baking process of bake-off products in a retail environment	3.1 Apply methods to finish baking bake-off products in line with organisational procedures 3.2 Assess the quantity and quality of baked products using organisational procedures 3.3 Apply organisational procedures for dealing with bake-off products that are not fit for sale 3.4 Store bake-off products at a temperature that will keep them in the condition required for the next stage in the bakery process			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 26: Glaze, coat and decorate bake-off products for sale in a retail environment

Unit reference number: Y/503/5680

Level: 2

Credit value: 3

Guided learning hours: 15

Unit summary

This unit assesses the occupational competence of individuals who glaze, coat or decorate ready prepared goods (bake-off goods), such as bread, pastry, biscuits and scones, in a retail environment.

Assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

Simulation is not allowed for any performance evidence within this unit.

If the assessor is unable to make judgements about the specialist skills and knowledge covered by this unit, expert witness testimony must be sought from a person with suitable current experience, to confirm the learners competence.

Skillsmart Retail's Assessment Principles for Retail Qualifications can be found on their website (www.skillsmartretail.com).

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Know the legal and organisational requirements that apply when glazing, coating and decorating bake-off products in a retail environment	1.1 Describe the legal and organisational requirements that apply when glazing, coating or decorating bake-off products in a retail environment			
2	Be able to glaze, coat and decorate bake-off products in a retail environment	<p>2.1 Assess whether bake-off products and finishing materials are in the right condition for glazing, coating or decorating</p> <p>2.2 Apply glazes, coating, or decorative materials to bake-off products using organisational procedures</p> <p>2.3 Assess whether glazed, coated or decorated bake-off products:</p> <ul style="list-style-type: none"> • meet the organisation's specification • are correctly positioned for the next stage in the bakery process <p>2.4 Apply organisational procedures for dealing with finished bake-off products that fail to meet the product specification</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	2.5 Produce glazed, coated or decorated bake-off products: <ul style="list-style-type: none"> • to the amount required • within an allocated time • with a minimum of waste 2.6 Apply organisational procedures for saving or disposing of waste materials resulting from working with bake-off products			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 27: Wrap and pack goods for customers in a retail environment

Unit reference number: K/503/5683

Level: 1

Credit value: 3

Guided learning hours: 18

Unit summary

This unit assesses the occupational competence of individuals who are responsible for packaging customers' purchases in a retail environment.

Assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

Simulation is allowed for the performance evidence within this unit only if no opportunities exist to gather workplace evidence.

AC 1.2, 3.1: If the organisation does not have a written policy, learners need to ask their manager for broad guidelines and follow these where the unit refers to a policy.

Skillsmart Retail's Assessment Principles for Retail Qualifications can be found on their website (www.skillsmartretail.com).

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Know about the types of packaging that can be used in a retail environment	<p>1.1 Outline any legal requirements relating to the types of packaging provided to customers in own workplace</p> <p>1.2 Outline the organisation's policy relating to the types of packaging provided to customers</p> <p>1.3 Outline the ways in which goods can be damaged if protective packaging is not used</p>			
2	Know the importance of minimising and disposing of waste in a retail environment	<p>2.1 Outline why wastage needs to be kept to a minimum</p> <p>2.2 State the importance of disposing of waste materials promptly</p>			
3	Be able to package goods for customers in a retail environment	<p>3.1 Choose packaging materials that:</p> <ul style="list-style-type: none"> • meet legal requirements and organisational policy • are suitable for the goods <p>3.2 Package goods, ensuring that:</p> <ul style="list-style-type: none"> • they are protected from damage during packaging • wastage is kept to a minimum • tools are used safely • packages are closed and sealed in line with organisational instructions 			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	3.3 Identify the designated person to ask for advice if instructions are not clear 3.4 Store materials and tools in the designated places and in line with organisational procedures after use 3.5 Dispose of waste materials in the designated containers			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 28: Display stock to promote sales to customers in a retail environment

Unit reference number: M/503/5684

Level: 2

Credit value: 5

Guided learning hours: 26

Unit summary

This unit assesses the occupational competence of individuals who are responsible for setting up, labelling and dismantling displays in a retail environment. No specialist visual merchandising skills are needed to achieve the assessment criteria.

Assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

Simulation is not allowed for any performance evidence within this unit.

Skillsmart Retail's Assessment Principles for Retail Qualifications can be found on their website (www.skillsmartretail.com).

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Understand the importance of checking for potential health and safety issues before setting up and dismantling displays	1.1 Explain the importance of checking for potential health and safety issues before setting up and dismantling displays			
2	Understand how displays help to promote sales	2.1 Explain how sales can be promoted by: <ul style="list-style-type: none"> the effective use of space in a display the positioning of products within a display the use of labelling in a display 			
3	Know about legal requirements for labelling products in a display	3.1 Describe the legal requirements for labelling products in a display 3.2 State what can happen if legal requirements for labelling products in a display are not met			
4	Be able to establish the availability of space and other resources needed for a display	4.1 Identify the person or people who can provide advice if any problems arise with the space or other resources needed to prepare a display as instructed 4.2 Perform checks on the space available for a display to ensure that: <ul style="list-style-type: none"> there is enough space for the display the display will not cause an obstruction 			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
		4.3 Perform checks to ensure that the materials, equipment and stock needed for the display are: <ul style="list-style-type: none"> • available • in working order 			
5	Be able to prepare a display area for use in a retail environment	5.1 Prepare a display area for use, ensuring that the area is: <ul style="list-style-type: none"> • clear of any items not wanted for the display • clean 			
6	Be able to set up a display in a retail environment	6.1 Set up a display: <ul style="list-style-type: none"> • using safe working practices • in line with plans • within the time allowed • minimising the inconvenience caused to other people nearby 6.2 Check that the finished display: <ul style="list-style-type: none"> • has the levels of stock needed • is clean, tidy and safe for use 6.3 Clear the area where the display has been set up of any equipment, excess materials and waste in line with organisational procedures			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
7	Be able to label a display of stock in a retail environment	7.1 Perform checks to ensure that the information on labels meets legal and organisational requirements before including labels in a display			
		7.2 Identify the person who should be told about any information on labels that needs changing			
		7.3 Position labels in line with organisational requirements			
8	Be able to dismantle a display in a retail environment	8.1 Dismantle the display: <ul style="list-style-type: none"> • using safe working practices • within the time allowed • minimising the inconvenience caused to other people nearby 			
		8.2 Clear the area where the display has been dismantled of any equipment or excess materials: <ul style="list-style-type: none"> • safely • using the designated storage or disposal facilities 			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 29: Help customers to choose products in a retail environment

Unit reference number: T/503/5685

Level: 2

Credit value: 6

Guided learning hours: 20

Unit summary

This unit assesses the occupational competence of individuals who are responsible for selling products in a retail environment. The unit covers finding out what the customer needs, helping the customer to choose products and closing the sale.

Assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

Simulation is not allowed for any performance evidence within this unit.

Skillsmart Retail's Assessment Principles for Retail Qualifications can be found on their website (www.skillsmartretail.com).

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Understand the importance of focusing on the individual customer's requirements	1.1 Explain the importance of customer confidence and loyalty to the business 1.2 Explain the importance of focusing on the product features and benefits that interest the individual customer			
2	Know how sales are confirmed with the customer and closed	2.1 Describe how to recognise buying signals 2.2 Describe techniques for closing the sale			
3	Be able to find out what products customers may be interested in buying	3.1 Ask customers questions to find out: <ul style="list-style-type: none"> • what they are looking for • which product features and benefits interest them 			
4	Be able to help customers to choose the products that best meet their needs	4.1 Describe relevant product features and benefits accurately in ways that attempt to help customers to differentiate between products 4.2 Give customers the opportunity to evaluate products and ask questions 4.3 Respond to customers' questions in ways that attempt to encourage sales and promote goodwill			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
5 Be able to close sales	5.1 Confirm customers' buying decisions 5.2 Use questioning techniques to ascertain whether customers need any associated or additional products 5.3 Explain to customers any customer rights that apply to their purchases 5.4 Ensure that customers know where to pay for their purchases			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 30: Carry out promotional campaigns in a retail environment

Unit reference number: A/503/5686

Level: 2

Credit value: 4

Guided learning hours: 18

Unit summary

This unit assesses the occupational competence of individuals who work in retail and who are involved in promotional campaigns of particular products. The unit is **not** just about promoting products as part of normal sales transactions.

Assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

Simulation is not allowed for any performance evidence within this unit.

Skillsmart Retail's Assessment Principles for Retail Qualifications can be found on their website (www.skillsmartretail.com).

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Understand opportunities to promote particular products	<p>1.1 Explain how seasonal trends affect opportunities for sales of the products within own area of responsibility</p> <p>1.2 Explain how to recognise potential opportunities for increasing sales of particular products</p> <p>1.3 Evaluate the potential of different promotional opportunities to increase sales</p> <p>1.4 Explain how promotional sales can lead to future sales</p>			
2	Be able to promote products to customers as part of a promotional campaign	<p>2.1 Promote offers to encourage sales when interacting with customers</p>			
3	Be able to contribute to the evaluation of a promotional campaign	<p>3.1 Record information about the effectiveness of a promotional campaign, ensuring the information is:</p> <ul style="list-style-type: none"> • relevant to the campaign • accurate <p>3.2 Communicate the recorded information of a promotional campaign:</p> <ul style="list-style-type: none"> • accurately • to the person or people who need this information 			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 31: Deal with customer queries and complaints in a retail environment

Unit reference number: F/503/5687

Level: 2

Credit value: 4

Guided learning hours: 24

Unit summary

This unit assesses the occupational competence of individuals who deal with customers' queries and complaints in a retail environment.

This unit is **not** for learners who deal with complaints as a major part of their job role, for example if they work in a customer contact centre.

Assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

Simulation is not allowed for any performance evidence within this unit.

AC 3.1: 'Politely' means demonstrating respect and consideration for other people through the use of appropriate body language, verbal language, tone of voice (or the sign language equivalent) and facial expressions.

AC 4.2: can be assessed by asking 'What if?' questions, if no situation arises where the organisation is, or appears to be, responsible for the situation that has caused the customer to complain.

AC 4.3: If the organisation does not have a written policy, learners need to ask their manager for broad guidelines and follow these where the unit refers to a policy.

Skillsmart Retail's Assessment Principles for Retail Qualifications can be found on their website (www.skillsmartretail.com).

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Understand how resolving customer queries and complaints contributes to customer loyalty and confidence	1.1 Explain how resolving customer queries can increase customer loyalty and confidence 1.2 Explain how resolving customer complaints can increase customer loyalty and confidence			
2	Understand how to manage angry customers when dealing with customer queries and complaints in a retail environment	2.1 Explain how to manage angry customers when dealing with customer queries and complaints			
3	Be able to deal with customers' queries in a retail environment	3.1 Acknowledge customers' requests for information and advice politely 3.2 Ask questions as needed to discover customers' needs for information and advice 3.3 Provide information and advice to customers that is: <ul style="list-style-type: none"> • relevant to their query • accurate • up to date 3.4 Ask customers questions to ensure that the information and advice provided has met their needs			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
		3.5 Provide alternative solutions to help customers when information and advice given is not satisfactory 3.6 Refer requests for information or advice to the designated person when helping the customer is not within own authority			
4	Be able to deal with customers' complaints in a retail environment	4.1 Confirm the nature of the complaint with the customer, using information they have provided 4.2 Apologise to the customer when the organisation is, or appears to be, responsible for the situation that has caused the customer to complain 4.3 Take action to resolve complaints in line with: <ul style="list-style-type: none"> • legal requirements • organisational policy 4.4 Refer complaints that are not within own authority to resolve, ensuring that: <ul style="list-style-type: none"> • the complaint is referred in line with organisational procedures • the organisation's referral procedure is explained to the customer 4.5 Provide the opportunity for customers to ask questions about the organisation's referral procedure			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 32: Demonstrate products to customers in a retail environment

Unit reference number: J/503/5688

Level: 2

Credit value: 3

Guided learning hours: 15

Unit summary

This unit assesses the occupational competence of individuals who are responsible for demonstrating the features and benefits of products to customers. This may be a group or a single customer.

Assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

Simulation is not allowed for any performance evidence within this unit.

Skillsmart Retail's Assessment Principles for Retail Qualifications can be found on their website (www.skillsmartretail.com).

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Understand how product demonstrations can help to increase sales	<p>1.1 Explain the importance of knowing the difference between the 'features' and 'benefits' of products when demonstrating them</p> <p>1.2 Explain how demonstrating the features and benefits of products can help to promote and sell them</p> <p>1.3 Explain the importance of organising product demonstrations into logical steps and stages</p>			
2	Be able to make the preparations needed to ensure a safe and efficient product demonstration	<p>2.1 Take the necessary safety precautions before, during and immediately after demonstrating products</p> <p>2.2 Perform checks to ensure that all the equipment and products needed for the product demonstration are to hand before starting the demonstration</p>			
3	Be able to communicate to customers the features and benefits of the products being demonstrated	<p>3.1 Demonstrate products:</p> <ul style="list-style-type: none"> • in a logical sequence of steps and stages • ensuring that all the product features and benefits the demonstration is intending to highlight are covered <p>3.2 Provide accurate supporting commentary as needed that explains to customers the features and benefits of the product being demonstrated</p>			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
4	Be able to tidy the demonstration area when a product demonstration is finished	4.1 Explain the importance of tidying the demonstration area when the product demonstration is finished			
		4.2 Clear equipment and products away after the product demonstration is finished in line with organisational procedures			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 33: Process payments for purchases in a retail environment

Unit reference number: L/503/5689

Level: 2

Credit value: 4

Guided learning hours: 17

Unit summary

This unit assesses the occupational competence of cashiers in a retail environment.

Assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

Simulation is not allowed for any performance evidence within this unit.

