

Pearson Edexcel Level 2 Award/Certificate/Diploma in Retail Skills (QCF)

Specification

Competence-based qualifications

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Edexcel, BTEC and LCCI qualifications

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Purpose of this specification

This specification sets out:

- the objectives of the qualifications
- any other qualifications that a learner must have completed before taking these qualifications
- any prior knowledge, skills or understanding which the learner is required to have before taking these qualifications
- the combination of units that a learner must have completed before the qualifications will be awarded and any pathways
- any other requirements that a learner must have satisfied before they will be assessed or before the qualifications will be awarded
- the knowledge, skills and understanding that will be assessed as part of the qualifications
- the method of any assessment and any associated requirements relating to it
- the criteria against which a learner's level of attainment will be measured (such as assessment criteria)
- assessment requirements and/or evidence requirements required as specified by the relevant Sector Skills Council/Standards Setting Body
- assessment requirements/strategy as published by the relevant Sector Skills Council/Standards Setting Body
- the Apprenticeship Framework in which the qualifications are included, where appropriate.

1 Introducing Edexcel Competence-based qualifications

What are Competence-based qualifications?

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.

Competence-based qualifications are based on the National Occupational Standards (NOS) for the appropriate sector. NOS define what employees, or potential employees, must be able to do and know, and how well they should undertake work tasks and work roles. At Level 2 and above, these qualifications are recognised as the competence component of Apprenticeship Frameworks. Qualifications at Level 1 can be used in Traineeships, which are stepping stones to Apprenticeship qualifications. Competence-based qualifications can also be delivered as stand-alone for those who wish to take a work-based qualification.

Competence-based qualifications are outcomes-based with no fixed learning programme – allowing flexible delivery that meets the individual learner’s needs. They are suitable for those in employment or those who are studying at college and have a part-time job or access to a substantial work placement so that they are able to demonstrate the competencies that are required for work.

Most learners will work towards their qualification in the workplace or in settings that replicate the working environment as specified in the assessment requirements/strategy for the sector. Colleges, training centres and/or employers can offer these qualifications provided they have access to appropriate physical and human resources.

There are three sizes of Competence-based qualifications in the QCF:

- Award (1 to 12 credits)
- Certificate (13 to 36 credits)
- Diploma (37 credits and above).

Every unit and qualification in the QCF has a credit value.

The credit value of a unit specifies the number of credits that will be awarded to a learner who has met the learning outcomes of the unit.

The credit value of a unit is based on:

- one credit for those learning outcomes achievable in 10 hours of learning
- learning time – defined as the time taken by learners at the level of the unit, on average, to complete the learning outcomes of the unit to the standard determined by the assessment criteria.

2 Qualification summary and key information

Qualification title	Pearson Edexcel Level 2 Award Retail Skills (QCF)
QCF Qualification Number (QN)	600/3853/6
Qualification framework	Qualifications and Credit Framework (QCF)
Regulation start date	04/11/2011
Operational start date	01/01/2012
Approved age ranges	16–18 19+ Please note that sector-specific requirements or regulations may prevent learners of a particular age from embarking on this qualification. Please refer to the assessment requirements/strategy.
Credit value	9
Assessment	Portfolio of Evidence (internal assessment).
Guided learning hours	24–57.
Grading information	The qualification and units are graded pass/fail.

Qualification title	Pearson Edexcel Level 2 Certificate Retail Skills (QCF)
QCF Qualification Number (QN)	600/3854/8
Qualification framework	Qualifications and Credit Framework (QCF)
Regulation start date	04/11/2011
Operational start date	01/01/2012
Approved age ranges	16–18 19+ Please note that sector-specific requirements or regulations may prevent learners of a particular age from embarking on this qualification. Please refer to the assessment requirements/strategy.
Credit value	24
Assessment	Portfolio of Evidence (internal assessment).
Guided learning hours	73–161
Grading information	The qualification and units are graded pass/fail.

Qualification title	Pearson Edexcel Level 2 Diploma Retail Skills (QCF)
QCF Qualification Number (QN)	600/3867/6
Qualification framework	Qualifications and Credit Framework (QCF)
Regulation start date	07/11/2011
Operational start date	01/01/2012
Approved age ranges	16–18 19+ Please note that sector-specific requirements or regulations may prevent learners of a particular age from embarking on this qualification. Please refer to the assessment requirements/strategy.
Credit value	37
Assessment	Portfolio of Evidence (internal assessment).
Guided learning hours	115–255
Grading information	The qualification and units are graded pass/fail.

Qualification title	Pearson Edexcel Level 2 Award/Certificate/Diploma in Retail skills(QCF)
Entry requirements	No prior knowledge, understanding, skills or qualifications are required before learners register for these qualifications. However, centres must follow the Pearson Access and Recruitment policy (see <i>Section 7, Access and recruitment</i>).
Funding	<p>Details on funding approval will be available in the future on the Learning Aims Reference Service (LARS) database, which replaces the Learning Aim Reference Application (LARA). In the interim, the LARS Lite database is available to check funding approval.</p> <p>Alternatively, the Skills Funding Agency's simplified funding catalogues can be used to check funding approval.</p> <p>Further information and guidance is available on the website: www.gov.uk</p>

Centres will need to use the QCF Qualification Number (QN) when they seek public funding for their learners. As well as a QN, each unit in a qualification has a QCF unit reference number (URN).

The qualification title, unit titles and QN will appear on each learner's final certificate. Centres should tell learners this when recruiting them and registering them with Pearson. There is more information about certification in our *UK Information Manual*, available on our website at: www.edexcel.com

3 Qualification rationale

Qualification objectives

The Pearson Edexcel Level 2 Award, Certificate and Diploma in Retail Skills (QCF) are for learners who work in, or who want to gain employment in, the retail sector. The Certificate- and Diploma-sized qualifications also make up the competency element of the Retail Intermediate Apprenticeship.

These qualifications give learners the opportunity to:

- develop and demonstrate competence in the job roles such as sales assistant, retail merchandiser, sales advisors and stockroom assistant
- develop wider work-related knowledge such as customer services, sales, quality and stock control, and payment handling
- develop and demonstrate a range of skills and behaviours that supports competency in the job roles stated above, such as: communication skills, team working, numeracy and Information Technology literacy
- develop their own personal growth and engagement in learning through the development of personal, learning and thinking skills (PLTS)
- have existing skills recognised
- achieve a nationally-recognised Level 2 qualification

The Pearson Edexcel Level 2 Award in Retail Skills (QCF) allows the learner to focus on a specific area of interest or expertise within retail.

The Pearson Edexcel Level 2 Certificate in Retail Skills (QCF) extends the work-related focus from the Level 2 Award (QCF) and offers an engaging programme for those who are clearer about the retail environment in which they wish to progress. It is a flexible qualification, which can be tailored to meet the requirements of individual job roles and gives the learner an opportunity to:

- broaden the depth and breadth of their learning covering concepts specific to their roles and requirements such as merchandising, bakery, visual displays and working within the multichannel retail environment
- provide the opportunity to understand the process of dealing with returned goods and materials, helping customers choose goods, understand the process for payments for online orders

The Pearson Edexcel Level 2 Diploma in Retail Skills (QCF) extends the work related focus from the Edexcel Level 2 Certificate and is a more substantial practical work-related qualification.

This qualification gives the learner an opportunity to:

- complete projects and assignments based on realistic workplace situations and activities. Topics covered can include displays and visual merchandising, handling cash, security and stock control.
- Provides a foundation of knowledge and understanding at level 2 enabling progression to Level 3 qualifications in retail
- extend their programme of study through a knowledge based or other related vocational or personal and social development qualification

Relationship with previous qualifications

These qualifications are not a replacement for the Pearson Edexcel Level 2 Award/Certificate/Diploma in Retail Skills; they are amended qualifications with the addition of three new units relevant for multi-channel retail sales.

Progression opportunities

Learners who achieve the Pearson Edexcel Level 2 Award/Certificate/Diploma can progress to the Pearson Edexcel BTEC Level 3 Certificate or Diploma in Retail Knowledge (QCF) and/or the Pearson Edexcel Level 3 qualifications in Retail Skills (Visual Merchandising), (Sales Professional) or (Management) (QCF).

Industry support and recognition

These qualifications are supported by People 1st, the Sector Skills Council for Retail.

Relationship with National Occupational Standards

These qualifications are based on the National Occupational Standards (NOS) in Retail, which were set and designed by People 1st.

4 Qualification structures

Pearson Edexcel Level 2 Award in Retail Skills (QCF)

The learner will need to meet the requirements outlined in the table below before the qualification can be awarded.

Minimum number of credits that must be achieved from the Optional units group	9
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Unit	Unit reference number	Optional units	Level	Credit	Guided learning hours
1	R/503/5659	Receive goods and materials into storage in a retail environment	2	4	22
2	J/503/5660	Place goods and materials into storage in a retail environment	2	4	19
3	L/503/5661	Keep stock on sale at required levels in a retail environment	2	3	16
4	R/503/5662	Process customer orders for goods in a retail environment	2	3	19
5	Y/503/5663	Process returned goods in a retail environment	2	3	18
7	H/503/5665	Assemble products for display in a retail environment	2	2	9
8	K/503/5666	Hand-process fish in a retail environment	2	6	21
9	M/503/5667	Process greengrocery products for sale in a retail environment	2	7	17
10	T/503/5668	Finish meat products by hand in a retail environment	2	9	29
13	A/503/5672	Organise own work to meet a dough production schedule in a retail environment	2	10	48
17	J/503/5674	Maintain food safety while working with food in a retail environment	2	6	13
19	R/503/5676	Pick products in a retail environment to fulfil customer orders	2	4	19
21	D/503/5678	Check stock levels and sort out problems with stock levels in a retail environment	2	2	10
26	H/503/5679	Finish bake-off food products in a retail environment	2	3	15

Unit	Unit reference number	Optional units	Level	Credit	Guided learning hours
27	Y/503/5680	Glaze, coat and decorate bake-off products for sale in a retail environment	2	3	15
30	M/503/5684	Display stock to promote sales to customers in a retail environment	2	5	26
31	T/503/5685	Help customers to choose products in a retail environment	2	6	20
32	A/503/5686	Carry out promotional campaigns in a retail environment	2	4	18
33	F/503/5687	Deal with customer queries and complaints in a retail environment	2	4	24
34	J/503/5688	Demonstrate products to customers in a retail environment	2	3	15
35	L/503/5689	Process payments for purchases in a retail environment	2	4	17
36	F/503/5690	Process applications for credit agreements offered in a retail environment	2	5	25
37	J/503/5691	Promote loyalty schemes to customers in a retail environment	2	3	11
40	Y/503/5694	Provide a bra-fitting service in a retail environment	2	10	44
41	D/503/5695	Follow guidelines for planning and preparing visual merchandising displays	2	5	22
42	H/503/5696	Dress visual merchandising displays to attract customers	2	7	35
43	K/503/5697	Order and position signage and graphics for visual merchandising displays	2	3	15
44	M/503/5698	Dismantle and store props and graphics from visual merchandising displays	2	3	15
45	T/503/5699	Make props and decorate fixtures and panels for visual merchandising displays	2	10	45
46	D/503/5700	Assemble visual merchandising displays	2	4	20
53	J/503/5707	Follow point-of-sale procedures for age-restricted products in a retail environment	2	2	11

Unit	Unit reference number	Optional units	Level	Credit	Guided learning hours
54	L/503/5708	Provide National Lottery products to customers	2	4	25
55	R/503/5709	Advise customers on the fixing and care of tiles	2	6	35
58	L/503/5711	Cash up in a retail environment	2	2	9
59	R/503/5712	Promote a retail store's credit card to customers in a retail environment	2	3	12
60	Y/503/5713	Provide service to customers in a dressing room in a retail environment	2	3	16
61	D/503/5714	Promote food or drink products by offering samples to customers	2	2	13
62	H/503/5715	Deliver goods from a retail environment to the customer's delivery address	2	3	17
64	M/503/5717	Help customers to apply for a retail store's credit card and associated insurance products	2	4	22
65	T/503/5718	Help customers to choose delicatessen products in a retail environment	2	3	15
66	A/503/5719	Portion delicatessen products to meet customer requirements in a retail environment	2	2	9
69	T/503/5721	Demonstrate makeup and skincare products to customers at a beauty counter in a retail environment	2	4	15
70	A/503/5722	Operate a customer record card system on a beauty counter in a retail environment	2	2	8
72	Y/503/5727	Protect own and others' health and safety when working in a retail environment	2	5	28
73	D/503/5728	Reduce security risks in a retail environment	2	5	25
80	A/503/5736	Prepare newspapers and magazines for return to merchandisers	2	2	10
82	J/503/5738	Check the accuracy of records of hours worked by staff in a retail environment	2	4	17

Pearson Edexcel Level 2 Certificate in Retail Skills (QCF)

The learner will need to meet the requirements outlined in the table below before the qualification can be awarded.

Minimum number of credits that must be achieved	24
Minimum number of credits that must be achieved at Level 2 or above	19
Number of Group A mandatory credits that must be achieved	8
Number of optional credits that must be achieved A minimum of 7 credits must come from the Level 2 units in Group B The remaining 9 credits can be at Levels 1, 2 and 3 in Groups B, C1 and C2 although no more than 5 credits can come from the Level 1 units in Group C1	16

Unit	Unit reference number	Mandatory unit – Group A	Level	Credit	Guided learning hours
79	T/503/5735	Work effectively in a retail team	2	8	37
Unit	Unit reference number	Optional units – Group B	Level	Credit	Guided learning hours
1	R/503/5659	Receive goods and materials into storage in a retail environment	2	4	22
2	J/503/5660	Place goods and materials into storage in a retail environment	2	4	19
3	L/503/5661	Keep stock on sale at required levels in a retail environment	2	3	16
4	R/503/5662	Process customer orders for goods in a retail environment	2	3	19
5	Y/503/5663	Process returned goods in a retail environment	2	3	18
7	H/503/5665	Assemble products for display in a retail environment	2	2	9
8	K/503/5666	Hand-process fish in a retail environment	2	6	21
9	M/503/5667	Process greengrocery products for sale in a retail environment	2	7	17
10	T/503/5668	Finish meat products by hand in a retail environment	2	9	29
13	A/503/5672	Organise own work to meet a dough production schedule in a retail environment	2	10	48

Unit	Unit reference number	Optional units – Group B	Level	Credit	Guided learning hours
14	D/601/4551	Select, weigh and measure bakery ingredients	2	3	16
15	T/601/4555	Hand-divide, mould and shape fermented dough	2	4	21
17	J/503/5674	Maintain food safety while working with food in a retail environment	2	6	13
19	R/503/5676	Pick products in a retail environment to fulfil customer orders	2	4	19
21	D/503/5678	Check stock levels and sort out problems with stock levels in a retail environment	2	2	10
22	R/502/0854	Maintain moisture levels for crops or plants	2	2	15
23	L/502/0853	Provide nutrients to crops or plants	2	2	15
24	Y/502/1214	Remove unwanted plant growth to maintain development	2	5	38
25	K/502/1511	Identify and report the presence of pests, diseases and disorders	2	3	23
26	H/503/5679	Finish bake-off food products in a retail environment	2	3	15
27	Y/503/5680	Glaze, coat and decorate bake-off products for sale in a retail environment	2	3	15
30	M/503/5684	Display stock to promote sales to customers in a retail environment	2	5	26
31	T/503/5685	Help customers to choose products in a retail environment	2	6	20
32	A/503/5686	Carry out promotional campaigns in a retail environment	2	4	18
33	F/503/5687	Deal with customer queries and complaints in a retail environment	2	4	24
34	J/503/5688	Demonstrate products to customers in a retail environment	2	3	15
35	L/503/5689	Process payments for purchases in a retail environment	2	4	17
36	F/503/5690	Process applications for credit agreements offered in a retail environment	2	5	25

Unit	Unit reference number	Optional units – Group B	Level	Credit	Guided learning hours
37	J/503/5691	Promote loyalty schemes to customers in a retail environment	2	3	11
40	Y/503/5694	Provide a bra-fitting service in a retail environment	2	10	44
41	D/503/5695	Follow guidelines for planning and preparing visual merchandising displays	2	5	22
42	H/503/5696	Dress visual merchandising displays to attract customers	2	7	35
43	K/503/5697	Order and position signage and graphics for visual merchandising displays	2	3	15
44	M/503/5698	Dismantle and store props and graphics from visual merchandising displays	2	3	15
45	T/503/5699	Make props and decorate fixtures and panels for visual merchandising displays	2	10	45
46	D/503/5700	Assemble visual merchandising displays	2	4	20
53	J/503/5707	Follow point-of-sale procedures for age-restricted products in a retail environment	2	2	11
54	L/503/5708	Provide National Lottery products to customers	2	4	25
55	R/503/5709	Advise customers on the fixing and care of tiles	2	6	35
58	L/503/5711	Cash up in a retail environment	2	2	9
59	R/503/5712	Promote a retail store's credit card to customers in a retail environment	2	3	12
60	Y/503/5713	Provide service to customers in a dressing room in a retail environment	2	3	16
61	D/503/5714	Promote food or drink products by offering samples to customers	2	2	13
62	H/503/5715	Deliver goods from a retail environment to the customer's delivery address	2	3	17

Unit	Unit reference number	Optional units – Group B	Level	Credit	Guided learning hours
64	M/503/5717	Help customers to apply for a retail store's credit card and associated insurance products	2	4	22
65	T/503/5718	Help customers to choose delicatessen products in a retail environment	2	3	15
66	A/503/5719	Portion delicatessen products to meet customer requirements in a retail environment	2	2	9
67	J/502/0771	Merchandise plants and other relevant products	2	6	45
69	T/503/5721	Demonstrate makeup and skincare products to customers at a beauty counter in a retail environment	2	4	15
70	A/503/5722	Operate a customer record card system on a beauty counter in a retail environment	2	2	8
71	L/601/0933	Give customers a positive impression of yourself and your organisation	2	5	33
72	Y/503/5727	Protect own and others' health and safety when working in a retail environment	2	5	28
73	D/503/5728	Reduce security risks in a retail environment	2	5	25
80	A/503/5736	Prepare newspapers and magazines for return to merchandisers	2	2	10
82	J/503/5738	Check the accuracy of records of hours worked by staff in a retail environment	2	4	17
83	D/505/9382	Maintaining data confidentiality and security when using web-based retail facilities in-store	2	2	11
84	D/505/9379	Using web-based facilities in-store to achieve retail sales	2	2	20
85	R/505/9380	Advising and supporting customers on the use of in-store web-based retail facilities	2	3	24