AC 2.6: 'Politely' means demonstrating respect and consideration for other people through the use of appropriate body language, verbal language, tone of voice (or the sign language equivalent) and facial expressions.

Skillsmart Retail's Assessment Principles for Retail Qualifications can be found on their website (www.skillsmartretail.com).

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Understand legal and organisational requirements for processing payments in a retail environment	<p>1.1 Explain the customer's rights and the organisation's duties and responsibilities in relation to the pricing of goods</p> <p>1.2 Explain how own organisation deals with suspected fraud</p>			
2	Be able to process payments for purchases in a retail environment	<p>2.1 Resolve pricing problems by:</p> <ul style="list-style-type: none"> referring to reliable pricing information seeking advice from the person who can provide clarification when pricing information is unclear or unavailable <p>2.2 Tell customers the correct amount to pay, taking account of any special offers or discounts that apply</p> <p>2.3 Process payments in line with organisational procedures, where the payment is acceptable</p> <p>2.4 Explain how to tell customers tactfully that payment cannot be approved</p> <p>2.5 Offer any additional services to customers</p> <p>2.6 Treat customers politely throughout the payment process</p> <p>2.7 Acknowledge other customers who are waiting to pay or to be helped in some way</p>			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 34: Process applications for credit agreements offered in a retail environment

Unit reference number: F/503/5690

Level: 2

Credit value: 5

Guided learning hours: 25

Unit summary

This unit assesses the occupational competence of individuals who are responsible for processing applications for credit agreements (not a store credit card) in a retail environment, where such applications are for the purpose of purchasing particular items.

Assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

Simulation is not allowed for any performance evidence within this unit.

If the assessor is unable to make judgements about the specialist skills and knowledge covered by this unit, expert witness testimony must be sought from a person with suitable current experience, to confirm the learners' competence.

AC 3.5: If the organisation does not have a written policy, learners need to ask their manager for broad guidelines and follow these where the unit refers to a policy.

Skillsmart Retail's Assessment Principles for Retail Qualifications can be found on their website (www.skillsmartretail.com).

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Understand the legal aspects of offering credit agreements	1.1 Explain the legal requirements for giving information to customers when offering credit agreements			
2	Understand legal aspects of processing credit agreement applications	2.1 Explain the legal requirements relating to credit checks and authorisation			
3	Be able to process applications for credit agreements offered in a retail environment	3.1 Explain clearly to the customer the features and conditions of the available credit agreements 3.2 Allow sufficient time and opportunities for the customer to ask questions 3.3 Ask the customer questions to confirm their credit agreement requirements 3.4 Complete required documentation accurately 3.5 Carry out credit checks and authorisation procedures required by law and organisational policy 3.6 Explain the organisational procedures to follow when dealing with difficulties in processing credit agreement applications			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 35: Promote loyalty schemes to customers in a retail environment

Unit reference number: J/503/5691

Level: 2

Credit value: 3

Guided learning hours: 11

Unit summary

This unit assesses the occupational competence of individuals who are responsible for promoting an organisation's loyalty scheme.

For the purposes of this unit a loyalty scheme means a scheme offered by a retail organisation to its customers, subject to terms and conditions under which eligible transactions are recorded as accumulated points. These points can be exchanged by the customer in the future for rewards such as vouchers, discounts or air miles. The unit is not about promoting or helping the customer apply for any kind of payment card.

Assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

Simulation is not allowed for any performance evidence within this unit.

If the assessor is unable to make judgements about the specialist skills and knowledge covered by this unit, expert witness testimony must be sought from a person with suitable current experience, to confirm the learners' competence.

AC 2.1: 'Politely' means demonstrating respect and consideration for other people through the use of appropriate body language, verbal language, tone of voice (or the sign language equivalent) and facial expressions.

Skillsmart Retail's Assessment Principles for Retail Qualifications can be found on their website (www.skillsmartretail.com).

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Understand the benefits to the organisation of signing customers up to the organisation's loyalty scheme	1.1 Explain the benefits to the organisation of signing customers up to the loyalty scheme			
2	Understand the importance of giving customers a good impression when promoting the organisation's loyalty scheme	2.1 Explain the importance of treating customers politely and in a way that promotes goodwill, when promoting the loyalty scheme to them			
3	Be able to communicate to customers the features and benefits of the organisation's loyalty scheme	<p>3.1 Ask customers questions to determine:</p> <ul style="list-style-type: none"> • if they are members of the organisation's loyalty scheme • if they are interested in joining the organisation's loyalty scheme <p>3.2 Describe to customers the benefits to them of joining the loyalty scheme, including any current special offers relating to the scheme</p> <p>3.3 Respond to any customer queries concerning the loyalty scheme while highlighting the benefits of joining it</p>			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
		3.4 Provide customers with any information they need about the scheme to help them to decide whether to join it			
4	Be able to gain customers' commitment to the organisation's loyalty scheme	4.1 Ask customers who are showing signs of interest to sign up for the loyalty scheme			
		4.2 Provide the loyalty scheme membership application to customers			
		4.3 Provide customers with information on how to complete their application for the loyalty scheme			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 36: Provide a bra-fitting service in a retail environment

Unit reference number: Y/503/5694

Level: 2

Credit value: 10

Guided learning hours: 44

Unit summary

This unit assesses the occupational competence of individuals who are responsible for providing a bra-fitting service in a retail environment.

Assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

Simulation is not allowed for any performance evidence within this unit.

If the assessor is unable to make judgements about the specialist skills and knowledge covered by this unit, expert witness testimony must be sought from a person with suitable current experience, to confirm the learners competence.

It is highly unlikely that the assessor will be able to observe all the workplace performance required, owing to the need to meet customer needs for privacy. Where this applies, evidence of competence can come from the training undertaken and from expert witness testimony.

AC 7.2: 'Politely' means demonstrating respect and consideration for other people through the use of appropriate body language, verbal language, tone of voice (or the sign language equivalent) and facial expressions.

Skillsmart Retail's Assessment Principles for Retail Qualifications can be found on their website (www.skillsmartretail.com).

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Understand what a bra-fitting session involves	1.1 Explain the stages of a bra-fitting session and the overall time a session is likely to take 1.2 Explain how to build trust with customers before and during a bra-fitting session 1.3 Explain how to help customers to relax before and during a bra-fitting session 1.4 Explain how to deal with challenging situations, including: <ul style="list-style-type: none"> • unusual body shape • body odour • disability • mastectomy • maternity 			
2 Know the features and benefits of different types of bra	2.1 Describe the basic styles, shapes and sizes of bra 2.2 Describe the different parts of bras, using the technical names for these 2.3 Describe the brands, colours, fabrics, trims and price range of bras available in own sales area 2.4 Describe the size range and fit of the bras in stock 2.5 Describe the features and benefits of different types of bra			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
		2.6 Describe the types of clothing that different types of bra are designed to be worn with			
		2.7 Describe accessories such as enhancers and coordinating garments			
		2.8 Describe trends in bra design, technological solutions and fabrics			
3	Understand how to prolong the life of a bra	3.1 Explain the importance of following manufacturers' guidance on washing and caring for bras 3.2 Explain how bras can be adjusted to prolong their life			
4	Know the arrangements for obtaining bras both in and out of stock	4.1 Describe where different types of bra are to be found within own sales area 4.2 State the scheduled delivery dates for new products for own sales area 4.3 Describe the available systems for ordering lines either not in stock or not carried by the organisation			
5	Know how to fit customers for bras	5.1 Describe how to assess the customer's body size, shape and age 5.2 Describe the equipment and layout needed for the bra-fitting room 5.3 Describe how and where to measure for the customer's band size using a tape measure 5.4 Describe how to estimate the cup size needed			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
		5.5 Describe how to choose the correct bras for the fitting			
		5.6 Describe how to adjust and fit bras			
6	Be able to find potential customers for the bra-fitting service	6.1 Ask questions to clarify and agree customers' need for the bra-fitting service			
		6.2 Describe to customers the process and benefits of the bra-fitting service			
		6.3 Book bra-fitting appointments taking into account the time needed for the bra-fitting service			
7	Be able to fit customer for bras	7.1 Assess customers' fitting needs in ways that attempt to create a rapport with them			
		7.2 Explain politely to customers that an accurate fit cannot be guaranteed if measurements are taken on top of their clothing			
		7.3 Measure customer chest sizes accurately			
		7.4 Choose a range of products to offer customers that: <ul style="list-style-type: none"> • are the correct size • meet customer needs 			
		7.5 Adjust products to provide customer comfort and prolong the life of products			
		7.6 Advise customers on how to care for and prolong the life of products			
		7.7 Meet customer needs for privacy and help throughout the bra-fitting process			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	<p>7.8 Provide opportunities for customers to ask questions about the products and/or bra-fitting service</p> <p>7.9 Ask customers questions to establish whether they are satisfied with the product</p> <p>7.10 Explain other possible courses of action to customers if it is not possible to find a bra to fit them</p>			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 37: Follow guidelines for planning and preparing visual merchandising displays

Unit reference number: D/503/5695

Level: 2

Credit value: 5

Guided learning hours: 22

Unit summary

This unit assesses the occupational competence of individuals who are responsible for planning and preparing visual merchandising displays from guidelines provided in design briefs

Assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

Simulation is not allowed for any performance evidence within this unit.

If the assessor is unable to make judgements about the specialist skills and knowledge covered by this unit, expert witness testimony must be sought from a person with suitable current experience, to confirm the learners' competence.

The learner may have undertaken formal visual merchandising training that may contribute to the evidence for this unit.

Skillsmart Retail's Assessment Principles for Retail Qualifications can be found on their website (www.skillsmartretail.com).

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Understand the importance of visual merchandising displays and design briefs	<p>1.1 Explain the role of visual merchandising displays in marketing, promotional and sales campaigns and activities</p> <p>1.2 Explain the importance of the design brief in creating visual merchandising displays</p>			
2	Understand the selection of approaches and effects in visual merchandising displays	<p>2.1 Explain why different approaches are needed for displays of different types of merchandise</p> <p>2.2 Explain how light, colour, texture, shape and dimension combine to achieve different effects</p>			
3	Understand the sourcing of merchandise and props to be featured in visual merchandising displays	<p>3.1 Explain how to use a design brief to identify the items needed for a display</p> <p>3.2 Explain how different types of merchandise and props can attract customers' attention</p> <p>3.3 Explain the importance of updating stock records to account for merchandise on display</p>			
4	Be able to plan visual merchandising displays to fulfil a design brief	<p>4.1 Select display locations that enable the design brief to be fulfilled</p> <p>4.2 Create ideas for improving the visual effect of displays, ensuring such ideas:</p> <ul style="list-style-type: none"> • create the required effect • are within the limits of the design brief 			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
		<ul style="list-style-type: none"> are within the limits of the organisation's visual design policies are within the limits of own authority 			
5	Be able to source merchandise and props to be featured in visual merchandising displays	<p>5.1 Agree alternative selections of merchandise and props with the designated person, when those originally specified are unavailable or unsuitable</p> <p>5.2 Agree arrangements with suppliers for delivery of merchandise and props</p> <p>5.3 Plan enough time for deliveries of merchandise and props to arrive before the display must be installed</p> <p>5.4 Check the progress of deliveries of merchandise and props</p> <p>5.5 Take action to resolve the situation when delays to deliveries of merchandise and props seem likely</p> <p>5.6 Update stock records to account for merchandise on display</p>			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 38: Dress visual merchandising displays to attract customers

Unit reference number: H/503/5696

Level: 2

Credit value: 7

Guided learning hours: 35

Unit summary

This unit assesses the occupational competence of individuals who dress in-store and window visual merchandising displays, guided by a design brief.

Assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

Simulation is not allowed for any performance evidence within this unit.

If the assessor is unable to make judgements about the specialist skills and knowledge covered by this unit, expert witness testimony must be sought from a person with suitable current experience, to confirm the learners' competence.

The learner may have undertaken formal visual merchandising training that may contribute to the evidence for this unit.

Skillsmart Retail's Assessment Principles for Retail Qualifications can be found on their website (www.skillsmartretail.com).

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Understand the purpose of visual merchandising displays	1.1 Explain the different purposes of visual merchandising displays 1.2 Explain how visual merchandising displays can achieve add-on sales 1.3 Explain why add-on sales are important to the organisation			
2	Understand how visual merchandising displays achieve their intended purposes	2.1 Explain the importance of visual merchandising displays in retail environment 2.2 Explain the importance of being aware of trends relating to visual merchandising 2.3 Explain how props, prototypes, dressings and fixtures create visual effects within displays 2.4 Explain why different kinds of merchandise need different approaches to display			
3	Be able to dress in-store displays and window displays	3.1 Position merchandise, signage and graphics within displays: <ul style="list-style-type: none"> • in ways that attract the attention and interest of target customers • to provide the information that customers need • in line with organisational visual merchandising guidelines 			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	<p>3.2 Group merchandise within displays in ways that suit:</p> <ul style="list-style-type: none"> • the purpose of the display • the style of the display • the intended focal points of the display • the angles from which customers will view the display • the selling features of the merchandise • the visual effect specified by the design brief <p>3.3 Assess whether the display's lighting meets the design brief in achieving the required visual effects and atmosphere</p> <p>3.4 Check that the finished display meets organisational requirements for:</p> <ul style="list-style-type: none"> • health and safety • security • easy access <p>3.5 Seek permission from the designated person to change displays when this is not within own authority</p>			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 39: Order and position signage and graphics for visual merchandising displays

Unit reference number: K/503/5697

Level: 2

Credit value: 3

Guided learning hours: 15

Unit summary

This unit assesses the occupational competence of individuals who order and position signage and graphics for visual merchandising displays under the supervision of visual merchandising specialists.

Assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

Simulation is not allowed for any performance evidence within this unit.

If the assessor is unable to make judgements about the specialist skills and knowledge covered by this unit, expert witness testimony must be sought from a person with suitable current experience, to confirm the learners' competence.