Unit	Unit reference number	Optional units – Group C1	Level	Credit	Guided learning hours
6	D/503/5664	Sort donated goods for resale or recycling in a retail environment	1	3	6
16	F/503/5673	Maintain food safety while working with food in a retail environment	1	5	11
20	Y/503/5677	Load orders for despatch from a retail store to customers	1	3	15
56	L/601/5016	Provide a counter and takeaway service	1	3	30
63	K/503/5716	Contribute to monitoring and maintaining ease of shopping in a retail sales area	1	2	8
Unit	Unit reference number	Optional units – Group C2	Level	Credit	Guided learning hours
11	A/503/5669	Audit stock levels and stock inventories in a retail environment	3	6	28
28	D/503/5681	Manage staff to receive goods in a retail environment	3	5	24
29	H/503/5682	Organise and monitor the storage of stock in a retail environment	3	6	27
38	L/503/5692	Maintain the availability of goods on display in a retail environment to promote sales	3	6	30
39	R/503/5693	Manage the payment transaction process in a retail environment	3	9	43
47	H/503/5701	Choose merchandise to feature in visual merchandising displays	3	6	27
48	K/503/5702	Manage the use of signage and graphics in visual merchandising displays	3	7	31
49	M/503/5703	Evaluate the effectiveness of visual merchandising displays	3	9	46
51	A/503/5705	Contribute to improving a retail organisation's visual merchandising policy	3	8	36
68	M/503/5720	Help customers to choose specialist products in a retail environment	3	8	34
77	K/503/5733	Produce staffing schedules to help a retail team to achieve its targets	3	5	22

Unit	Unit reference number	Optional units – Group C2	Level	Credit	Guided learning hours
81	F/503/5737	Monitor and support secure payment point use during trading hours	3	3	13
86	Y/505/9381	Motivating colleagues to promote web-based retail facilities to customers	3	4	30

Pearson Edexcel Level 2 Diploma in Retail Skills (QCF)

The learner will need to meet the requirements outlined in the table below before the qualification can be awarded.

Minimum number of credits that must be achieved	37
Minimum number of credits that must be achieved at level 2 or above	32
Number of Group A mandatory credits that must be achieved	8
Number of optional credits that must be achieved A minimum of 14 credits must come from the Level 2 units in Group B The remaining 15 credits can be at Levels 1, 2 and 3 in Groups B, C1 and C2 although no more than 5 credits can come from the Level 1 units in Group C1	29

Unit	Unit reference number	Mandatory unit – Group A	Level	Credit	Guided learning hours
79	T/503/5735	Work effectively in a retail team	2	8	37
Unit	Unit reference number	Optional units – Group B	Level	Credit	Guided learning hours
1	R/503/5659	Receive goods and materials into storage in a retail environment	2	4	22
2	J/503/5660	Place goods and materials into storage in a retail environment	2	4	19
3	L/503/5661	Keep stock on sale at required levels in a retail environment	2	3	16
4	R/503/5662	Process customer orders for goods in a retail environment	2	3	19
5	Y/503/5663	Process returned goods in a retail environment	2	3	18
7	H/503/5665	Assemble products for display in a retail environment	2	2	9
8	K/503/5666	Hand-process fish in a retail environment	2	6	21
9	M/503/5667	Process greengrocery products for sale in a retail environment	2	7	17
10	T/503/5668	Finish meat products by hand in a retail environment	2	9	29
13	A/503/5672	Organise own work to meet a dough production schedule in a retail environment	2	10	48

Unit	Unit reference number	Optional units – Group B	Level	Credit	Guided learning hours
14	D/601/4551	Select, weigh and measure bakery ingredients	2	3	16
15	T/601/4555	Hand-divide, mould and shape fermented dough	2	4	21
17	J/503/5674	Maintain food safety while working with food in a retail environment	2	6	13
19	R/503/5676	Pick products in a retail environment to fulfil customer orders	2	4	19
21	D/503/5678	Check stock levels and sort out problems with stock levels in a retail environment	2	2	10
22	R/502/0854	Maintain moisture levels for crops or plants	2	2	15
23	L/502/0853	Provide nutrients to crops or plants	2	2	15
24	Y/502/1214	Remove unwanted plant growth to maintain development	2	5	38
25	K/502/1511	Identify and report the presence of pests, diseases and disorders	2	3	23
26	H/503/5679	Finish bake-off food products in a retail environment	2	3	15
27	Y/503/5680	Glaze, coat and decorate bake-off products for sale in a retail environment	2	3	15
30	M/503/5684	Display stock to promote sales to customers in a retail environment	2	5	26
31	T/503/5685	Help customers to choose products in a retail environment	2	6	20
32	A/503/5686	Carry out promotional campaigns in a retail environment	2	4	18
33	F/503/5687	Deal with customer queries and complaints in a retail environment	2	4	24
34	J/503/5688	Demonstrate products to customers in a retail environment	2	3	15
35	L/503/5689	Process payments for purchases in a retail environment	2	4	17
36	F/503/5690	Process applications for credit agreements offered in a retail environment	2	5	25

Unit	Unit reference number	Optional units – Group B	Level	Credit	Guided learning hours
37	J/503/5691	Promote loyalty schemes to customers in a retail environment	2	3	11
40	Y/503/5694	Provide a bra-fitting service in a retail environment	2	10	44
41	D/503/5695	Follow guidelines for planning and preparing visual merchandising displays	2	5	22
42	H/503/5696	Dress visual merchandising displays to attract customers	2	7	35
43	K/503/5697	Order and position signage and graphics for visual merchandising displays	2	3	15
44	M/503/5698	Dismantle and store props and graphics from visual merchandising displays	2	3	15
45	T/503/5699	Make props and decorate fixtures and panels for visual merchandising displays	2	10	45
46	D/503/5700	Assemble visual merchandising displays	2	4	20
53	J/503/5707	Follow point-of-sale procedures for age-restricted products in a retail environment	2	2	11
54	L/503/5708	Provide National Lottery products to customers	2	4	25
55	R/503/5709	Advise customers on the fixing and care of tiles	2	6	35
58	L/503/5711	Cash up in a retail environment	2	2	9
59	R/503/5712	Promote a retail store's credit card to customers in a retail environment	2	3	12
60	Y/503/5713	Provide service to customers in a dressing room in a retail environment	2	3	16
61	D/503/5714	Promote food or drink products by offering samples to customers	2	2	13
62	H/503/5715	Deliver goods from a retail environment to the customer's delivery address	2	3	17

Unit	Unit reference number	Optional units – Group B	Level	Credit	Guided learning hours
64	M/503/5717	Help customers to apply for a retail store's credit card and associated insurance products	2	4	22
65	T/503/5718	Help customers to choose delicatessen products in a retail environment	2	3	15
66	A/503/5719	Portion delicatessen products to meet customer requirements in a retail environment	2	2	9
67	J/502/0771	Merchandise plants and other relevant products	2	6	45
69	T/503/5721	Demonstrate makeup and skincare products to customers at a beauty counter in a retail environment	2	4	15
70	A/503/5722	Operate a customer record card system on a beauty counter in a retail environment	2	2	8
71	L/601/0933	Give customers a positive impression of yourself and your organisation	2	5	33
72	Y/503/5727	Protect own and others' health and safety when working in a retail environment	2	5	28
73	D/503/5728	Reduce security risks in a retail environment	2	5	25
80	A/503/5736	Prepare newspapers and magazines for return to merchandisers	2	2	10
82	J/503/5738	Check the accuracy of records of hours worked by staff in a retail environment	2	4	17
83	D/505/9382	Maintaining data confidentiality and security when using web-based retail facilities in-store	2	2	11
84	D/505/9379	Using web-based facilities in-store to achieve retail sales	2	2	20
85	R/505/9380	Advising and supporting customers on the use of in-store web-based retail facilities	2	3	24

Unit	Unit reference number	Optional units – Group C1	Level	Credit	Guided learning hours
6	D/503/5664	Sort donated goods for resale or recycling in a retail environment	1	3	6
16	F/503/5673	Maintain food safety while working with food in a retail environment	1	5	11
20	Y/503/5677	Load orders for despatch from a retail store to customers	1	3	15
56	L/601/5016	Provide a counter and takeaway service	1	3	30
63	K/503/5716	Contribute to monitoring and maintaining ease of shopping in a retail sales area	1	2	8
Unit	Unit reference number	Optional units – Group C2	Level	Credit	Guided learning hours
11	A/503/5669	Audit stock levels and stock inventories in a retail environment	3	6	28
12	T/503/5671	Source required goods and services in a retail environment	3	10	52
18	L/503/5675	Monitor and help improve food safety in a retail environment	3	11	50
28	D/503/5681	Manage staff to receive goods in a retail environment	3	5	24
29	H/503/5682	Organise and monitor the storage of stock in a retail environment	3	6	27
38	L/503/5692	Maintain the availability of goods on display in a retail environment to promote sales	3	6	30
39	R/503/5693	Manage the payment transaction process in a retail environment	3	9	43
47	H/503/5701	Choose merchandise to feature in visual merchandising displays	3	6	27
48	K/503/5702	Manage the use of signage and graphics in visual merchandising displays	3	7	31
49	M/503/5703	Evaluate the effectiveness of visual merchandising displays	3	9	46
50	T/503/5704	Manage budgets for visual merchandising projects	3	10	46

Unit	Unit reference number	Optional units – Group C2	Level	Credit	Guided learning hours
51	A/503/5705	Contribute to improving a retail organisation's visual merchandising policy	3	8	36
52	F/503/5706	Design visual merchandising display layouts	3	10	46
57	J/503/5710	Help customers to choose alcoholic beverages in a retail environment	3	10	53
68	M/503/5720	Help customers to choose specialist products in a retail environment	3	8	34
74	Y/503/5730	Deputise for the leader of a retail team	3	11	55
75	D/503/5731	Contribute to the continuous improvement of retail operations within own area of responsibility	3	10	47
76	H/503/5732	Manage the prevention of wastage and loss in a retail environment	3	11	50
77	K/503/5733	Produce staffing schedules to help a retail team to achieve its targets	3	5	22
78	M/503/5734	Monitor and maintain health and safety in a retail environment	3	13	60
81	F/503/5737	Monitor and support secure payment point use during trading hours	3	3	13
86	Y/505/9381	Motivating colleagues to promote web-based retail facilities to customers	3	4	30

5 Programme delivery

Centres are free to offer these qualifications using any mode of delivery (for example full-time, part-time, evening only, distance learning) that meets learners' needs. Learners must be in employment or working with a training provider on a programme so that they can develop and demonstrate the occupational competence required.

Whichever mode of delivery is used, centres must make sure that learners have access to specified resources and to the sector specialists delivering and assessing the units. Centres must adhere to the Pearson policies that apply to the different modes of delivery. Our policy on *Collaborative arrangements for the delivery of vocational qualifications* can be found on our website: www.edexcel.com/policies

There are various approaches to delivering a successful competence-based qualification. The section below outlines elements of good practice that centres can adopt in relation to learner recruitment, preparation and support, training and assessment delivery, and employer engagement.

Elements of good practice

Learner recruitment, preparation and support

Good practice in relation to learner recruitment, preparation and support includes:

- providing initial advice and guidance, including work tasters, to potential learners to give them an insight into the relevant industry and the learning programme
- using a range of appropriate and rigorous selection methods to ensure that learners are matched to the programme best suited to their needs
- carrying out a thorough induction for learners to ensure that they completely understand the programme and what is expected of them. The induction should include, for example, the requirements of the programme, an initial assessment of current competency levels, assessment of individual learning styles, identification of training needs, an individual learning plan, details of training delivery and the assessment process. It is good practice to involve the employer in the induction process. This helps employers to understand what will be taking place during the programme and enables them to start building a relationship with the centre to support the effective delivery of the programme
- keeping in regular contact with the learner to keep them engaged and motivated, and ensuring that there are open lines of communication between the learner, the assessor, the employer and teaching staff.

Training and assessment delivery

Good practice in relation to training and assessment delivery includes:

- offering flexible delivery and assessment to meet the needs of the employer and learner, through the use of a range of approaches, for example virtual learning environments (VLEs), online lectures, video, printable online resources, virtual visits, webcams for distance training, e-portfolios
- planning opportunities for the development and practising of skills on the job. On-the-job training presents an excellent opportunity to develop the learner's routine expertise, resourcefulness, craftpersonship and business-like attitude. It is therefore important that there is intentional structuring of practice and guidance to supplement the learning and development provided through engagement in everyday work activities. Learners need to have structured time to learn and practice their skills separate from their everyday work activities. Teaching and learning methods, such as coaching, mentoring, shadowing, reflective practice, collaboration and consultation, could be used in this structured on-the-job learning
- integrating the delivery and assessment of Personal, Learning and Thinking Skills (PLTS) and Employment Rights and Responsibilities (ERR) if the programme is being delivered as a part of an Apprenticeship. It is important that learners understand the relevance of these skills in the workplace and are aware of when and how they will be developing them. Please see *Annexe C* for mapping of PLTS to the units in this specification
- developing an holistic approach to assessment by matching evidence to different assessment criteria, learning outcomes and units as appropriate, thereby reducing the assessment burden on learners and assessors. It is good practice to draw up an assessment plan that aligns the units with the learning process and the acquisition of knowledge and skills, and that indicates how and when the units will be assessed
- discussing and agreeing with the learner and employer suitable times, dates and work areas where assessment will take place. Learners and employers should be given regular and relevant feedback on performance and progress.

Employer engagement

Good practice in relation to employer engagement includes:

- communicating with employers at the start of the programme to understand their business context and requirements so that the programme can be tailored to meet their needs
- working with the employer to ensure that learners are allocated a mentor in the workplace to assist them in the day-to-day working environment and to act as a contact for the assessor/tutor
- helping the employer to better understand their role in the delivery of the programme. It is important that employers understand that sufficient and relevant work must be given to learners in order to provide a culture of learning and to ensure that they are given every opportunity to participate in aspects of continuous professional development (CPD).

6 Centre resource requirements

As part of the approval process, centres must make sure that the resource requirements below are in place before offering the qualifications.

General resource requirements

- Centres must have the appropriate physical resources to support delivery and assessment of the qualifications. For example, a workplace in line with industry standards, or a Realistic Working Environment (RWE), where permitted, as specified in the assessment requirements/strategy for the sector, equipment, IT, learning materials, teaching rooms.
- Where RWE is permitted, it must offer the same conditions as the normal, day-to-day working environment, with a similar range of demands, pressures and requirements for cost-effective working.
- Centres must meet any specific human and physical resource requirements outlined in the assessment requirements/strategy in *Annexe A*. Staff assessing learners must meet the occupational competence requirements within the overarching assessment requirements/strategy for the sector.
- There must be systems in place to ensure continuing professional development for staff delivering the qualifications.
- Centres must have appropriate health and safety policies, procedures and practices in place for the delivery and assessment of the qualification.
- Centres must deliver the qualifications in accordance with current equality legislation. For further details on Pearson's commitment to the Equality Act 2010, please see *Section 7, Access and recruitment*. For full details on the Equality Act 2010, please go to www.legislation.gov.uk

Specific resource requirements

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 A: Assessment requirements/strategy*. Staff assessing the learner must meet the requirements in the overarching assessment strategy for the sector.

7 Access and recruitment

Our policy on access to our qualifications is that:

- they should be available to everyone who is capable of reaching the required standards
- they should be free from barriers that restrict access and progression
- there should be equal opportunities for all wishing to access the qualifications.

Centres must ensure that their learner recruitment process is conducted with integrity. This includes ensuring that applicants have appropriate information and advice about the qualification to ensure that it will meet their needs.

Centres should review applicants' prior qualifications and/or experience, considering whether this profile shows that they have the potential to achieve the qualification.

Prior knowledge, skills and understanding

No prior knowledge, understanding, skills or qualifications are required before learners register for this qualification.

Access to qualifications for learners with disabilities or specific needs

Equality and fairness are central to our work. Pearson's Equality Policy requires all learners to have equal opportunity to access our qualifications and assessments and that our qualifications are awarded in a way that is fair to every learner.

We are committed to making sure that:

- learners with a protected characteristic (as defined by the Equality Act 2010) are not, when they are undertaking one of our qualifications, disadvantaged in comparison to learners who do not share that characteristic
- all learners achieve the recognition they deserve from undertaking a qualification and that this achievement can be compared fairly to the achievement of their peers.

For learners with disabilities and specific needs, the assessment of their potential to achieve the qualification must identify, where appropriate, the support that will be made available to them during delivery and assessment of the qualification. Please see the information regarding reasonable adjustments and special consideration in *Section 8, Assessment*.

8 Assessment

To achieve a pass for the full qualifications, the learner must achieve all the units required in the stated qualification structures.

Language of assessment

Assessment of the internally assessed units may be in English, Welsh or Irish. If assessment is to be carried out in either Welsh or Irish then centres must inform Pearson at the point of learner registration.

A learner taking the qualifications may be assessed in British or Irish Sign Language where it is permitted for the purpose of reasonable adjustment.

Further information on the use of language in qualifications is available in our policy document *Use of languages in qualifications policy*, available on our website at: www.edexcel.com

Further information on access arrangements can be found in the Joint Council for Qualifications (JCQ) document *Access Arrangements, Reasonable Adjustments and Special Consideration for General and Vocational qualifications*. Both documents are on our website at: www.edexcel.com/policies

Internal assessment

The units in these qualifications are assessed through an internally and externally quality assured Portfolio of Evidence made up of evidence gathered during the course of the learner's work.

Each unit has specified learning outcomes and assessment criteria. To pass each unit the learner must:

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

The learner must have an assessment record that identifies the assessment criteria that have been met. The assessment record should be cross-referenced to the evidence provided. The assessment record should include details of the type of evidence and the date of assessment. Suitable centre documentation should be used to form an assessment record.