The learner may have undertaken formal visual merchandising training that may contribute to the evidence for this unit.

AC 3.1: If the organisation does not have a written policy, learners need to ask their manager for broad guidelines and follow these where the unit refers to a policy.

Skillsmart Retail's Assessment Principles for Retail Qualifications can be found on their website (www.skillsmartretail.com).

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Understand the role of signage and graphics within visual merchandising	<p>1.1 Explain the purpose of signage in visual merchandising</p> <p>1.2 Explain how signage can contribute to the effectiveness of visual merchandising</p> <p>1.3 Explain the purpose of graphics in visual merchandising</p> <p>1.4 Explain how graphics can contribute to the effectiveness of visual merchandising</p>			
2	Be able to source signage and graphics to meet visual merchandising needs	<p>2.1 Describe to suppliers the signage and graphics required by the design brief</p> <p>2.2 Order signage and graphics:</p> <ul style="list-style-type: none"> • within the required timescales • within the available budget • from suppliers who have confirmed they can meet the specified requirements <p>2.3 Monitor the progress of orders for signage and graphics</p> <p>2.4 Assess signage and graphics when these are delivered, to ensure they meet the agreed requirements</p>			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
3	Be able to position signage and graphics to support visual merchandising	3.1 Position signage and graphics in accordance with: <ul style="list-style-type: none"> • the design brief • any house styles that apply • any branding requirements that apply • organisational policy on signage • legal requirements • the display's intended visual effect and message • organisational safety requirements • the need for signage and graphics to remain securely attached 			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 40: Dismantle and store props and graphics from visual merchandising displays

Unit reference number: M/503/5698

Level: 2

Credit value: 3

Guided learning hours: 15

Unit summary

This unit assesses the occupational competence of individuals who are responsible for dismantling and storing props and graphics from visual merchandising displays under the supervision of visual merchandising specialists.

Assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

Simulation is not allowed for any performance evidence within this unit.

If the assessor is unable to make judgements about the specialist skills and knowledge covered by this unit, expert witness testimony must be sought from a person with suitable current experience, to confirm the learners' competence.

The learner may have undertaken formal visual merchandising training that may contribute to the evidence for this unit.

Skillsmart Retail's Assessment Principles for Retail Qualifications can be found on their website (www.skillsmartretail.com).

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Understand the importance of storing props and graphics for future use in visual merchandising displays	1.1 Explain the importance of labelling props and graphics before leaving them in storage 1.2 Explain why records must be kept of props and graphics in storage 1.3 Explain why props and graphics must be stored securely			
2	Be able to dismantle visual merchandising displays	2.1 Dismantle displays using working practices that: <ul style="list-style-type: none"> comply with organisational health and safety requirements attempt to protect the components of the display from being damaged 2.2 Return merchandise to the designated places in line with organisational procedures 2.3 Dispose of unwanted items from the dismantled display in line with organisational procedures 2.4 Keep records of the movement and disposal of items from dismantled displays in line with organisational procedures 2.5 Clean display sites and components: <ul style="list-style-type: none"> in line with organisational procedures using equipment and materials suited to the task 			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
3	Be able to store props and graphics from dismantled visual merchandising displays	3.1 Assess the space required for props and graphics that are to be put into storage			
		3.2 Store props and graphics: <ul style="list-style-type: none"> • in line with organisational procedures • in secure but accessible places • in ways that do not pose a health and safety risk 			
		3.3 Keep up-to-date storage records in line with organisational procedures			
		3.4 Report any damaged and/or missing props and graphics in line with organisational procedures			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Understand the purpose of props within visual merchandising displays	1.1 Explain the visual effects that can be achieved with life-size and scale models 1.2 Explain why it is necessary to decorate panels and fixtures in creative ways 1.3 Explain how decorated panels and fixtures contribute to visual effects 1.4 Explain why different kinds of merchandise need different approaches to decoration			
2	Be able to specify requirements for visual merchandising props	2.1 Produce specifications for visual merchandising props that: <ul style="list-style-type: none"> • meet the design brief • are achievable within budget and timescales • specify the type, size and function of the props needed • specify whether props can be obtained ready-made or need to be made to order • include plans for obtaining the props 			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
3	Be able to make props for use in visual merchandising displays	<p>3.1 Select techniques, materials, tools and equipment that are suited to making the props specified in the design brief</p> <p>3.2 Produce final versions of props, ensuring they:</p> <ul style="list-style-type: none"> • follow the requirements of the design brief • follow organisational health and safety requirements • are finished within the required timescales 			
4	Be able to decorate fixtures and panels for visual merchandising displays	<p>4.1 select decorative techniques and materials that:</p> <ul style="list-style-type: none"> • attempt to create the visual effect required by the design brief • are within cost limits <p>4.2 Use tools, equipment and materials for decorative work in line with organisational procedures</p> <p>4.3 Produce finished decorative work that:</p> <ul style="list-style-type: none"> • is free from faults • has the visual impact required by the design brief • is consistent with the design brief • is completed within required timescales 			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 42: Assemble visual merchandising displays

Unit reference number: D/503/5700

Level: 2

Credit value: 4

Guided learning hours: 20

Unit summary

This unit assesses the occupational competence of individuals who assemble displays under the supervision of visual merchandising specialists, based on organisational guidelines provided in the form of plans, elevations and drawings.

Assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

Simulation is not allowed for any performance evidence within this unit.

If the assessor is unable to make judgements about the specialist skills and knowledge covered by this unit, expert witness testimony must be sought from a person with suitable current experience, to confirm the learners' competence.

The learner may have undertaken formal visual merchandising training that may contribute to the evidence for this unit.

Skillsmart Retail's Assessment Principles for Retail Qualifications can be found on their website (www.skillsmartretail.com).

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Understand the purpose of layout design	1.1 Explain what layout design is 1.2 Explain the role of layout design in effective visual design practice			
2	Know how to interpret instructions for assembling visual merchandising displays	2.1 Describe the essential features and detailed requirements of display layouts as specified in plans, elevations and drawings 2.2 Describe organisational health and safety and security arrangements needed for displays as specified in plans, elevations and drawings 2.3 Describe potential problems with assembling displays, where such problems are apparent from plans, elevations and drawings			
3	Be able to assemble visual merchandising displays	3.1 Plan the activities and resources needed to assemble displays as specified in plans, elevations and drawings 3.2 Assemble displays in line with: <ul style="list-style-type: none"> organisational guidelines provided agreed deadlines organisational health and safety requirements 3.3 Make adjustments to assembled displays to achieve creative effects within limits of own authority and the guidelines provided			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	3.4 Take actions to resolve problems that arise when assembling displays, within the guidelines provided			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 43: Follow point-of-sale procedures for age-restricted products in a retail environment

Unit reference number: J/503/5707

Level: 2

Credit value: 2

Guided learning hours: 11

Unit summary

This unit assesses the occupational competence of individuals who may be asked by customers to accept payment for age-restricted products such as alcohol or tobacco.

Individuals taking this unit must be of an age appropriate to the products being sold.

Assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

Simulation is not allowed for any performance evidence within this unit.

ACs 3.1, 3.3: 'Politely' means demonstrating respect and consideration for other people through the use of appropriate body language, verbal language, tone of voice (or the sign language equivalent) and facial expressions.

ACs 3.1, 3.3: If the organisation does not have a written policy, learners need to ask their manager for broad guidelines and follow these where the unit refers to a policy.

Skillsmart Retail's Assessment Principles for Retail Qualifications can be found on their website (www.skillsmartretail.com).

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Know about legislation relating to the retail sale of age-restricted products	1.1 Describe own level of authorisation to sell age-restricted products 1.2 State the age restrictions on the products that fall within own responsibility 1.3 Describe what can happen if legal age restrictions are not complied with			
2	Understand the importance of maintaining customer goodwill when requesting proof of age	2.1 Explain the importance of maintaining customer goodwill when requesting proof of age			
3	Be able to follow point-of-sale procedures for age-restricted products in a retail environment	3.1 Ask customers politely for proof of age when this is required by law or organisational policy 3.2 Explain to customers, when necessary, the types of proof of age that can be accepted 3.3 Refuse politely and firmly to accept payment for age-restricted products whenever doing so would be in breach of legislation or organisational policy			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 44: Provide National Lottery products to customers

Unit reference number: L/503/5708

Level: 2

Credit value: 4

Guided learning hours: 25

Unit summary

This unit assesses the occupational competence of individuals who sell National Lottery products.

Assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

Simulation is not allowed for any performance evidence within this unit.

If the assessor is unable to make judgements about the specialist skills and knowledge covered by this unit, expert witness testimony must be sought from a person with suitable current experience, to confirm the learners' competence.

Skillsmart Retail's Assessment Principles for Retail Qualifications can be found on their website (www.skillsmartretail.com).

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Understand how the National Lottery operates	1.1 Explain the role of the operator in promoting the National Lottery 1.2 Explain the role of the National Lottery Commission in monitoring how the National Lottery works 1.3 Explain the potential risks of vulnerable players buying National Lottery products 1.4 Describe relevant legal requirements relating to the National Lottery			
2	Be able to use the service terminal	2.1 Describe the purpose of the service terminal 2.2 Use the service terminal in line with the National Lottery operator's policies and procedures 2.3 Identify the designated person to ask for help when the service terminal is not working properly			
3	Be able to communicate with customers concerning National Lottery products	3.1 Explain to customers, when necessary: <ul style="list-style-type: none"> the rules of National Lottery products how to play National Lottery games 3.2 Explain to customers, when necessary, the differences between National Lottery products in terms of: <ul style="list-style-type: none"> price method of play odds of winning 			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
		3.3 Explain to underage and vulnerable players why you cannot sell National Lottery products to them			
4	Be able to process National Lottery prize payouts	4.1 Process prize payouts in line with the National Lottery operator's requirements			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 45: Advise customers on the fixing and care of tiles

Unit reference number: R/503/5709

Level: 2

Credit value: 6

Guided learning hours: 35

Unit summary

This unit assesses the occupational competence of individuals who sell tiles and tiling products in a retail environment, and who are responsible for explaining to customers how to fix tiles.

Assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

Simulation is not allowed for any performance evidence within this unit.

If the assessor is unable to make judgements about the specialist skills and knowledge covered by this unit, expert witness testimony must be sought from a person with suitable current experience, to confirm the learners' competence.

Skillsmart Retail's Assessment Principles for Retail Qualifications can be found on their website (www.skillsmartretail.com).

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>1 Be able to establish customer requirements for fixing tiles</p>	<p>1.1 Ask customers questions to establish:</p> <ul style="list-style-type: none"> the nature of the surfaces to be tiled how the tiled surfaces are to be used whether there are any existing or planned fixtures, fittings, pipework or cabling whether there is, or will be, underfloor heating, where a floor is to be tiled <p>1.2 Reach an agreement with customers concerning:</p> <ul style="list-style-type: none"> whether tiling is a practical solution for the surface and intended use how the tiled surfaces are to be finished off how best to accommodate any existing or planned fixtures, fittings, pipework or cabling the need for a tanking system, where applicable 			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
2	Be able to explain to customers how to fix tiles	2.1 Explain to customers how to fix tiles, including: <ul style="list-style-type: none"> • how to prepare the surface to be tiled • how to fix and use battens, where applicable • how to waterproof walls before tiling, where applicable • how to site movement joints, where applicable • what types of adhesive and grout are needed and how to apply these, including the curing and drying times involved • how and in what order to apply products • what tools to use for cutting and drilling tiles, and how to use these safely and effectively • which tiles cannot be cut or drilled and why, where applicable • the methods and materials for fitting, fixing and sealing electrical underfloor heating systems, where applicable • safe working and best practice techniques, including the importance of following manufacturers' instructions 			
3	Be able to recommend additional products to customers	3.1 Explain to customers how to take care of the tiled surfaces they intend to fix 3.2 Recommend suitable cleaning and maintenance products to customers			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 46: Provide a counter and takeaway service

Unit reference number: L/601/5016

Level: 1

Credit value: 3

Guided learning hours: 30

Unit summary

This unit comes from the hospitality and catering sector. It is included as an option within the Retail Skills qualifications for learners who provide a counter and takeaway service in a retail environment such as a forecourt shop or in-store cafe.

Assessment requirements/evidence requirements

This unit should be assessed against People 1st's assessment strategy which can be found on People 1st website: www.people1st.co.uk The evidence requirements are given below, these can also be found on People 1st's website.

Serve customers at the counter
The assessor must assess assessment criteria 1.1–1.5 by directly observing the learner's work.
There must be performance evidence, gathered through observing the learner's work for: <ul style="list-style-type: none">• at least one from customers<ul style="list-style-type: none">a customers with routine needsb customers with non-routine needs• at least two from information<ul style="list-style-type: none">a items availableb ingredientsc prices, special offers and promotions

<ul style="list-style-type: none"> at least two from food and drink items <ul style="list-style-type: none"> hot food cold food hot drinks cold drinks at least two from condiments and accompaniments <ul style="list-style-type: none"> seasonings sugars/sweeteners prepared sauces/dressings <p>Evidence for the remaining assessment criteria may be assessed through questioning or witness testimony.</p>
Maintain counter and service areas
The assessor must assess assessment criteria 3.1–3.6 by directly observing the learner’s work.
<p>There must be performance evidence, gathered through observing the learner’s work for:</p> <ul style="list-style-type: none"> at least three from service items <ul style="list-style-type: none"> service utensils food containers/dispensers trays crockery cutlery disposable items at least two from food and drink items <ul style="list-style-type: none"> hot food cold food hot drinks cold drinks <p>Evidence for the remaining assessment criteria may be assessed through questioning or witness testimony</p>

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Be able to serve customers at the counter	<p>1.1 Give customers information that meets their needs, and promotes organisations' products and service</p> <p>1.2 Find out what customers require, and if necessary tell them about any waiting time</p> <p>1.3 Process the order promptly</p> <p>1.4 Serve food and drink items at the recommended temperature, using clean, hygienic and undamaged service equipment of the appropriate type</p> <p>1.5 Make sure there are appropriate condiments and accompaniments available for customers</p>			
2	Know how to serve customers at the counter	<p>2.1 Describe safe and hygienic working practices for serving customers and why these are important</p> <p>2.2 State why it is important to use separate serving equipment for each food item</p> <p>2.3 State why portions must be controlled when serving customers</p> <p>2.4 State why food and drink items must be served at the correct temperature</p> <p>2.5 State why information given to customers must be accurate</p> <p>2.6 Outline the types of unexpected situations that may occur when serving customers and how to deal with them</p>			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
3	Be able to maintain counter and service areas	3.1			
		3.2			
		3.3			
		3.4			
		3.5			
		3.6			
4	Know how to maintain counter and service areas	4.1			
		4.2			
		4.3			
		4.4			
		4.5			
		4.6			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	4.7 Outline the types of unexpected situations that may occur when clearing away and how to deal with them			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 47: Cash up in a retail environment

Unit reference number: L/503/5711

Level: 2

Credit value: 2

Guided learning hours: 9

Unit summary

This unit assesses the occupational competence of individuals who are responsible for cashing up in a retail environment.

Assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence. Simulation is not allowed for any performance evidence within this unit. Skillsmart Retail's Assessment Principles for Retail Qualifications can be found on their website (www.skillsmartretail.com).

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>1 Be able to cash up accurately in a retail environment</p>	<p>1.1 Cash up in line with:</p> <ul style="list-style-type: none"> the organisation's schedule for cashing up organisational procedures for cashing up <p>1.2 Follow organisational procedures for maintaining security when cashing up, including the security of:</p> <ul style="list-style-type: none"> self cash cash equivalents <p>1.3 Use cashing up equipment to reconcile takings in line with organisational and/or manufacturer's instructions</p> <p>1.4 Explain how to recognise till overages and shortages</p> <p>1.5 Deal with till overages and shortages:</p> <ul style="list-style-type: none"> in line with organisational procedures within the limits of own authority <p>1.6 Report till overages and shortages to the designated person when these are not within own authority to resolve</p>			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 48: Promote a retail store's credit card to customers in a retail environment

Unit reference number: R/503/5712

Level: 2

Credit value: 3

Guided learning hours: 12

Unit summary

This unit assesses the occupational competence of individuals who are responsible for promoting a retail store's credit card to customers.

For the purposes of this unit, a credit card is not simply a loyalty card that offers rewards such as points or discounts, although the credit card might serve as a loyalty card as well. The defining feature of a credit card is that the customer incurs a financial debt when using it to pay for purchases. This debt must eventually be paid, and can cost the customer extra money in the form of interest if payment is not made in full on the due date. If the store's card cannot be used in this way then this unit is not suitable for the learner.

Assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

Simulation is not allowed for any performance evidence within this unit.

If the assessor is unable to make judgements about the specialist skills and knowledge covered by this unit, expert witness testimony must be sought from a person with suitable current experience, to confirm the candidate's competence.

Skillsmart Retail's Assessment Principles for Retail Qualifications can be found on their website (www.skillsmartretail.com).

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Understand the importance of promoting a retail store's credit card to both potential and existing holders of the card	<p>1.1 Explain how the store can benefit from having customers who hold the store's credit card</p> <p>1.2 Explain how the store can benefit from enhancing the retail experience of existing holders of the store's credit card</p>			
2	Be able to promote a retail store's credit card to customers in a retail environment	<p>2.1 Ask potentially eligible customers if they have a credit card with the store</p> <p>2.2 Promote the benefits of the retail store's credit card to:</p> <ul style="list-style-type: none"> • potential new customers • existing card holders <p>2.3 Comply with legal requirements to disclose to customers who express an interest in having the retail store's credit card:</p> <ul style="list-style-type: none"> • the costs involved • the repayment terms • the customer's right to cancel the card <p>2.4 Address concerns customers may have about the retail store's credit card, ensuring that:</p> <ul style="list-style-type: none"> • any information provided is legally compliant • benefits of the retail store's credit card are reinforced 			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 49: Provide service to customers in a dressing room in a retail environment

Unit reference number: Y/503/5713

Level: 2

Credit value: 3

Guided learning hours: 16

Unit summary

This unit assesses the occupational competence of individuals who provide a service to customers using a dressing room in a retail environment.

Assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

Simulation is not allowed for any performance evidence within this unit.

AC 1.2: 'Politely' means demonstrating respect and consideration for other people through the use of appropriate body language, verbal language, tone of voice (or the sign language equivalent) and facial expressions.

Skillsmart Retail's Assessment Principles for Retail Qualifications can be found on their website (www.skillsmartretail.com).

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Be able to use the dressing room facilities in a retail environment to create sales opportunities	<p>1.1 Explain how to recognise customers on the sales floor who may be interested in trying on clothes</p> <p>1.2 Welcome customers politely when they approach the dressing room</p> <p>1.3 Tell customers how to get further help before leaving them to try on clothes</p> <p>1.4 Monitor the dressing room to ensure that customers are not kept waiting unduly to try on clothes</p> <p>1.5 Suggest to dressing room customers any matching items, accessories or promotional offers that may be of interest to them</p>			
2	Be able to take measures to minimise stock loss while serving customers in a dressing room in a retail environment	<p>2.1 Perform checks to ensure that the number of items of stock each customer takes into the dressing room does not exceed the organisation's allowance</p> <p>2.2 Control the number of items of stock taken into the dressing room in ways that attempt to maintain goodwill</p> <p>2.3 Perform checks to ensure that customers bring out of the dressing room all the items that were taken in</p> <p>2.4 Follow organisational procedures for reporting suspected or actual loss of stock from the dressing room</p>			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
3	Be able to keep dressing room facilities in a retail environment ready for customer use	3.1 Perform checks before opening the dressing room for use to ensure that it: <ul style="list-style-type: none"> • meets organisational requirements • is free from obstructions 			
		3.2 Maintain the dressing room in a state that meets organisational requirements when the dressing room is open for use			
4	Be able to process unsold merchandise in a dressing room in a retail environment	4.1 Place merchandise in the designated area in the dressing room when it cannot be immediately returned to the shop floor			
		4.2 Make adjustments where necessary to ensure merchandise is in the required condition for display before it is returned to the shop floor			
		4.3 Dispose of merchandise that is no longer of saleable quality in line with organisational procedures			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 50: Promote food or drink products by offering samples to customers

Unit reference number: D/503/5714

Level: 2

Credit value: 2

Guided learning hours: 13

Unit summary

This unit assesses the occupational competence of individuals who are responsible for promoting food or drink products by offering samples to customers.

Assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

Simulation is not allowed for any performance evidence within this unit.

Skillsmart Retail's Assessment Principles for Retail Qualifications can be found on their website (www.skillsmartretail.com).

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Understand the business reasons for offering samples of food or drink to customers	<p>1.1 Explain how giving customers the opportunity to sample products can help to increase sales</p> <p>1.2 Explain how to recognise opportunities to:</p> <ul style="list-style-type: none"> display samples encourage individual customers to sample products <p>1.3 Explain the criteria to be applied when selecting products for sampling, including product type and sell-by date</p>			
2	Be able to set up attractive and hygienic displays of food or drink samples	<p>2.1 Describe the required temperatures for safely storing and serving samples of food or drink</p> <p>2.2 Prepare samples of food or drink in line with:</p> <ul style="list-style-type: none"> food safety requirements organisational procedures for preparing and displaying samples 			
3	Be able to interact with customers at a display of food or drink samples	<p>3.1 Provide customers with information about any potentially allergenic ingredients in the food or drink samples being offered</p> <p>3.2 Use words and body language in ways that attempt to encourage customers to sample and purchase food or drink products being offered</p> <p>3.3 Describe to customers where in the store the sampled products can be purchased</p>			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
4	Be able to dispose of food or drink samples in line with organisational procedures	4.1 Monitor the freshness of food or drink samples on display			
		4.2 Remove samples from the display when they no longer meet organisational requirements for freshness			
		4.3 Dispose of waste products in line with: <ul style="list-style-type: none"> organisational procedures organisational recycling requirements food safety requirements 			
		4.4 Record food disposals in line with legal and organisational requirements			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 51: Deliver goods from a retail environment to the customer's delivery address

Unit reference number: H/503/5715

Level: 2

Credit value: 3

Guided learning hours: 17

Unit summary

This unit assesses the occupational competence of individuals who deliver goods from a retail environment to customers' delivery addresses.

Assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

Simulation is not allowed for any performance evidence within this unit.

For the purposes of this unit, the 'customer' can be the person who placed the order, or someone receiving it on their behalf.

AC 4.1: 'Polite' means demonstrating respect and consideration for other people through the use of appropriate body language, verbal language, tone of voice (or the sign language equivalent) and facial expressions.

Skillsmart Retail's Assessment Principles for Retail Qualifications can be found on their website (www.skillsmartretail.com).

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Understand the role of the delivery person in promoting a positive impression of the retail organisation	<p>1.1 Explain the importance of delivering products at the times agreed with customers whenever possible</p> <p>1.2 Explain the importance of keeping customers informed when the agreed delivery time cannot be achieved</p> <p>1.3 Explain the importance of giving customers, and others, a positive impression of the organisation when making deliveries</p>			
2	Be able to prepare to deliver goods from a retail environment to customers' delivery addresses	<p>2.1 Explain the benefits to the business and to the environment of planning an efficient delivery schedule</p> <p>2.2 Schedule deliveries in line with organisational procedures</p> <p>2.3 Perform checks to ensure that everything needed for the delivery schedule is available</p> <p>2.4 Perform checks to find out if there is enough fuel in the vehicle for the planned delivery schedule</p> <p>2.5 Obtain fuel for the delivery vehicle in line with organisational procedures</p>			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
3	Be able to convey goods from a retail environment to customers' delivery addresses	<p>3.1 Drive from a retail environment to customers' delivery addresses:</p> <ul style="list-style-type: none"> • without injury to self and others • without damage to the goods and property • arriving at the times agreed with customers <p>3.2 Contact customers to make alternative arrangements when deliveries cannot be made at the times agreed with customers</p> <p>3.3 Unload goods at customers' delivery addresses:</p> <ul style="list-style-type: none"> • in line with organisational procedures • without injury to self and others • without damage to the goods and property 			
4	Be able to complete deliveries of goods at customers' delivery addresses	<p>4.1 Deliver goods to customers in a polite manner</p> <p>4.2 Leave deliveries only with individuals who can legally receive them</p> <p>4.3 Follow organisational procedures for dealing with goods that cannot be delivered</p> <p>4.4 Update records of delivery and non-delivery in line with organisational procedures</p>			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 52: Contribute to monitoring and maintaining ease of shopping in a retail sales area

Unit reference number: K/503/5716

Level: 1

Credit value: 2

Guided learning hours: 8

Unit summary

This unit assesses the occupational competence of individuals who are responsible for keeping an area of the sales floor fit for customers to shop in, while the store is open.

Assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

Simulation is not allowed for any performance evidence within this unit.

Skillsmart Retail's Assessment Principles for Retail Qualifications can be found on their website (www.skillsmartretail.com).

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Know how the layout and appearance of the sales floor influences sales	1.1 State how the layout and appearance of the sales floor influence sales			
2	Be able to maintain own area of the sales floor during trading hours	2.1 Keep own work area clean, tidy and free from obstructions 2.2 Ensure that merchandise meets organisational standards for positioning and presentation 2.3 Remove unsaleable merchandise from the sales floor 2.4 Ensure that information concerning prices, products and promotions is visible to customers 2.5 Ensure that own activities on the sales floor minimise disruption to customers			
3	Be able to report problems that could have a negative effect on the customer experience	3.1 Report to the designated person problems that could have a negative effect on the customer experience			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 53: **Help customers to apply for a retail store's credit card and associated insurance products**

Unit reference number: M/503/5717

Level: 2

Credit value: 4

Guided learning hours: 22

Unit summary

This unit assesses the occupational competence of individuals who work in a retail store and who are responsible for helping customers to apply for the store's credit card and associated insurance products.

For the purposes of this unit, a credit card is not simply a loyalty card that offers rewards such as points or discounts, although the credit card might serve as a loyalty card as well. The defining feature of a credit card is that the customer incurs a financial debt when using it to pay for purchases. This debt must eventually be paid, and can cost the customer extra money in the form of interest if payment is not made in full on the due date. If the store's card cannot be used in this way then this unit is not suitable for the learner.

Assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

Simulation is not allowed for any performance evidence within this unit.

If the assessor is unable to make judgements about the specialist skills and knowledge covered by this unit, expert witness testimony must be sought from a person with suitable current experience, to confirm the candidate's competence.

Skillsmart Retail's Assessment Principles for Retail Qualifications can be found on their website (www.skillsmartretail.com).

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Understand the legal requirements relating to informing customers about insurance products associated with a retail store's credit card	<p>1.1 Explain the difference between informing and advising customers about insurance products</p> <p>1.2 Explain why it is not within own limits of authority to provide advice to customers about insurance products</p> <p>1.3 Explain the legal requirements for offering customers the opportunity to read the insurance policy summary</p>			
2	Understand the importance of helping customers to understand the implications of applying for a retail store's credit card and associated insurance products	<p>2.1 Explain how customers can benefit from reading the policy summary for an insurance product associated with the retail store's credit card</p> <p>2.2 Explain why customers may take credit card and insurance application forms away to study in detail</p> <p>2.3 Explain why blank application forms must be voided before being given to the customer to take away</p>			
3	Understand the legal requirements relating to helping customers to apply for the store's credit card and associated insurance products	<p>3.1 Explain the legal requirements for giving customers information about the process of applying for the store's credit card and associated insurance products</p> <p>3.2 Explain why customers must provide proof of identity when applying for the store's credit card and associated insurance products</p>			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
		3.3 Explain why customers' personal data must be kept secure during the process of applying for the store's credit card and associated insurance products 3.4 Explain the importance of not speculating with customers on possible reasons why their applications for the store's credit card have been declined			
4	Be able to offer customers insurance products associated with the store's credit card	4.1 Tell customers about the features of the insurance being applied for in ways that: <ul style="list-style-type: none"> • use legally compliant wording • are factually correct • are unbiased 4.2 Tell customers: <ul style="list-style-type: none"> • whether the insurance is optional • the cost of the insurance • the type and extent of the cover available • any significant and unusual exclusions • their right to cancel the insurance 4.3 Tell customers about the benefits of reading the insurance policy summary 4.4 Allow sufficient time for customers to read the insurance policy summary should they wish to do so			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	<p>4.5 Perform checks to ensure that customers are eligible for the insurance they wish to apply for</p> <p>4.6 Inform customers who ask for advice about an insurance product:</p> <ul style="list-style-type: none"> • that it is not within own authority to provide such advice • who the customer can contact for such advice <p>4.7 Ask customers questions to ensure that they understand information about the insurance product they have applied for</p>			
<p>5 Be able to help customers to apply for a retail store's credit card and associated insurance products</p>	<p>5.1 Comply with relevant legal requirements when giving customers information about the process of applying for the retail store's credit card and associated insurance products</p> <p>5.2 Provide customers with voided blank application forms on request to take away to consider, ensuring that customers are told that they are welcome to do this</p> <p>5.3 Perform checks to ensure that the customer's identity has been proved</p> <p>5.4 Follow organisational requirements to keep customer's personal data secure throughout the application process</p> <p>5.5 Process applications in line with the procedures agreed between the store and the insurer</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	<p>5.6 Tell customers whose applications have been accepted:</p> <ul style="list-style-type: none"> • their credit limit • the Annual Percentage Rate (APR) that applies <p>5.7 Follow organisational procedures to enable customer accounts to be set up</p> <p>5.8 Tell customers whose applications have not been accepted:</p> <ul style="list-style-type: none"> • in line with organisational procedures • without speculating with the customer on the reasons for the refusal <p>5.9 Follow organisational procedures when technical problems arise with the application system or equipment</p>			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 54: Help customers to choose delicatessen products in a retail environment

Unit reference number: T/503/5718

Level: 2

Credit value: 3

Guided learning hours: 15

Unit summary

This unit assesses the occupational competence of individuals who work on a delicatessen counter and who are responsible for helping customers to choose products from the counter.

Assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

Simulation is not allowed for any performance evidence within this unit.

If the assessor is unable to make judgements about the specialist skills and knowledge covered by this unit, expert witness testimony must be sought from a person with suitable current experience, to confirm the learners' competence.

AC 2.2: 'Politely' means demonstrating respect and consideration for other people through the use of appropriate body language, verbal language, tone of voice (or the sign language equivalent) and facial expressions.

Skillsmart Retail's Assessment Principles for Retail Qualifications can be found on their website (www.skillsmartretail.com).

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Be able to find out what customers are looking for at the delicatessen counter	1.1 Communicate with customers at the delicatessen counter in ways that: <ul style="list-style-type: none"> • attempt to establish a rapport with them • find out what they are looking for 			
2	Be able to suggest delicatessen products that meet customer needs	2.1 Match delicatessen products as closely as possible to customers' stated requirements, from the products available 2.2 Suggest, politely, possible alternative portion sizes or products when customer requests for delicatessen products are impractical 2.3 Provide customers with information about delicatessen products that is factually correct 2.4 Explain the differences between delicatessen products in ways that attempt to help customers to choose the products that best meet their requirements 2.5 Recommend associated or additional products to the customer at the delicatessen counter			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 55: Portion delicatessen products to meet customer requirements in a retail environment

Unit reference number: A/503/5719

Level: 2

Credit value: 2

Guided learning hours: 9

Unit summary

This unit assesses the occupational competence of individuals who work on a delicatessen counter and who are responsible for portioning products to meet customer requirements.

Assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

Simulation is not allowed for any performance evidence within this unit.

If the assessor is unable to make judgements about the specialist skills and knowledge covered by this unit, expert witness testimony must be sought from a person with suitable current experience, to confirm the learners' competence.

Skillsmart Retail's Assessment Principles for Retail Qualifications can be found on their website (www.skillsmartretail.com).

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Be able to cut and weigh delicatessen products to meet customer requirements	<p>1.1 Explain the importance of using tools and utensils suited to the delicatessen products</p> <p>1.2 Cut delicatessen products in ways that:</p> <ul style="list-style-type: none"> • produce the required portion size and shape • attempt to maintain the attractiveness of the remaining product where possible • minimise waste • comply with relevant health and safety requirements <p>1.3 Weigh delicatessen products accurately, taking into account the weight of any additional items on the scales such as containers</p>			
2	Be able to wrap or package portioned delicatessen products for customers	<p>2.1 Ask customers if they are satisfied with portioned products before wrapping or packaging them</p> <p>2.2 Wrap or package portioned products using materials or containers suited to the product</p>			
3	Be able to maintain the display of a delicatessen counter	<p>3.1 Restore products from which portions have been taken to a presentable condition</p> <p>3.2 Remove from display products from which portions have been taken when the product is no longer saleable</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	3.3 Replenish the delicatessen display with replacement products, when these are both required and available 3.4 dispose of any unsaleable products in line with relevant: <ul style="list-style-type: none"> • health and safety requirements • food safety requirements 			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____
(if sampled)

Date: _____

Unit 56: Merchandise plants and other relevant products

Unit reference number: J/502/0771

Level: 2

Credit value: 6

Guided learning hours: 45

Unit summary

This unit comes from the land-based and environmental sector. It is included as an option within the retail skills qualifications for learners who work in garden centres.

Assessment requirements/evidence requirements

The following assessment guidance is provided by Lantra, the unit owner:

Simulation will not be acceptable where the unit is included in qualifications which verify competent performance.

Please refer to Lantra's Assessment Strategy for further guidance.

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Know how to merchandise plants and other products	1.1			
		Outline how to present plants and relevant products (eg growing media, containers, plant feed etc) for best effect			
		1.2			
		Explain the importance of location and hot and cold spots			
		1.3			
		Describe the different ways plants are sold, eg root wrap and containers			
		1.4			
2	Be able to merchandise plants and other products	Outline the merchandising systems of display			
		1.5			
		Describe how other sales can be linked to plant purchases			
		1.6			
		Outline the principles of stock rotation			
		1.7			
		Outline the value of point of sale material and the range available			
		2.1			
		Display plants and relevant products (eg growing media, containers, plant feed etc.) effectively to maximise sales			
		2.2			
		Use point of sale materials and labels effectively			
		2.3			
		Promote linked sales			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
3	Know how to maintain the condition of plants for sale	3.1 Explain how to check and maintain the condition of plants and products covering the following types of plants: <ul style="list-style-type: none"> • trees and shrubs • bedding plants • herbaceous perennials • bulbs 			
		3.2 Describe the appropriate method of reporting signs of pests, diseases or other disorders			
4	Be able to maintain plants ready for use	4.1 Maintain optimum conditions for the plants as far as possible within the available facilities			
		4.2 Provide any necessary supplies of food and water to maintain the condition of the plants and remove weeds and suckers			
		4.3 Check the condition of plants and relevant products to maintain their saleable value			
		4.4 Identify any plants or products that should be removed and take the appropriate action			
		4.5 Report signs of pests, disease or other disorders to the appropriate person			
		4.6 Care for incoming plants and implement an appropriate stock rotation plan			
		4.7 Monitor the development of new plants against the stock rotation plan and take the appropriate action if there are any problems			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 57: Demonstrate makeup and skincare products to customers at a beauty counter in a retail environment

Unit reference number: T/503/5721

Level: 2

Credit value: 4

Guided learning hours: 15

Unit summary

This unit assesses the occupational competence of individuals who work on the beauty counter in a retail environment and who apply makeup or skincare products to customers for the purpose of demonstrating, promoting and selling them.

Assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

Simulation is not allowed for any performance evidence within this unit.

If the assessor is unable to make judgements about the specialist skills and knowledge covered by this unit, expert witness testimony must be sought from a person with suitable current experience, to confirm the learners' competence.

The evidence should take into account the training provided by the cosmetic house that the learner is working for where this occurs.

Skillsmart Retail's Assessment Principles for Retail Qualifications can be found on their website (www.skillsmartretail.com).

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Understand the commercial value of demonstrating makeup and skincare products	1.1 Explain the purpose and value of demonstrations in promoting and selling makeup and skincare products			
2	Understand the elements of a demonstration of makeup and skincare products	2.1 Explain how own personal hygiene and grooming contribute to making the demonstration a pleasant experience for customers 2.2 Explain the importance of gaining the customer's permission for a demonstration 2.3 Explain the difference between 'features' and 'benefits' of products 2.4 Explain the importance of communicating features and benefits to the customer when demonstrating and applying makeup and skincare products 2.5 Explain the importance of organising demonstrations of makeup and skincare products into a series of logical steps 2.6 Explain the importance of clearing away products and equipment after demonstrating makeup and skincare products			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
3	Be able to prepare to demonstrate makeup and skincare products to customers at a beauty counter in a retail environment	3.1 Ask customers' permission to carry out a demonstration 3.2 Ask customers if they have enough time for a demonstration 3.3 Tell customers which products are going to be applied and why 3.4 Ask customers if they are allergic to any products or ingredients 3.5 Perform checks to ensure that all the necessary products, tools and materials are to hand 3.6 Perform checks to ensure that any products, tools or materials being used do not include anything to which the customer is allergic 3.7 Protect customers' hair and clothing from coming into contact with the products that will be demonstrated			
4	Be able to apply makeup or skincare products to customers as part of a demonstration	4.1 Apply makeup or skincare products to customers: <ul style="list-style-type: none"> • in a logical sequence • using tools and materials that are suited to the task • following organisational procedures for hygienic application • within the time agreed with the customer 			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
		4.2 describe to customers the makeup or skincare products being demonstrated, focusing on the product features and benefits			
5	Be able to conclude a demonstration of makeup or skincare products	5.1 ask customers questions to determine whether they are satisfied with the results of the makeup or skincare demonstration by: <ul style="list-style-type: none"> • providing opportunities for customers to look in a mirror at the end of the demonstration, taking into consideration the lighting and angle of the mirror • asking customers whether they want any adjustments to be made to the products that have been applied 5.2 clear away equipment and products at the end of the makeup or skincare demonstration in line with organisational procedures without keeping customers waiting unduly			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 58: Operate a customer record card system on a beauty counter in a retail environment

Unit reference number: A/503/5722

Level: 2

Credit value: 2

Guided learning hours: 8

Unit summary

This unit assesses the occupational competence of individuals who work on a beauty counter in a retail environment and are responsible for maintaining and using a customer record card system to identify opportunities for increasing sales.

Assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

Simulation is not allowed for any performance evidence within this unit.

If the assessor is unable to make judgements about the specialist skills and knowledge covered by this unit, expert witness testimony must be sought from a person with suitable current experience, to confirm the learners' competence.

Skillsmart Retail's Assessment Principles for Retail Qualifications can be found on their website (www.skillsmartretail.com).

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Understand how to maintain the customer record card system in a retail environment	<p>1.1 Explain how using a customer record card system can help to meet own sales targets</p> <p>1.2 Explain the benefits to the customer of the record card system</p> <p>1.3 Explain the importance of updating the record card system regularly</p> <p>1.4 Explain how to find time in own working day to update the record card system</p> <p>1.5 Explain the relevant aspects of current data protection legislation when maintaining a customer record card system</p> <p>1.6 Explain the implications of complying with data protection legislation when maintaining a customer record card system</p> <p>1.7 Explain the importance of asking customers about any allergies to products and ingredients so that these can be noted on the record card</p>			
2	Be able to set up record cards for customers at a beauty counter in a retail environment	<p>2.1 Ask customers whether a record card may be set up for them at the beauty counter</p> <p>2.2 Describe to customers the benefits of being on file at the beauty counter</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	<p>2.3 Offer customers the opportunity to make an appointment for a return visit to the beauty counter, when setting up a record card</p> <p>2.4 Complete record cards with customer details, ensuring that the information:</p> <ul style="list-style-type: none"> • is completed in line with organisational procedures • is an accurate record of the information provided by the customer • includes details of any allergies to beauty products or ingredients, where the customer is willing and able to give this information • includes a note of any products in the current range that are unsuitable for the customer, as far as can be determined from the information provided by the customer • is stored and used in compliance with legal regulations relating to customer data 			
<p>3 Be able to use the record card system to recognise opportunities for increasing sales at a beauty counter in a retail environment</p>	<p>3.1 Update the information in the record card system regularly enough to maintain the system's usefulness as a sales tool</p> <p>3.2 Identify the counter's highest spending customers, from the record card system, to receive priority information about special offers and promotions</p>			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 59: Give customers a positive impression of yourself and your organisation

Unit reference number: L/601/0933

Level: 2

Credit value: 5

Guided learning hours: 33

Unit summary

This unit is a cross-sector customer service unit owned by CfA Business Skills @ Work.

Assessment requirements/evidence requirements

Assessment guidance for this unit is provided in the CfA Business Skills @ Work Assessment Strategy, for customer service qualifications which can be found on their website: www.cfa.uk.com. The evidence requirements are given below and can also be found on the website.

Give customers a positive impression of yourself and your organisation

- 1 Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this Unit, evidence collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this Unit. (*Guidelines for a Realistic Working Environment can be found in the Assessment Strategy for Customer Service at S/NVQ Levels 1,2,3 and 4 – February 2010*)
- 2 You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
- 3 You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
- 4 Your communication with customers may be face to face, in writing, by telephone, text message, email, internet (including social networking), intranet or by any other method you would be expected to use within your job role.