It is important that the evidence provided to meet the assessment criteria for the unit and learning outcomes 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

Learners can provide evidence of occupational competence 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 programme. The evidence provided must meet the requirements of the Sector Skills Council's assessment requirements/strategy
 - the **Recognition of Prior Learning (RPL)** – where a learner can demonstrate that they can meet a unit's assessment criteria through knowledge, understanding or skills they already possess without undertaking a course of development. They must submit sufficient, reliable, authentic and valid evidence for assessment. Evidence submitted that is based on RPL should give the centre confidence that the same level of skill, understanding and knowledge exists at the time of claim as existed at the time the evidence was produced. RPL is acceptable for accrediting a unit, several units, or a whole qualification
- Further guidance is available in our policy document *Recognition of Prior Learning Policy and Process*, available on our website at: www.edexcel.com/policies
- a combination of these.

Assessment requirements/strategy

The assessment requirements/strategy for these qualifications are included in *Annexe A*. They set out the overarching assessment principles and the framework for assessing the units to ensure that the qualifications remain valid and reliable. They have been developed by People 1st in partnership with employers, training providers, awarding organisations and the regulatory authorities.

Types of evidence

To achieve a unit, the learner must gather evidence that shows that they have met the required standard specified in the assessment criteria, Pearson's quality assurance arrangements (please see *Section 10, Quality assurance of centres*) and the requirements of the assessment requirements/strategy given in *Annexe A*.

In line with the assessment requirements/strategy, evidence for internally assessed units can take a variety of forms as indicated below:

- 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)
- professional discussion (PD)
- authentic statements/witness testimony (WT)
- expert witness testimony (EWT)
- evidence of Recognition of Prior Learning (RPL).

Assessment for competence-based units must always be carried out in a retail environment except where a Realistic Working Environment is permitted for simulation. Simulation (S) 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 can be found in the People 1st assessment strategy, in *Annexe A*.

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

Learners can use the abbreviations in their portfolios for cross-referencing purposes.

Learners can also use one piece of evidence to prove their knowledge, skills and understanding across different assessment criteria and/or across different units. It is not necessary for learners to have each assessment criterion assessed separately. They should be encouraged to reference evidence to the relevant assessment criteria. However, the evidence provided for each unit must be clearly reference the unit being assessed. Evidence must be available to the assessor, the internal verifier and the Pearson standards verifier.

Any specific evidence requirements for a unit are given in the *Assessment* section of the unit.

Further guidance on the requirements for centre quality assurance and internal verification processes is available on our website at: www.edexcel.com. Please see *Section 12, Further information and useful publications* for details.

Appeals

Centres must have a policy for dealing with appeals from learners. Appeals may relate to incorrect assessment decisions or unfairly conducted assessment. The first step in such a policy is a consideration of the evidence by a Lead Internal Verifier or other member of the programme team. The assessment plan should allow time for potential appeals after learners have been given assessment decisions.

Centres must document all learners' appeals and their resolutions. Further information on the appeals process can be found in the document *Enquiries and appeals about Pearson vocational qualifications policy*, which is available on our website at: www.edexcel.com/policies

Dealing with malpractice

Centres must have a policy for dealing with malpractice by learners. This policy must follow the *Pearson Assessment Malpractice Policy*, which is available on our website at: www.edexcel.com/policies. Centres must report malpractice to Pearson, particularly if any units have been subject to quality assurance or certification.

Reasonable adjustments to assessment

Centres are able to make adjustments to assessments to take account of the needs of individual learners in line with the guidance given in the document *Pearson Supplementary Guidance for Reasonable Adjustment and Special Consideration in Vocational Internally Assessed Units*. In most instances, adjustments can be achieved by following the guidance; for example allowing the use of assistive technology or adjusting the format of the evidence. We can advise you if you are uncertain as to whether an adjustment is fair and reasonable. Any reasonable adjustment must reflect the normal learning or working practice of a learner in a centre or working within the occupational area.

Further information on access arrangements can be found in the Joint Council for Qualifications (JCQ) document *Access Arrangements, Reasonable Adjustments and Special Consideration for General and Vocational qualifications*.

Both documents are on our website at: www.edexcel.com/policies

Special consideration

Centres must operate special consideration in line with the guidance given in the document *Pearson Supplementary Guidance for Reasonable Adjustment and Special Consideration in Vocational Internally Assessed Units*. Special consideration may not be applicable in instances where:

- assessment requires the demonstration of practical competence
- criteria have to be met fully
- units/qualifications confer licence to practice.

Centres cannot apply their own special consideration; applications for special consideration must be made to Pearson and can be made only on a case-by-case basis. A separate application must be made for each learner and certification claims must not be made until the outcome of the application has been received.

Further information on special consideration can be found in the Joint Council for Qualifications (JCQ) document *Access Arrangements, Reasonable Adjustments and Special Consideration for General and Vocational qualifications*.

Both of the documents mentioned above are on our website at:
www.edexcel.com/policies

Credit transfer

Credit transfer describes the process of using a credit or credits awarded in the context of a different qualification or awarded by a different awarding organisation towards the achievement requirements of another qualification. All awarding organisations recognise the credits awarded by all other awarding organisations that operate within the QCF.

If learners achieve credits with other awarding organisations, they do not need to retake any assessment for the same units. The centre must keep evidence of unit achievement. Further information on credit transfer can be found in the document *Credit accumulation and transfer policy (England)*, which is available on our website at: www.edexcel.com/policies

9 Centre recognition and approval

Centre recognition

Centres that have not previously offered Pearson vocational qualifications need to apply for and be granted centre recognition and approval as part of the process for approval to offer individual qualifications.

Existing centres will be given 'automatic approval' for a new qualification if they are already approved for a qualification that is being replaced by a new qualification and the conditions for automatic approval are met.

Guidance on seeking approval to deliver Pearson vocational qualifications is available at www.pearsonwbl.edexcel.com/qualifications-approval.

Approvals agreement

All centres are required to enter into an approval agreement, which is a formal commitment by the head or principal of a centre, to meet all the requirements of the specification and any associated codes, conditions 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.

10 Quality assurance of centres

Quality assurance is at the heart of vocational qualifications. Centres are required to declare their commitment to ensuring quality and to giving learners appropriate opportunities that lead to valid and accurate assessment outcomes.

Centres must follow quality assurance requirements for standardisation of assessors and internal verifiers and the monitoring and recording of assessment processes. Pearson uses external quality assurance procedures to check that all centres are working to national standards. It gives us the opportunity to identify and provide support to safeguard certification and quality standards. It also allows us to recognise and support good practice.

Centres offering competence-based qualifications will usually receive two standards verification visits per year (a total of two days per year). The exact frequency and duration of standards verifier visits will reflect the centre's performance, taking account of the:

- number of assessment sites
- number and throughput of learners
- number and turnover of assessors
- number and turnover of internal verifiers.

For centres offering a full BTEC Apprenticeship (i.e. all elements of the Apprenticeship are delivered with Pearson through registration of learners on a BTEC Apprenticeship framework) a single standards verifier will normally be allocated to verify all elements of the BTEC Apprenticeship programme. Centres should make use of our one-click learner registration to access this facility. If a centre is also offering stand-alone NVQs/Competence-based qualifications in the same sector as a full BTEC Apprenticeship, the same standards verifier should be allocated. If a centre is also offering stand-alone BTEC qualifications in the same sector as a full BTEC Apprenticeship, a different quality assurance model applies.

In order for certification to be released, confirmation is required that the National Occupational Standards (NOS) for assessment and verification, and for the specific occupational sector are being met consistently.

For further details, please go to the *NVQ Quality Assurance Centre Handbook*, the *BTEC Apprenticeships Quality Assurance Handbook* and the *Pearson Edexcel NVQs, SVQs and competence-based qualifications – Delivery Requirements and Quality Assurance Guidance* on our website at www.pearsonwbl.edexcel.com

11 Unit format

Each unit has the following sections.

Unit title

The unit title is on the QCF and this form of words will appear on the learner's Notification of Performance (NOP).

Unit reference number

Each unit is assigned a unit reference number that appears with the unit title on the Register of Regulated Qualifications.

QCF level

All units and qualifications in the QCF have a level assigned to them. There are nine levels of achievement, from Entry to Level 8. The QCF Level Descriptors inform the allocation of the level.

Credit value

All units have a credit value. When a learner achieves a unit, they gain the specified number of credits. The minimum credit value is 1 and credits can be awarded in whole numbers only.

Guided learning hours

Guided learning hours are the times when a tutor, trainer or facilitator is present to give specific guidance towards the learning aim for a programme. This definition includes workplace guidance to support the development of practical job-related skills, tutorials and supervised study in, for example, open learning centres and learning workshops. It also includes the time spent by staff assessing learners' achievements, for example in the assessment of competence for competency-based qualifications.

Unit summary

This summarises the purpose of the unit and the learning the unit offers.

Unit assessment requirements/evidence requirements

The SSC/B set the assessment/evidence requirements. Learners must provide evidence according to each of the requirements stated in this section.

Learning outcomes

The learning outcomes set out what a learner will know, understand or be able to do as the result of a process of learning.

Assessment criteria

Descriptions of the requirements a learner is expected to meet to demonstrate that a learning outcome has been achieved.

Unit 1: Receive goods and materials into storage in a retail environment

Unit reference number: R/503/5659

QCF 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.

Unit assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

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

People1st Retail's Assessment Principles for Retail Qualifications can be found on their website (www.people1st.co.uk).