- 5 You must provide evidence of creating a positive impression with customers:
 - a during routine delivery of customer service
 - b during a busy time in your job
 - c during a quiet time in your job
 - d when people, systems or resources have let you down.
- 6 You must provide evidence that you communicate with customers effectively by:
 - a using appropriate spoken or written language
 - b applying the conventions and rules appropriate to the method of communication you have chosen.

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Establish rapport with customers	1.1 Meet their organisation's standards of appearance and behaviour			
		1.2 Greet their customer respectfully and in a friendly manner			
		1.3 Communicate with their customer in a way that makes them feel valued and respected			
		1.4 Identify and confirm their customer's expectations			
		1.5 Treat their customer courteously and helpfully at all times			
		1.6 Keep their customer informed and reassured			
		1.7 Adapt their behaviour to respond to different customer behaviour			
2	Respond appropriately to customers	2.1 Respond promptly to a customer seeking help			
		2.2 Choose the most appropriate way to communicate with their customer			
		2.3 Check with their customer that they have fully understood their expectations			
		2.4 Respond promptly and positively to their customer's questions and comments			
		2.5 Allow their customer time to consider their response and give further explanation when appropriate			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
3	Communicate information to customers	3.1 Quickly find information that will help their customer			
		3.2 Give their customer information they need about the services or products offered by their organisation			
		3.3 Recognise information that their customer might find complicated and check whether they fully understand			
		3.4 Explain clearly to their customers any reasons why their expectations cannot be met			
4	Understand how to give customers a positive impression of themselves and the organisation	4.1 Describe their organisation's standards for appearance and behaviour			
		4.2 Explain their organisation's guidelines for how to recognise what their customer wants and respond appropriately			
		4.3 Identify their organisation's rules and procedures regarding the methods of communication they use			
		4.4 Explain how to recognise when a customer is angry or confused			
		4.5 Identify their organisation's standards for timelines in responding to customer questions and requests for information			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 60: Recognise and report security risks in a retail environment

Unit reference number: F/503/5723

Level: 1

Credit value: 4

Guided learning hours: 26

Unit summary

This unit assesses the occupational competence of individuals who work in a retail environment and who are not security specialists, but who are responsible for recognising and reporting any security risks they encounter during their day-to-day work.

Assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

It is expected that simulation will be used to gather evidence for reporting security risks.

Skillsmart Retail's Assessment Principles for Retail Qualifications can be found on their website (www.skillsmartretail.com).

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Know why it is important to keep own work area secure	1.1 Outline what can happen, to people and to the organisation, if own work area is not kept secure 1.2 State the importance of reporting security risks promptly			
2	Know security risks associated with a retail environment	2.1 Outline security risks that can arise in a retail environment 2.2 Identify situations that can lead to reduced alertness for security risks			
3	Be able to report security risks in a retail environment	3.1 Identify potential security risks in own workplace 3.2 Report security risks to the designated person 3.3 Outline the importance of not exceeding own level of authority when faced with security risks			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 61: Comply with workplace health and safety requirements in a retail environment

Unit reference number: J/503/5724

Level: 1

Credit value: 5

Guided learning hours: 28

Unit summary

This unit assesses occupational competence in relation to the basic health and safety procedures that apply in a retail environment.

Assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

It is expected that simulation will be used to gather evidence for the demonstration of procedures for accidents and emergencies. Simulation is also allowed for the remaining performance evidence within this unit, but only if no opportunities exist to gather workplace evidence.

This unit can be assessed independently of other units. However, it may be possible to generate some of the evidence for this unit holistically when gathering evidence for other units in the same qualification.

Skillsmart Retail's Assessment Principles for Retail Qualifications can be found on their website (www.skillsmartretail.com).

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Know types and causes of accidents and emergencies in a retail environment	<p>1.1 Identify types of accidents and emergencies that can arise in a retail environment</p> <p>1.2 Outline causes of accidents and emergencies that can arise in a retail environment</p>			
2	Know how own behaviour contributes to health and safety in a retail environment	<p>2.1 State the importance of acting within the limits of own responsibility and authority when accidents and emergencies arise, including reasons relating to personal safety and legal requirements</p> <p>2.2 State the importance of following health and safety procedures</p> <p>2.3 State the importance of planning the route before moving goods</p> <p>2.4 Outline the importance of using safe techniques for lifting and handling in relation to:</p> <ul style="list-style-type: none"> • own safety • the safety of others who are helping with lifting • the safety of others who are close by <p>2.5 State when it is necessary to ask others for help with lifting</p>			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
3	Be able to follow organisational procedures in the event of accidents and emergencies in a retail environment	3.1 Identify potential situations that constitute accidents and emergencies 3.2 Seek immediate help from an appropriate source in the event of accidents and emergencies 3.3 Follow immediately instructions given by senior staff and/or the emergency services in relation to accidents and emergencies			
4	Be able to work safely in own role within a retail environment	4.1 Carry out own work duties in line with: <ul style="list-style-type: none"> organisational procedures for reducing health and safety risks legal requirements for reducing health and safety risks 4.2 Use safety equipment in line with the manufacturer's instructions 4.3 Identify the person who can provide advice about working safely			
5	Be able to lift and handle goods safely in a retail environment	5.1 Lift and handle goods: <ul style="list-style-type: none"> using organisational procedures for lifting and handling goods using any lifting and handling equipment in line with the organisation's and/or manufacturer's guidelines checking that any equipment to be used is in working order asking others to help when necessary 			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 62: Work effectively in a retail team

Unit reference number: L/503/5725

Level: 1

Credit value: 7

Guided learning hours: 35

Unit summary

This unit assesses the occupational competence of individuals working in a retail environment, who are expected to work as part of a team. This includes being able to follow a work training programme.

For the purposes of this unit, the 'team' could be just the learner and their manager.

Assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

Simulation is allowed for the performance evidence within this unit only if no opportunities exist to gather workplace evidence.

This unit can be assessed independently of other units. However, it may be possible to generate some of the evidence for this unit holistically when gathering evidence for other units in the same qualification.

AC 2.2: 'Politely' means demonstrating respect and consideration for other people through the use of appropriate body language, verbal language, tone of voice (or the sign language equivalent) and facial expressions.

Skillsmart Retail's Assessment Principles for Retail Qualifications can be found on their website (www.skillsmartretail.com).

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Know about discrimination, bullying and harassment in own workplace	<p>1.1 Outline how own employer defines discrimination, bullying and harassment</p> <p>1.2 Outline own employer's procedures for dealing with discrimination, bullying and harassment</p>			
2	Be able to work as part of a retail team	<p>2.1 State the importance of asking for help and information from colleagues when needed</p> <p>2.2 Ask colleagues politely for the help and information needed to do own work</p> <p>2.3 State the importance of responding positively whenever possible to colleagues' requests for help</p> <p>2.4 Respond to colleagues' requests for help and information:</p> <ul style="list-style-type: none"> • when own workload allows • within the limits of own responsibility • in ways that attempt to maintain working relationships <p>2.5 Identify the people who can provide advice if working with colleagues proves to be difficult</p> <p>2.6 State the importance of always following organisational instructions for safeguarding own and others' health and safety at work</p> <p>2.7 Follow organisational instructions for safeguarding own and others' health and safety at work</p>			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
3	Know how to follow plans and procedures for learning to do own job	3.1	State the importance of being an effective learner at work		
		3.2	State the importance of planning own learning, including the use of action points and deadlines		
		3.3	State the importance of requesting help to resolve problems with own training		
		3.4	Identify the learning activities to be undertaken, including the specific action points and deadlines in own training programme		
		3.5	Identify the people who can be approached for help with any problems relating to own training programme		

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 63: Keep the non-food retail environment clean and tidy

Unit reference number: R/503/5726

Level: 1

Credit value: 3

Guided learning hours: 16

Unit summary

This unit assesses the occupational competence of individuals who carry out basic cleaning of work surfaces in a non-food retail environment. The unit is suitable only for contexts where food is not stored or prepared, even if the food is wrapped.

Assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

Simulation is allowed for the performance evidence within this unit only if no opportunities exist to gather workplace evidence.

Skillsmart Retail's Assessment Principles for Retail Qualifications can be found on their website (www.skillsmartretail.com).

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Know about health and safety aspects of cleaning and tidying work surfaces in a non-food retail environment	<p>1.1 Identify potential health and safety risks posed by:</p> <ul style="list-style-type: none"> • cleaning equipment and materials, both in use and in storage • spillages • litter and waste <p>1.2 Outline the health and safety legislation relating to routine cleaning of a non-food retail environment, including dealing with spillages and disposing of waste and litter</p>			
2	Know the importance of cleaning with consideration for others in a non-food retail environment	2.1 State the importance of minimising disturbance to other people when cleaning a non-food retail environment			
3	Know the importance of personal hygiene and tidiness in a non-food retail environment	<p>3.1 State the importance of maintaining personal hygiene in a non-food retail environment</p> <p>3.2 State how a clean and tidy appearance can help to give customers a positive impression of self and the organisation</p>			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
4	Be able to clean and tidy work surfaces in a non-food retail environment	4.1 Use equipment and materials to clean and tidy work surfaces in a non-food retail environment in line with organisational procedures			
		4.2 Follow organisational procedures for safe working practices while cleaning and tidying work surfaces in a non-food retail environment including: <ul style="list-style-type: none"> positioning items so that they do not constitute a hazard keeping the risk of spillages to a minimum cleaning up any spillages disposing of rubbish and waste safely 			
		4.3 Clean work surfaces in ways that attempt to minimise disturbance to other people			
		4.4 Perform checks to ensure that work surfaces are thoroughly clean			
		4.5 Store cleaning equipment and materials in line with organisational procedures when cleaning is finished			
		4.6 Dispose of used cleaning products in line with organisational procedures			
5	Be able to maintain own personal hygiene in a non-food retail environment	5.1 Use protective clothing for performing own duties in line with organisational procedures			
		5.2 Keep own hair, skin and nails clean for performing own duties			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 64: Protect own and others' health and safety when working in a retail environment

Unit reference number: Y/503/5727

Level: 2

Credit value: 5

Guided learning hours: 28

Unit summary

This unit assesses occupational competence in relation to taking responsibility for own and colleagues' health and safety, within set limits, when working in a retail environment.

Assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

It is expected that simulation will be used to gather evidence for the demonstration of procedures for accidents and emergencies. Evidence of competence in following evacuation procedures will take account of specific training in these procedures.

This unit can be assessed independently of other units. However, it may be possible to generate some of the evidence for this unit holistically when gathering evidence for other units in the same qualification.

Skillsmart Retail's Assessment Principles for Retail Qualifications can be found on their website (www.skillsmartretail.com).

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Understand how to promote health and safety in own workplace	<p>1.1 Explain how setting a good example to others can contribute to health and safety in the workplace</p> <p>1.2 Explain how communicating and behaving in a calm way can help to promote safety during emergency situations</p>			
2	Understand own role in protecting own and others' health and safety	<p>2.1 Explain how reporting accidents and emergencies promptly can help promote health and safety</p> <p>2.2 Explain the importance of not exceeding the limits of own responsibility and authority when dealing with health and safety risks</p> <p>2.3 Explain the importance of using equipment and materials in line with the manufacturer's instructions</p>			
3	Be able to deal with accidents and emergencies in a retail environment	<p>3.1 Respond to accidents and emergencies:</p> <ul style="list-style-type: none"> • in line with organisational procedures • in line with legal requirements • in a calm manner <p>3.2 Seek immediate help from an appropriate source in the event of accidents and emergencies</p> <p>3.3 Follow organisational procedures for evacuation when an alarm is raised</p>			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
4	Be able to protect own and others' health and safety during day-to-day work activities	4.1 Follow organisational health and safety requirements when carrying out own work duties 4.2 Deal with health and safety risks within the limits of own authority 4.3 Report immediately to the designated person any health and safety risks that are beyond the limits of own authority to deal with 4.4 Use equipment and materials needed for own work in line with the organisation's and/or manufacturer's instructions			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 65: Reduce security risks in a retail environment

Unit reference number: D/503/5728

Level: 2

Credit value: 5

Guided learning hours: 25

Unit summary

This unit assesses the occupational competence of individuals who work in a retail environment and who are not security specialists, but who are required to contribute to reducing security risks as far as practicable during their day-to-day work.

Assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

It is expected that simulation will be used to gather evidence for taking action to reduce and report security risks and to protect own personal safety when security risks arise. Workplace evidence for the remainder of the unit can be generated either in isolation from other units or holistically with evidence for other units.

AC 2.2: If the organisation does not have a written policy, learners need to ask their manager for broad guidelines and follow these where the unit refers to a policy.

Skillsmart Retail's Assessment Principles for Retail Qualifications can be found on their website (www.skillsmartretail.com).

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Know about security risks that can arise in a retail environment	1.1 Identify potential security risks that can arise in a retail environment			
2	Be able to reduce security risks in a retail environment	2.1 Describe own level of responsibility for dealing with security risks, including the relevant legal rights and duties 2.2 Take action to reduce security risks within the limits of: <ul style="list-style-type: none"> • relevant legislation • organisational policy • own level of authority 2.3 Report security risks that are beyond own level of authority to the designated person 2.4 Use organisational procedures for protecting own personal safety when security risks arise 2.5 Ensure that own work area is secure before leaving it			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 66: Prepare newspapers and magazines for return to merchandisers

Unit reference number: A/503/5736

Level: 2

Credit value: 2

Guided learning hours: 10

Unit summary

This unit assesses the occupational competence of individuals who are responsible for preparing unsold newspapers and magazines for return to merchandisers.

For the purposes of this unit, 'merchandiser' may be an external supplier or the organisation's own distribution service.

Assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

Simulation is not allowed for any performance evidence within this unit.

Skillsmart Retail's Assessment Principles for Retail Qualifications can be found on their website (www.skillsmartretail.com).