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

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

Learning outcomes		Assessment criteria			Evidence type	Portfolio reference	Date
1	Understand the importance of preparing for expected deliveries	1.1	Explain why it is necessary to prepare thoroughly to receive deliveries				
		1.2	Explain why any shortage of storage space needs to be reported promptly				
		1.3	Explain why accurate, complete and up-to-date records are needed for deliveries				
		1.4	Explain how adequate preparation helps to ensure that the health and safety requirements relating to deliveries are met				
2	Understand own responsibility for handling goods and materials	2.1	Explain the importance of handling goods and materials safely, hygienically and in ways that protect them from damage				

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Be able to prepare to receive deliveries in a retail environment	3.1	Identify: <ul style="list-style-type: none"> the quantity of the items expected the nature of the items expected the storage space needed 			
		3.2	Perform checks to ensure that enough storage space is available for expected deliveries			
		3.3	Identify the person to report any shortage of storage space to			
		3.4	Perform checks to ensure that the receiving area is clean, tidy and free from obstructions and hazards			
		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			

Learning outcomes		Assessment criteria			Evidence type	Portfolio reference	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 2: Place goods and materials into storage in a retail environment

Unit reference number: J/503/5660

QCF 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.

Unit assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

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

People1st Retail's Assessment Principles for Retail Qualifications can be found on their website (www.people1st.co.uk).

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

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

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				

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
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			
		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 3: Keep stock on sale at required levels in a retail environment

Unit reference number: L/503/5661

QCF 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.

Unit assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

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

People1st Retail's Assessment Principles for Retail Qualifications can be found on their website (www.people1st.co.uk).

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

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

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

Learner name: _____ Date: _____
 Learner signature: _____ Date: _____
 Assessor signature: _____ Date: _____
 Internal verifier signature: _____ Date: _____
 (if sampled)

Unit 4: Process customer orders for goods in a retail environment

Unit reference number: R/503/5662

QCF 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.

Unit assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

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

People1st Retail's Assessment Principles for Retail Qualifications can be found on their website (www.people1st.co.uk).

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

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

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

Learning outcomes		Assessment criteria			Evidence type	Portfolio reference	Date
4	Be able to check the availability of the goods customers want to order	4.1	Describe the available sources of supply				
		4.2	Check the availability of goods and the terms and conditions of supply				
		4.3	Offer alternative options to customers if the required goods are not currently in stock				
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 5: Process returned goods in a retail environment

Unit reference number: Y/503/5663

QCF 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.

Unit assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

Simulation is not allowed for any performance evidence in 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.

People1st Retail's Assessment Principles for Retail Qualifications can be found on their website (www.people1st.co.uk).

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

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

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

Unit reference number: D/503/5664

QCF 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.

Unit assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

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

People1st Retail's Assessment Principles for Retail Qualifications can be found on their website (www.people1st.co.uk).

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

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1	Know how to sort donated goods safely			
2	Be able to sort donated goods for selling or recycling	1.1	Outline the organisational safety requirements that apply to sorting donated goods	
		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 7: Place goods and materials into storage in a retail environment

Unit reference number: H/503/5665

QCF 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.

Unit assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

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

People1st Retail's Assessment Principles for Retail Qualifications can be found on their website (www.people1st.co.uk).

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

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

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 8: Hand-process fish in a retail environment

Unit reference number: K/503/5666

QCF 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.

Unit assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

Simulation is not allowed for any performance evidence in 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.

People1st Retail's Assessment Principles for Retail Qualifications can be found on their website (www.people1st.co.uk).

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

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

Learning outcomes		Assessment criteria			Evidence type	Portfolio reference	Date
1	Understand safe working practices in relation to hand-processing fish	1.1	Explain the importance of hygiene in relation to hand-processing fish				
		1.2	Describe the organisation's hygiene policy relating to hand-processing fish				
		1.3	Describe safe working practices relating to hand-processing fish				
		1.4	Explain the importance of following safe working practices when hand-processing fish				
		1.5	Explain the dangers and disadvantages of using unsafe and blunt tools to hand-process fish				
		1.6	Describe possible types of accident and injury associated with hand-processing fish				
		1.7	Describe organisational procedures for dealing with accidents and injuries that occur when hand-processing fish				
		1.8	Explain the importance of following the organisation's cleaning schedule for the area where fish is hand-processed				
2	Understand the relationship between the anatomy of fish and the way fish are hand-processed	2.1	Explain how the arrangement of body parts of a flat fish differs from that of a round fish				
		2.2	Explain how the different arrangement of body parts affects the way that flat and round fish are hand-processed				

Learning outcomes		Assessment criteria			Evidence type	Portfolio reference	Date
3	Be able to hand-process fish	3.1	Perform checks to ensure that the fish to be prepared is of saleable quality				
		3.2	Hand-process fish in ways that attempt to: <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 				
		3.3	Place processed products that meet organisational specifications into containers that will keep them in a saleable condition				
	4	Be able to maintain own work area in a condition fit for hand-processing fish	4.1	Organise own work area, equipment and tools to enable fish to be hand-processed safely, hygienically and efficiently			
4.2			Maintain hygienic working conditions when handling fish				
4.3			Dispose of waste from the hand-processing of fish in ways that meet legal and organisational requirements				
4.4			Clean and tidy own work area, tools and equipment after hand-processing fish, in accordance with the organisation's cleaning schedule				

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(if sampled)

Unit 9: Process greengrocery products for sale in a retail environment

Unit reference number: M/503/5667

QCF 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.

Unit assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

Simulation is not allowed for any performance evidence in 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.

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

- vegetables
- fruit
- salad.

People1st Retail's Assessment Principles for Retail Qualifications can be found on their website (www.people1st.co.uk).

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

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

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				
		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				

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
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 10: Finish meat products by hand in a retail environment

Unit reference number: T/503/5668

QCF 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.

Unit assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

Simulation is not allowed for any performance evidence in 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.

People1st Retail's Assessment Principles for Retail Qualifications can be found on their website (www.people1st.co.uk).

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

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

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	1.1	Perform checks to ensure that the meat products to be processed meet the organisation's quality specifications				
		1.2	State reasons for rejecting meat products at the checking stage				
		1.3	Deal with meat products rejected during the checking process: <ul style="list-style-type: none"> • safely • hygienically, including keeping them separate from other meat products 				
		1.4	Keep meat products at the specified temperatures during handling, transfer and storage				
		1.5	Explain why meat should be held at the specified temperatures				
		1.6	Keep records of the checking process, in line with organisational procedures				

Learning outcomes	Assessment criteria			Evidence type	Portfolio reference	Date
2 Be able to organise own work area and equipment for finishing meat products in a retail environment	2.1	Organise own work area to meet organisational requirements for: <ul style="list-style-type: none"> • health and safety • food safety • finishing meat products as instructed 				
	2.2	Select hand tools that are suited to specific meat finishing tasks				
	2.3	State potential dangers associated with particular tools and equipment				
	2.4	Prepare meat finishing tools and equipment in line with organisational safety and processing requirements				
	2.5	Deal with faulty meat finishing tools and equipment in line with organisational procedures				
	2.6	Clean meat finishing tools and equipment after use in line with organisational safety and processing requirements				
	2.7	Store meat finishing tools and equipment after cleaning in the designated places				

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
3 Be able to achieve meat product yield and finish in a retail environment	3.1 Organise own meat finishing work in line with organisational finishing instructions			
	3.2 Finish meat products: <ul style="list-style-type: none"> • within the time allowed • achieving the organisational specification for the finished product • achieving the product yield required 			
	3.3 Deal with meat products rejected from the finishing process in line with organisational procedures			
	3.4 Store finished products in line with organisational procedures			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(if sampled)

Unit 11: Audit stock levels and stock inventories in a retail environment

Unit reference number: A/503/5669

QCF level: 3

Credit value: 6

Guided learning hours: 28

Unit summary

This unit assesses the occupational competence of individuals who are responsible for organising and implementing stock audits. The audit team may consist of people who do not normally work together, and the learner need not necessarily be a team leader in their day-to-day work.

Unit assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

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

People1st Retail's Assessment Principles for Retail Qualifications can be found on their website (www.people1st.co.uk).

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 verifier.

Learning outcomes and assessment criteria

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

Learning outcomes		Assessment criteria			Evidence type	Portfolio reference	Date
1	Be able to implement a stock audit in a retail environment	1.1	Explain the importance of auditing levels of stock and stock inventories				
		1.2	Plan an audit of stock that: <ul style="list-style-type: none"> • will ensure accurate, complete and timely auditing • will cause as little disruption as possible to normal work • includes plans for dealing with contingencies 				
		1.3	Negotiate with colleagues to obtain staff who have the necessary skills to help with the audit				
		1.4	Allocate specific responsibilities to each member of the audit team				
		1.5	Explain to the audit team what they are expected to do				
		1.6	Diagnose and resolve problems that arise when implementing the audit				

Learning outcomes		Assessment criteria			Evidence type	Portfolio reference	Date
2	Be able to use the findings of an audit to identify and resolve problems with stock levels and stock inventories	2.1	Analyse the findings of a stock audit to identify problems that need resolving				
		2.2	Prioritise problems according to their importance and urgency				
		2.3	Investigate and resolve problems: <ul style="list-style-type: none"> • methodically • as far as possible within the scope of the audit and with the resources available 				
3	Be able to communicate the results of an audit	3.1	Clarify audit findings, including any unresolved problems, in a timely fashion for those who need the information				

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(if sampled)

Unit 12: Place goods and materials into storage in a retail environment

Unit reference number: T/503/5671

QCF level: 3

Credit value: 10

Guided learning hours: 52

Unit summary

This unit assesses the occupational competence of someone who orders stock for a retail store and is responsible for choosing the store's suppliers as well as ordering stock directly from suppliers.

Unit assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

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

People1st Retail's Assessment Principles for Retail Qualifications can be found on their website (www.people1st.co.uk).

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

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

Learning outcomes		Assessment criteria			Evidence type	Portfolio reference	Date
1	Understand the role of suppliers when sourcing goods and services	1.1	Explain how suppliers' terms and conditions can affect the profitability of a retail business				
		1.2	Explain the organisation's legal rights as a purchaser of goods and services, including rights relating to returns, replacements and refunds				
		1.3	Explain what constitutes a legally binding contract between retailer and supplier				
2	Be able to source required goods and services	2.1	Interpret stock records to establish: <ul style="list-style-type: none"> • which stock needs replenishing • the quantity of stock required 				
			Evaluate the service offered by suppliers, taking account of: <ul style="list-style-type: none"> • the availability of the required goods and services • the terms and conditions offered by suppliers 				

Learning outcomes		Assessment criteria			Evidence type	Portfolio reference	Date
3	Be able to order goods and services	3.1	Analyse purchase requisitions to identify items that can be ordered together				
		3.2	Order goods and services: <ul style="list-style-type: none"> of the required type and quantity allowing sufficient time for delivery 				
		3.3	Develop procedures that will enable colleagues to give sufficient notice of any special orders for goods and services				
		3.4	Resolve overdue or incomplete orders with the supplier				
		3.5	Arrange returns, replacements and refunds when applicable				
		3.6	Explain the options available when orders cannot be fulfilled on time				
		3.7	Maintain purchasing records that are in line with organisational procedures				
4	Be able to evaluate the performance of suppliers of stock for retail sale	4.1	Evaluate the quality, price and timeliness of deliveries against the organisation's requirements				
		4.2	Evaluate colleagues' feedback about suppliers' performance to determine if the standard of performance is acceptable				
		4.3	Provide feedback to suppliers on the level of service they provide				

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

QCF level: 2

Credit value: 10

Guided learning hours: 48

Unit summary

This unit assesses the occupational competence of individuals who process dough in 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.

Unit assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

Simulation is not allowed for any performance evidence in 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.

People1st Retail's Assessment Principles for Retail Qualifications can be found on their website (www.people1st.co.uk).

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

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

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			

Learning outcomes	Assessment criteria		Evidence type	Portfolio reference	Date
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 			
	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

QCF 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 in the Retail Skills qualifications for learners who work in supermarket in-store bakeries.

Unit assessment requirements/evidence requirements

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 assessment strategy for Improve proficiency qualifications in food and drink sets out the overarching assessment requirements.

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

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

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				

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
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			
		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

QCF 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 in the Retail Skills qualifications for learners who work in supermarket in-store bakeries.

Unit assessment requirements/evidence requirements

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 through 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.

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

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

Learning outcomes		Assessment criteria			Evidence type	Portfolio reference	Date
1	Hand-divide fermented dough to specifications and instructions	1.1	Check the dough meets the specification and instructions				
		1.2	Take action on discovering any discrepancy between dough and the specification				
		1.3	Check the condition of dividing tools and the accuracy of equipment				
		1.4	Hand-divide dough				
		1.5	Minimise waste and deal with scrap material				
		1.6	Position divided dough portions for further processing				
2	Hand-mould and shape fermented dough	2.1	Check the portioned dough meets instructions and the specification				
		2.2	Take action on discovering any discrepancy between portioned dough and the specification				
		2.3	Prepare and maintain table surface for moulding and shaping				
		2.4	Hand-mould and shape portioned dough				
		2.5	Wash and dress shaped dough surfaces according to specification				
		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: Place goods and materials into storage in a retail environment

Unit reference number: F/503/5673

QCF 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.

Unit assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

Simulation is not allowed for any performance evidence in 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. People1st Retail's Assessment Principles for Retail Qualifications can be found on their website (www.people1st.co.uk).

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

Accessories	Additional items apart from clothing and jewellery, for example, false nails
Indicators of potential food safety hazards	Things which could make food unsatisfactory for consumers, for example: <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	Clothing the organisation provides for the learner, which could include: <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	Right times to wash hands would include: <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

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

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

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	3.1	Keep own hair, skin, nails and clothing in a suitable condition for working with food				
		3.2	Remove any jewellery and other accessories that could cause food safety hazards				
		3.3	Ensure that any protective clothing the organisation provides for own use is: <ul style="list-style-type: none"> worn in line with organisational requirements changed when the organisation says it should be 				
		3.4	Wash own hands: <ul style="list-style-type: none"> at the right times to keep them in a suitable condition for working with food using effective methods 				
		3.5	Demonstrate safe behaviour that helps prevent contamination to the food being worked with				
		3.6	Identify the person to whom to report any open wounds, skin infections and infectious illnesses				
4	Be able to deal with indicators of potential food safety hazards in a retail environment	4.1	Identify obvious indicators of potential food safety hazards in the workplace				
		4.2	Deal with potential food safety hazards by: <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

QCF 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.

Unit assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

Simulation is not allowed for any performance evidence in 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 candidate 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 the glossary below.

People1st Retail's Assessment Principles for Retail Qualifications can be found on their website (www.people1st.co.uk).

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

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 (for example the juices of raw meat dripping on to cooked meat stored on a lower shelf) or indirect contact (via the hands, clothing, cloths, equipment or other surfaces)2 the cross-contamination of foods containing specific allergens (for example nuts, milk, eggs) with other food (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	<p>When food goes bad and has a noticeable change in its taste, smell or appearance</p>
Infestation	<p>The presence of pests such as insects or rodents in the workplace which put food safety at risk</p>
Procedures	<p>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</p>
Specified temperatures	<p>Temperatures specified by relevant legislation or in own organisation's procedures</p>

Learning outcomes and assessment criteria

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

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

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
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			
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: Monitor and help improve food safety in a retail environment

Unit reference number: L/503/5675

QCF level: 3

Credit value: 11

Guided learning hours: 50

Unit summary

This unit assesses certain aspects of the occupational competence needed to ensure the safe handling or preparation of food in a retail environment. The food concerned may be wrapped or unwrapped, and may include food subject to temperature control. The unit covers monitoring critical control points and using the findings of those monitoring activities to improve the processes that affect food safety.

Unit assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

Simulation is not allowed for any performance evidence in 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 candidate 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 the glossary below.

People1st Retail's Assessment Principles for Retail Qualifications can be found on their website (www.people1st.co.uk).

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

Control measures	Actions required to prevent or eliminate a food safety hazard or reduce it to an acceptable level
Control point	A step in the food preparation process which can be controlled, but would not result in an unacceptable health risk if control was not exercised
Corrective action	The action to be taken when a critical limit is breached
Critical control point	A step in the food control or preparation process where a food safety hazard must be dealt with by preventing it, removing it or reducing it to an acceptable level
Critical limit	The minimum and maximum limits allowed in order to control a particular task or process
Food safety hazards	Something which may cause harm to the consumer and can be: <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 safety management	Putting into practice the policies, procedures, practices, controls and documentation that ensure that food is safe for consumers
Procedures	A series of clear steps or instructions on how to do things; rules. Some companies document their procedures formally in writing, and others simply have procedures that all staff understand and follow but which are not written down
Training	Bringing an individual up to a desired level or standard of proficiency. This can be done by means of instruction or by formal training courses
Variance	The difference between the planned or standard limits allowed and the actual values monitored
Verification	Using a selection of methods, procedures and tests to show and confirm that the system is operating in line with the plan

Learning outcomes and assessment criteria

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Understand the principles of food safety management that apply to a retail environment	1.1 Explain the following terms in relation to own organisation: <ul style="list-style-type: none"> • 'critical control points' • 'control points' • 'critical limits' • 'variance' 			
	1.2 Explain the importance of monitoring critical control points and control points			
	1.3 Explain the impact of variance at critical control points and control points on food safety, public health and the organisation			
	1.4 Explain why traceability is important to food safety			
	1.5 Explain how traceability works			
	1.6 Explain the importance of having organisational food safety procedures in place			

Learning outcomes		Assessment criteria			Evidence type	Portfolio reference	Date
2	Be able to monitor critical control points in a retail environment	2.1	Select relevant food safety control measures when monitoring critical control points				
		2.2	Implement all specified organisational operational controls and checks of critical control points at the set time frequency				
		2.3	Maintain records of monitoring activities in line with organisational procedures				
		2.4	Obtain verification for completed checks, following organisational procedures				
3	Be able to deal with problems identified when monitoring critical control points in a retail environment	3.1	Take corrective action when control measures fail, ensuring that such action is: <ul style="list-style-type: none"> suited to the situation carried out with a degree of urgency that matches the seriousness of the situation 				
		3.2	Report to the designated person any procedures that are out of line with critical limits				
		3.3	Seek expert advice and support for problems identified when monitoring critical control points that are outside own level of authority or expertise to resolve				
4	Be able to ensure that staff perform to the standard required for food safety in a retail environment	4.1	Allocate food safety responsibilities to staff				
		4.2	Supervise staff to ensure that allocated food safety responsibilities are met				
		4.3	Ensure that staff receive the training in food safety that they need				

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
5	Be able to evaluate the nature and impact of factors or issues that may affect the safety of food, arising in:	5.1	<ul style="list-style-type: none"> • own work activities • the working environment • supplies • products to be sold to customers 			
		6	Be able to contribute to improving food safety in a retail environment	6.1	Explain the term 'continuous improvement' in relation to food safety	
		6.2	Explain the importance of contributing to the process of improving food safety			
		6.3	Present to decision makers ideas for improving procedures or processes that affect food safety			
		6.4	Implement new or revised procedures to improve food safety, where authorised to do so			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(if sampled)

Unit 19: Pick products in a retail environment to fulfil customer orders

Unit reference number: J/503/5676

QCF 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 an online store but not a warehouse.