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Be able to plan own work to prepare newspapers and magazines for return to merchandisers	1.1 Plan sufficient time to prepare returns of newspapers and magazines by the agreed collection time			
2	Be able to gather together newspapers and magazines for return to merchandisers	2.1 Identify newspapers and magazines that need returning to merchandisers 2.2 stack returns in line with organisational procedures			
3	Be able to prepare batches of newspapers and magazines for return to merchandisers	3.1 Wrap returns in line with organisational procedures 3.2 Label returns in line with organisational procedures 3.3 Place returns: <ul style="list-style-type: none"> • in the designated location ready for collection • in line with organisational safety procedures for lifting and moving 			
4	Be able to complete the administration associated with magazine and newspaper returns	4.1 Complete returns records accurately and in line with organisational procedures 4.2 File returns in accordance with the filing system provided by the organisation 4.3 Follow organisational procedures for dealing with missed and uncollected returns			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 67: Check the accuracy of records of hours worked by staff in a retail environment

Unit reference number: J/503/5738

Level: 2

Credit value: 4

Guided learning hours: 17

Unit summary

This unit assesses the occupational competence of individuals who process information concerning the number of hours worked by staff in a retail environment. This unit is not aimed at payroll specialists.

Assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

Simulation is not allowed for any performance evidence within this unit.

AC 4.2: 'Politely' means demonstrating respect and consideration for other people through the use of appropriate body language, verbal language, tone of voice (or the sign language equivalent) and facial expressions.

Skillsmart Retail's Assessment Principles for Retail Qualifications can be found on their website (www.skillsmartretail.com).

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Understand the importance of maintaining accurate records of the hours worked by staff in a retail environment	<p>1.1 Explain the importance of keeping accurate records of the number of hours worked by staff in a retail environment</p> <p>1.2 Explain types of discrepancies that can arise in the records of hours worked by staff</p> <p>1.3 Explain possible consequences of not identifying discrepancies in the records of hours worked by staff</p> <p>1.4 Explain the importance of identifying and reporting recurring inaccuracies in information about the number of hours worked by staff</p>			
2	Understand the level of service that needs to be provided to colleagues in relation to records of the number of hours they have worked	<p>2.1 Explain what it means to treat colleagues as 'internal customers'</p> <p>2.2 Explain the importance of treating colleagues as internal customers</p> <p>2.3 Explain what is meant by 'personal data' in relation to records of the number of hours worked by staff</p> <p>2.4 Explain the importance of keeping personal data confidential in relation to records of the number of hours worked by staff</p>			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
3	Be able to check the accuracy of records of hours worked by staff in a retail environment	3.1			
		3.2			
		3.3			
		3.4			
		3.5			
		3.6			
4	Be able to provide information about the number of hours worked by staff in a retail environment	4.1			
		4.2			

- accurately
- politely

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	<p>4.3 Refer queries from colleagues to the designated person, where these are not within own authority to resolve</p> <p>4.4 Disclose personal data about colleagues only to those who have a right to see it</p>			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Further information and useful publications

To get in touch with us visit our 'Contact us' pages:

- Edexcel, BTEC and Pearson Work Based Learning contact details:
qualifications.pearson.com/en/support/contact-us.html
- books, software and online resources for UK schools and colleges:
www.pearsonschoolsandfecolleges.co.uk

Key publications

- *Adjustments for candidates with disabilities and learning difficulties, Access and Arrangements and Reasonable Adjustments, General and Vocational qualifications* (Joint Council for Qualifications (JCQ))
- *Supplementary guidance for reasonable adjustments and special consideration in vocational internally assessed units* (Pearson)
- *General and Vocational qualifications, Suspected Malpractice in Examination and Assessments: Policies and Procedures* (JCQ)
- *Equality Policy* (Pearson)
- *Recognition of Prior Learning Policy and Process* (Pearson)
- *UK Information Manual* (Pearson)
- *Pearson Edexcel NVQs, SVQs and competence-based qualifications – Delivery Requirements and Quality Assurance Guidance* (Pearson)

All of these publications are available on our website:
qualifications.pearson.com

Further information and publications on the delivery and quality assurance of NVQ/Competence-based qualifications are available at our website on the Delivering BTEC pages. Our publications catalogue lists all the material available to support our qualifications. To access the catalogue and order publications, please go to the resources page of our website.

How to obtain National Occupational Standards

To obtain the National Occupational Standards go to:
www.ukstandards.org.uk.

Professional development and training

Pearson supports UK and international customers with training related to NVQ and BTEC qualifications. This support is available through a choice of training options offered in our published training directory or through customised training at your centre.

The support we offer focuses on a range of issues including:

- planning for the delivery of a new programme
- planning for assessment and grading
- developing effective assignments
- building your team and teamwork skills
- developing student-centred learning and teaching approaches
- building functional skills into your programme
- building effective and efficient quality assurance systems.

The national programme of training we offer can be viewed on our website (qualifications.pearson.com/training). You can request customised training through the website or by contacting one of our advisers in the Training from the Pearson team via Customer Services to discuss your training needs.

The training we provide:

- is active
- is designed to be supportive and thought provoking
- builds on best practice
- may be suitable for those seeking evidence for their continuing professional development.

Annexe A: Quality assurance

Key principles of quality assurance

- A centre delivering Pearson qualifications must be a Pearson recognised centre and must have approval for qualifications that it is offering.
- The centre agrees, as part of gaining recognition, to abide by specific terms and conditions relating to the effective delivery and quality assurance of assessment. The centre must abide by these conditions throughout the period of delivery.
- Pearson makes available to approved centres a range of materials and opportunities to exemplify the processes required for effective assessment and provide examples of effective standards. Approved centres must use the guidance on assessment to ensure that staff who are delivering Pearson qualifications are applying consistent standards.
- An approved centre must follow agreed protocols for: standardisation of assessors; planning, monitoring and recording of assessment processes; internal verification and recording of internal verification processes and dealing with special circumstances, appeals and malpractice.

Quality assurance processes

The approach to quality assured assessment is made through a partnership between a recognised centre and Pearson. Pearson is committed to ensuring that it follows best practice and employs appropriate technology to support quality assurance processes where practicable. The specific arrangements for working with centres will vary. Pearson seeks to ensure that the quality assurance processes it uses do not inflict undue bureaucratic processes on centres, and works to support them in providing robust quality assurance processes.

The learning outcomes and assessment criteria in each unit within this specification set out the standard to be achieved by each learner in order to gain each qualification. Pearson operates a quality assurance process, designed to ensure that these standards are maintained by all assessors and verifiers.

For the purposes of quality assurance, all individual qualifications and units are considered as a whole. Centres offering these qualifications must be committed to ensuring the quality of the units and qualifications they offer, through effective standardisation of assessors and internal verification of assessor decisions. Centre quality assurance and assessment processes are monitored by Pearson.

The Pearson quality assurance processes will involve:

- gaining centre recognition and qualification approval if a centre is not currently approved to offer Pearson qualifications
- annual visits to centres by Pearson for quality review and development of overarching processes and quality standards. Quality review and development visits will be conducted by a Pearson quality development reviewer
- annual visits by occupationally competent and qualified Pearson Standards Verifiers for sampling of internal verification and assessor decisions for the occupational sector
- the provision of support, advice and guidance towards the achievement of National Occupational Standards.

Centres are required to declare their commitment to ensuring quality and appropriate opportunities for learners that lead to valid and accurate assessment outcomes. In addition, centres will commit to undertaking defined training and online standardisation activities.

Annexe B: Centre certification and registration

Pearson Standards Verifiers will provide support, advice and guidance to centres to achieve Direct Claims Status (DCS). Pearson will maintain the integrity of Pearson NVQs through ensuring that the awarding of these qualifications is secure. Where there are quality issues identified in the delivery of programmes, Pearson will exercise the right to:

- direct centres to take action
- limit or suspend certification
- suspend registration.

The approach of Pearson in such circumstances is to work with the centre to overcome the problems identified. If additional training is required, Pearson will aim to secure the appropriate expertise to provide this.

What are the access arrangements and special considerations for the qualifications in this specification?

Centres are required to recruit learners to Pearson qualifications with integrity.

Appropriate steps should be taken to assess each applicant's potential and a professional judgement should be made about their ability to successfully complete the programme of study and achieve the qualification. This assessment will need to take account of the support available to the learner within the centre during their programme of study and any specific support that might be necessary to allow the learner to access the assessment for the qualification. Centres should consult Pearson's policy on learners with particular requirements.

Pearson's policy on access arrangements and special considerations for Pearson qualifications aims to enhance access to the qualifications for learners with disabilities and other difficulties (as defined by Equality Act, 2010) without compromising the assessment of skills, knowledge, understanding or competence. Please refer to *Access Arrangements and Special Considerations for BTEC and Pearson Edexcel NVQ Qualifications* for further details (qualifications.pearson.com).

Annexe C: Assessment requirements/strategy

The Retail Sector's Assessment Principles for the Qualifications & Credit Framework

Final version for use from January 2012

www.skillsmartretail.com

1 Key principles

Assessment methodologies and guidance for qualifications in the retail sector are developed and interpreted in accordance with the following key principles:

Principle 1: Assessment should contribute to developing a skilled workforce	Assessment practice in the retail sector should contribute to the development of a skilled workforce. The choice and application of assessment methods must be consistent with this principle.
Principle 2: Systems for capturing evidence of competence should be integrated	Skills formation in the retail sector, as delivered through staff induction and ongoing training and development programmes, reflects the unique character and culture of the organisation. To this end, the assessment systems for both competence-based and the knowledge-based qualifications should, where possible, be integrated with organisations' training and HR models for developing and recognising the knowledge and competence of their workforce.
Principle 3: Assessment methods should be appropriate for the level and nature of the qualification units to be assessed	Methods of assessing achievement against learning outcomes and assessment criteria must be appropriate for the level being assessed and sector expectations of candidates at that level.
Principle 4: Evidence of competence should come from workplace activity	The sector's competence-based qualifications recognise competence in the workplace. Evidence of competence should therefore come from workplace activity and aim to reflect attainment within an organisational context. Observation should be the principle method to assess individuals at Level 2, but other methods such as professional discussion and assignments may be appropriate to assess achievement at Levels 3 and above.

2 Knowledge-based qualifications (Retail Knowledge)

Assessment methodologies for the retail sector's knowledge-based qualifications are developed by the Awarding Organisations that offer them. Assessment methodologies should be consistent with Principles 1, 2 and 3 as set out in section 1 of this document.

3 Applied qualifications

Qualifications have been developed by Awarding Organisations and Skillsmart Retail that use applied learning techniques and are delivered through full and part-time education. Qualifications for the fashion retail sector are included in this category.

Applied qualifications typically combine theory and its practical application. They are based on shared units and are open to be offered by all retail awarding partners. The assessment methodology for these qualifications is developed by Awarding Organisations and the evidence of success gathered must include evidence of the practical application of knowledge and, where required, work placements.

4 Competence-based qualifications (Retail Skills)

4.1 The use and application of simulation

In broad terms, the retail sector holds the view that simulation is a practical and effective tool for establishing skill and understanding, where naturally occurring evidence of competence is unavailable or infrequent. However the sector feels that there is very little that can be assessed by simulation with the exception of:

- some aspects of Health & Safety and Security, and
- some basic functions that do not involve interaction with customers.

Skillsmart Retail requires that Awarding Organisations:

- a Discourage the inappropriate use of competence-based qualifications by organisations that do not assess candidates in a working environment. Competence-based qualifications are suitable only for learners who are in some form of employment in the sector, or, in a limited set of contexts, are being prepared for work and will be assessed in a realistic working environment (see section 4.1.2 below for definition).
- b Establish criteria to ensure that simulation is not used as the sole form of evidence for any unit of a competence-based qualification, except where allowed for specific units that meet the criteria set out in Section 4.1.1 of these Assessment Principles. This should be expressed in guidance for qualifications operating in the sector.
- c Provide clear guidance to centres to indicate that evidence towards a competence-based qualification should come from the workplace except where simulation is expressly allowed in the evidence requirements for a particular unit. Workplace evidence may be gathered in the context of full, part-time, casual or voluntary employment. Assessment may be undertaken in a 'work placement' (ie fulltime students placed into a working environment for a day per week) although supporting evidence from a supervisor or manager, associated with some form of work activity, must supplement the assessment process.

4.1.1 Use of simulation as an assessment method

Assessment for competence-based units must always be carried out in a retail environment except where a Realistic Working Environment (as defined in 4.1.2) is permitted for simulation. Simulation is allowed only where:

- the assessment criteria require the learner to respond to an emergency;
- a unit covers a limited selection of basic functions which need not involve interacting with customers;
- a unit originates from another SSC or SSB and the originator expressly allows simulation to be used for that unit.

A list of those units for which simulation is allowed is appended to this document.

Evidence generated from simulated activities will not be acceptable for any other unit.

4.1.2 Definition of a Realistic Working Environment (RWE)

Where simulation is used the sector requires that:

- a Simulation must be undertaken in a Realistic Working Environment
- b Awarding Organisations provide guidance for centres that requires that Realistic Working Environments:

'provide an environment that replicates the key characteristics of the workplace in which the skill to be assessed is normally employed'.

A Realistic Working Environment (for the purpose of simulated work activities) is regarded as one that replicates a real working environment. For example, a college shop that operates on a commercial basis (ie it has a profit and loss account) is acceptable for retail environments but a shop laid out in a classroom environment is not. However, in order to prevent any barriers to achievement, simulated activity may be used for assessment purposes within a real working environment.

4.2 The role and competence of assessors, expert witnesses and verifiers

A wide variety of factors affect the participation of organisations and take-up by individuals of competence-based qualifications. These issues relate to other matters as well as the quality of an assessment process but are central to the way assessment is managed.

To this end, Skillsmart Retail requires that the following conditions be fulfilled.

4.2.1 The role of supervisors and managers in the assessment process

Wherever possible, assessment should be conducted by supervisors and/or managers in a workplace environment. Where the skill or capability of these individuals is inadequate to deliver the requirements of the organisation or the quality infrastructure, services external to the work unit or organisation may be introduced (peripatetic assessors). If the candidate is employed in the retail sector, in no circumstances may a competence-based qualification for the retail sector be delivered without the involvement of the candidate's line manager or the owner/manager to confirm the candidate's competence.

Where in-store line managers carry out the assessment or internal verification roles, retail stores with the agreement of their Awarding Organisation may choose between:

- a achieving the appropriate regulatory authority approved qualifications for assessment and internal verification

OR

- b demonstrating that training and development activity undertaken by the employer to prepare, validate and review these assessment/verification roles, maps 100% to the National Occupational Standards on which these qualifications are based. The mapping process **must be agreed** by the Awarding Organisation as providing the equivalent level of rigour and robustness as the achievement of the qualification.

The alternative option described in (b) above, which waives the need for the regulatory approved units in the retail sector, must be applied on an 'organisation by organisation' and 'qualification by qualification' basis.

Prospective organisations must be able to confirm that their in-house practices conform to the requirements of the NOS in association with the prospective Awarding Organisation who will be offering the qualification.

4.2.2 The role of peripatetic assessors and internal verifiers in the assessment process

Peripatetic assessors and internal verifiers must hold or be working towards the appropriate regulatory authority approved qualifications for assessment and internal verification.

The services offered by the peripatetic assessor must complement the activity of a line manager or owner/manager and the competence of a candidate employed in the retail sector may not be confirmed without the participation of a line manager or owner/manager in the process. It is also requested that specific reference be made to auditing this provision, within external verification processes.

4.2.3 The role of expert witnesses in the assessment process

There are a number of specialist sub-sectors in retail. Consequently the sector has competence-based units relating to specialisms such as bakery, beauty consultancy and visual merchandising. In many cases assessors will not have the requisite experience of these specialist areas. In these instances the assessor **must use** an expert witness to provide evidence in confirming to the candidate's competence.

An expert witness is an experienced peer of the candidate, or the candidate's line manager. The expert witness is not consulted as a professional assessor, but as someone who is expert in the occupation to be assessed. The assessor will make the final judgement.

A list is appended of those units for which expert witness testimony is required, should the assessor lack the necessary occupational competence.

4.2.4 Occupational competence of expert witnesses

Expert witnesses can be drawn from a wide range of people who can attest to performance in the workplace, including line managers and experienced colleagues from inside the candidate's organisation. Skillsmart Retail requires that expert witnesses have proven practical experience and knowledge relating to the content of the unit being assessed.

It is unlikely that someone could become an expert in their entire job role in less than six to twelve months of being employed in the retail sector. They could, however, very quickly become an expert in the content of a single unit if this was the focus of their job role. The assessor should make a judgement as to the level of expertise held by a potential expert witness and, where necessary, confirm this with a member of the store management team.

4.2.5 Occupational competence of assessors

Assessors in the retail sector should have an in-depth knowledge of, and be competent in performing, the occupational requirements of the generic competence-based units as well as any specialist units for which they do not use expert witness testimony.

This competence will have been acquired either in direct employment in the occupational role to which the unit relates, or in employment as a manager, supervisor or in-house trainer of employees carrying out the role.

It is unlikely that occupational competence will have been achieved in less than twelve months of employment as a retail assistant, or less than six months in a managerial position, but individuals with less experience could be considered as assessors if sufficiently occupationally competent.

4.2.6 Occupational competence of verifiers

Internal Verifiers (or equivalent quality assurance experts) in the retail sector must have a current understanding of the structure, content and occupational requirements of the units that they are internally verifying. This understanding will have been acquired while working directly within the relevant occupational area in either an operational or a support function.

The level of understanding should be sufficient to allow the Internal Verifier to judge whether the assessor has fully assessed learners against all the assessment criteria in the unit.

It is unlikely that a person could have gained this level of understanding in less than six months of being employed in the retail sector, but individuals with less experience could be considered as Internal Verifiers if they have the required level of understanding.

External Verifiers (or equivalent quality assurance experts) in the retail sector must have a current understanding of the occupational requirements of the units they are verifying. This understanding will have been acquired while working within the relevant occupational area in either an operational or a support function.

The External Verifier must understand the requirements of the units sufficiently well to be able to determine whether sufficient evidence of the learner's competence has been collected.

It is unlikely that a person could have gained this level of understanding in less than six months of being employed in the retail sector, but individuals with less experience could be considered as External Verifiers if they have the required level of understanding.

4.2.7 Continuing professional development of assessors and verifiers

All assessors and verifiers, if not currently employed within a retail organisation, will need to prove they have a current working knowledge of the sector they are assessing or verifying. This can be demonstrated by maintaining records of evidence from occupational updating activities such as:

- Internal or external work experience
- Internal or external work shadowing opportunities
- Other relevant CPD activities with the prior approval of the Awarding Organisations

Note: Retailers who have chosen not to use the regulatory authority approved qualifications for assessment and internal verification should be encouraged to offer the qualifications as CPD where the willingness by the employer to support this additional activity becomes known to the Awarding Organisation.

4.3 External quality control of assessment

The application and implementation of external quality control (ie independent assessment, external moderation, tests and projects) has been thoroughly researched and employers felt it was neither feasible nor practical. The rationale supported by employers was that a robust quality system is based upon processes associated with risk assessment and management.

The Awarding Organisation's risk rating system must be auditable by the regulatory authority.

4.3.1 Risk identification

In order to achieve the required level of external quality control, the Awarding Organisation must undertake a risk assessment of **each** prospective centre at the point of **application for approval to offer any Skillsmart Retail qualification**. The Awarding Organisation must obtain information on a number of specified 'risk factors' for each prospective centre at the point of approval. Skillsmart Retail would recommend the following, but Awarding Organisations should feel free to recommend alternative risk factors if more appropriate:

- Prospective centres' experience of operating competence-based qualifications;
- The appropriateness of existing systems, or systems developed to meet the requirements of other quality assurance regimes, for the delivery of competence-based qualifications;
- Whether the prospective centre has had a previous application for centre approval refused or their approval status withdrawn;

- The proposed ratio of candidates to assessors and Internal Verifiers, taking account of whether the assessors and Internal Verifiers are full-time or part-time in their roles;
- Whether candidates are going to be in employment (paid or voluntary), on work placements or learning in a Realistic Working Environment (see section 4.1.2 for definition).

The Awarding Organisation must have a **method of rating** the prospective centre against each of the risk factors noted above, including an overall rating that identifies the level of risk associated with the prospective centre. The rating should then be used by the Awarding Organisation in determining the degree of support during the first year of approval.

4.3.2 Risk management

In order to identify and manage risk during ongoing centre operation, the Awarding Organisation must undertake a **yearly risk assessment of each active centre for the retail sector competence-based qualifications**.

The Awarding Organisation must obtain information on a number of specified 'risk factors' for each centre. Skillsmart Retail would recommend the following, but Awarding Organisations should feel free to recommend alternative risk factors, which would be more appropriate.

- The turnover of assessors and internal verifiers.
- The throughput of candidates.
- The ratio of candidates to assessors and internal verifiers, taking account of whether the assessors and internal verifiers are full-time or part-time in their roles.
- Whether public funding is being accessed for the training of candidates towards/assessment of candidates for the competence-based qualifications.
- Whether candidates are in employment (paid or voluntary), on work placements or learning in a realistic working environment (see section 4.1.2 for definition).

The Awarding Organisation must have a **method of rating** each centre against each of the risk factors noted above and, also, producing an overall rating which identifies the level of risk associated with the centre. The rating should then be used by the Awarding Organisation to assist in determining the level of ongoing support for the centre, including the level of external verification activity.

Appendix 1: Qualifications covered by these Assessment Principles

Competence-based

Level 1 Award in Retail Skills
Level 1 Certificate in Retail Skills
Level 1 Diploma in Retail Skills

Level 2 Award in Retail Skills
Level 2 Certificate in Retail Skills
Level 2 Diploma in Retail Skills

Level 3 Certificate in Retail Skills (Sales Professional)
Level 3 Certificate in Retail Skills (Visual Merchandising)
Level 3 Certificate in Retail Skills (Management)

Level 3 Diploma in Retail Skills (Sales Professional)
Level 3 Diploma in Retail Skills (Visual Merchandising)
Level 3 Diploma in Retail Skills (Management)

Knowledge-based

Level 1 Award in Retail Knowledge
Level 1 Award in Retail Knowledge (Construction and Electrical Merchandising)

Level 2 Award in Retail Knowledge
Level 2 Certificate in Retail Knowledge
Level 2 Certificate in Retail Knowledge (Construction and Electrical Merchandising – Building)
Level 2 Certificate in Retail Knowledge (Construction and Electrical Merchandising – Domestic Heating and Plumbing)
Level 2 Certificate in Retail Knowledge (Construction and Electrical Merchandising – Commercial Heating)
Level 2 Certificate in Retail Knowledge (Construction and Electrical Merchandising – Timber)
Level 2 Certificate in Retail Knowledge (Construction and Electrical Merchandising – Electrical)
Level 2 Certificate in Retail Knowledge (Construction and Electrical Merchandising – Climate Management)
Level 2 Certificate in Retail Knowledge (Construction and Electrical Merchandising – Building Interiors)
Level 2 Certificate in Retail Knowledge (Construction and Electrical Merchandising – General)
Level 2 Diploma in Retail Knowledge
Level 2 Diploma in Retail Knowledge (Construction and Electrical Merchandising)

Level 3 Award in Retail Knowledge
Level 3 Certificate in Retail Knowledge
Level 3 Diploma in Retail Knowledge
Level 3 Diploma in Retail Knowledge (Garden Retail)

Appendix 2: Retail Skills units for which simulated activities are allowed

This list includes only Skillsmart Retail's units. For guidance on assessing imported units, please refer to the relevant sector's own assessment principles.

SR ref.	Unit title	URN on RITS
B.01	Move goods and materials manually in a retail environment	F/503/5656
B.02	Keep stock at required levels in a retail environment	J/503/5657
B.17	Organise own work to meet a dough production schedule in a retail environment	A/503/5672
C.01	Wrap and pack goods for customers in a retail environment	K/503/5683
E.01	Recognise and report security risks in a retail environment	F/503/5723
E.02	Comply with workplace health and safety requirements in a retail environment	J/503/5724
E.03	Work effectively in a retail team	L/503/5725
E.04	Keep the non-food retail environment clean and tidy	R/503/5726
E.06	Protect own and others' health and safety when working in a retail environment	Y/503/5727
E.07	Reduce security risks in a retail environment	D/503/5728
E.11	Manage the prevention of wastage and loss in a retail environment	H/503/5732
E.18	Monitor and maintain health and safety in a retail environment	M/503/5734

Appendix 3: Retail Skills units for which expert witness testimony is allowed if the assessor is not expert in the specialism covered by the unit

This list includes only Skillsmart Retail's units. For guidance on assessing imported units, please refer to the relevant sector's own assessment principles.

SR ref.	Unit title	URN on RITS
B.11	Hand-process fish in a retail environment	K/503/5666
B.12	Process greengrocery products for sale in a retail environment	M/503/5667
B.13	Finish meat products by hand in a retail environment	T/503/5668
B.17	Organise own work to meet a dough production schedule in a retail environment	A/503/5672
B.20	Maintain food safety while working with food in a retail environment	F/503/5673
B.21	Maintain food safety while working with food in a retail environment	J/503/5674
B.22	Monitor and help improve food safety in a retail environment	L/503/5675
B.35	Finish bake-off food products in a retail environment	H/503/5679
B.36	Glaze, coat or decorate bake-off products for sale in a retail environment	Y/503/5680
C.09	Process applications for credit agreements offered in a retail environment	F/503/5690
C.12	Promote loyalty schemes to customers in a retail environment	J/503/5691
C.17	Provide a bra-fitting service in a retail environment	Y/503/5694
C.18	Follow guidelines for planning and preparing visual merchandising displays	D/503/5695
C.19	Dress visual merchandising displays to attract customers	H/503/5696
C.20	Order and position signage and graphics for visual merchandising displays	K/503/5697
C.21	Dismantle and store props and graphics from visual merchandising displays	M/503/5698

SR ref.	Unit title	URN on RITS
C.22	Make props and decorate fixtures and panels for visual merchandising displays	T/503/5699
C.23	Assemble visual merchandising displays	D/503/5700
C.24	Choose merchandise to feature in visual merchandising displays	H/503/5701
C.25	Manage the use of signage and graphics in visual merchandising displays	K/503/5702
C.26	Evaluate the effectiveness of visual merchandising displays	M/503/5703
C.27	Manage budgets for visual merchandising projects	T/503/5704
C.28	Contribute to improving a retail organisation's visual merchandising policy	A/503/5705
C.29	Design visual merchandising display layouts	F/503/5706
C.37	Provide National Lottery products to customers	L/503/5708
C.42	Advise customers on the fixing and care of tiles	R/503/5709
C.45	Help customers to choose alcoholic beverages in a retail environment	J/503/5710
C.47	Promote a retail store's credit card to customers in a retail environment	R/503/5712
C.52	Help customers to apply for a retail store's credit card and associated insurance products	M/503/5717
C.54	Help customers to choose delicatessen products in a retail environment	T/503/5718
C.55	Portion delicatessen products to meet customer requirements in a retail environment	A/503/5719
C.59	Demonstrate make-up and skincare products to customers at a beauty counter in a retail environment	T/503/5721
C.60	Operate a customer record card system on a beauty counter in a retail environment	A/503/5722
E.12	Produce staffing schedules to help a retail team to achieve its targets	K/503/5733

Annexe D: Additional requirement for qualifications that use the term 'NVQ' in a QCF qualification title

Please go to www.ofqual.gov.uk to access the document '*Operating rules for using the term 'NVQ' in a QCF qualification title*'.

December 2017

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