Unit assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

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

People1st Retail's Assessment Principles for Retail Qualifications can be found on their website (www.people1st.co.uk).

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

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

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

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: _____ Date: _____
(if sampled)

Unit 20: Load orders for despatch from a retail store to customers

Unit reference number: Y/503/5677

QCF 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.

Unit assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

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

People1st Retail's Assessment Principles for Retail Qualifications can be found on their website (www.people1st.co.uk).

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

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

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

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
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 21: Check stock levels and sort out problems with stock levels in a retail environment

Unit reference number: D/503/5678

QCF 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.

Unit assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

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

People1st Retail's Assessment Principles for Retail Qualifications can be found on their website (www.people1st.co.uk).

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

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

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 22: Maintain moisture levels for crops or plants

Unit reference number: R/502/0854

QCF 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 in the Retail Skills qualifications for learners who work in garden centres.

Unit assessment requirements/evidence requirements

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

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

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

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 23: Place goods and materials into storage in a retail environment

Unit reference number: L/502/0853

QCF 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 in the Retail Skills qualifications for learners who work in garden centres.

Assessment requirements/evidence requirements

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

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

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

Learning outcomes		Assessment criteria			Evidence type	Portfolio reference	Date
1	Know how nutrient requirements vary and their method of application	1.1	Describe how nutrient requirements vary according to the crop or plant grown and stage of development				
		1.2	Describe the range of conditions in which nutrient stress can occur				
		1.3	Describe the nutrients which are commonly used in the cultivation of crops or plants				
		1.4	Describe methods of providing nutrients to crops or plants				
		1.5	Describe 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 and methods of maintaining used to provide nutrients to crops or plants				
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				

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 24: Remove unwanted plant growth to maintain development

Unit reference number: Y/502/1214

QCF 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 in the Retail Skills qualifications for learners who work in garden centres.

Unit assessment requirements/evidence requirements

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

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

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

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 removed covering: <ul style="list-style-type: none"> • damaged plants • diseased material • weeds • plant debris • non-typical • dead • excessive growth • badly positioned 			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
2	<p>Know how to maintain plant development</p> <p>2.1 Describe how all the following methods can be used to maintain/control plant development:</p> <ul style="list-style-type: none"> • trimming • supporting • thinning • spacing • irrigation • growth regulators • lighting and shading • protection • pruning 			
3	<p>Know the types of equipment required and how to maintain them</p> <p>3.1 Describe the equipment which will be necessary for maintaining plant development</p> <p>3.2 Describe methods of maintaining the equipment ready for use</p>			
4	<p>Know the current health and safety legislation and environmental good practice</p> <p>4.1 Outline the current health and safety legislation, codes of practice and any additional requirements, which apply to this area of work</p> <p>4.2 Describe how environmental damage can be minimised</p> <p>4.3 Describe the correct methods for disposing of organic and inorganic waste</p> <p>4.4 Describe why it is important to maintain hygiene and how this is achieved</p>			

Learning outcomes		Assessment criteria			Evidence type	Portfolio reference	Date
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				
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 25: Identify and report the presence of pests, diseases and disorders

Unit reference number: K/502/1511

QCF 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 in the Retail Skills qualifications for learners who work in garden centres.

Unit assessment requirements/evidence requirements

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

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

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

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	Describe reasons for monitoring the crop				
		3.2	Describe when to carry out crop monitoring				
		3.3	Describe common types of pests, diseases and disorders and the problems caused				
		3.4	Describe biological controls and beneficial insects that can be used				
		3.5	Identify to whom you should report the presence and extent of pests, diseases, disorders and biological control/beneficial insects				
4	Know relevant health and safety legislation and environmental good practice	4.1	Outline the current health and safety legislation, codes of practice and any additional requirements				
		4.2	Describe how environmental damage can be minimised				
		4.3	Describe the correct methods for disposing of waste				
		4.4	Describe the health and safety risks in monitoring pests, diseases and disorders				

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(if sampled)

Unit 26: Finish bake-off food products in a retail environment

Unit reference number: H/503/5679

QCF 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.

Unit assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

Simulation is not allowed for any performance evidence in 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.

People1st Retail's Assessment Principles for Retail Qualifications can be found on their website (www.people1st.co.uk).

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

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

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 27: **Glaze, coat and decorate bake-off products for sale a retail environment**

Unit reference number: Y/503/5680

QCF 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.

Unit assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

Simulation is not allowed for any performance evidence in 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.

People1st Retail's Assessment Principles for Retail Qualifications can be found on their website (www.people1st.co.uk).

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

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

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			

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

Unit reference number: D/503/5681

QCF level: 3

Credit value: 5

Guided learning hours: 24

Unit summary

This unit assesses the occupational competence of a team leader or senior team member to manage staff to receive goods.

Unit assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

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

People1st Retail's Assessment Principles for Retail Qualifications can be found on their website (www.people1st.co.uk).

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

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date	
1 Be able to manage staff to receive and check incoming deliveries of goods in a retail environment	1.1 Select sufficient staff to prepare for, receive and check expected incoming deliveries of goods				
	1.2 Explain to staff, in advance of deliveries of goods arriving: <ul style="list-style-type: none"> • what needs to be done to prepare the receiving area • what needs to happen when the expected deliveries arrive 				
	1.3 Assess whether the area for receiving goods has been adequately prepared to ensure safe and secure unloading of goods				
	1.4 Assess whether there is enough storage space of the right type for the expected goods				
	1.5 Ensure that goods are unloaded safely and securely				
	1.6 Explain why incoming goods should be checked against requirements immediately after unloading				
	1.7 Ensure that incoming goods are checked against requirements immediately after unloading				
	1.8 Ensure that delivery records are completed in line with organisational procedures				
	1.9 Evaluate records of deliveries of goods to determine whether each supplier has met the organisation's service needs				
	1.10 Resolve problems with deliveries of goods in line with organisational procedures				

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____
(if sampled)

Date: _____

Unit 29: Organise and monitor the storage of stock in a retail environment

Unit reference number: H/503/5682

QCF level: 3

Credit value: 6

Guided learning hours: 27

Unit summary

This unit assesses the occupational competence of a team leader or senior member of a retail team who is responsible for monitoring the quality of stock and use of storage facilities.

Unit assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

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

People1st Retail's Assessment Principles for Retail Qualifications can be found on their website (www.people1st.co.uk).

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

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand the causes and prevention of stock loss within storage systems	1.1	Explain the causes of stock deterioration, loss and damage			
		1.2	Explain how to reduce stock loss within storage systems			
2	Understand the legal and organisational requirements for storing stock	2.1	Explain the legal and organisational requirements for storing stock, including health and safety requirements and the removal of out-of-date stock			

Learning outcomes	Assessment criteria		Evidence type	Portfolio reference	Date
3	3.1	Organise storage facilities to take account of: <ul style="list-style-type: none"> • day-to-day work • safety requirements • the need to keep stock secure • the need to keep stock in a saleable condition 			
	3.2	Train staff to use the storage system: <ul style="list-style-type: none"> • securely • safely • in line with relevant legal requirements 			
	3.3	Assign staff clear roles and responsibilities for storing and moving stock			
	3.4	Develop plans to cope with unforeseen storage problems that take account of available resources			
	3.5	Review plans for coping with unforeseen storage problems			
	3.6	Revise plans to cope with unforeseen storage problems, taking account of any relevant factors			
	3.7	Monitor storage operations to ensure that staff are storing and moving stock: <ul style="list-style-type: none"> • securely • safely • in line with relevant legal requirements 			
	3.8	Maintain stock records that are in line with organisational procedures			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
4	Be able to monitor the storage and care of stock in a retail environment	4.1	Maintain a routine that meets the organisation's requirements for checking the quality of storage facilities and stock			
		4.2	Perform spot checks of storage facilities and stock			
		4.3	Train staff to: <ul style="list-style-type: none"> identify stock that is out of date or at risk of deteriorating deal with stock that is out of date or at risk of deteriorating in line with legal requirements and organisational procedures 			
		4.4	Monitor the storage and movement of stock to make sure that stock is reaching the shop floor as it is needed			
		4.5	Recommend to decision makers ways of running storage and stock movement systems more profitably			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(if sampled)

Unit 30: Display stock to promote sales to customers in a retail environment

Unit reference number: M/503/5684

QCF 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.

Unit assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

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

People1st Retail's Assessment Principles for Retail Qualifications can be found on their website (www.people1st.co.uk).

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

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

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			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
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 			
		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 31: Help customers to choose products in a retail environment

Unit reference number: T/503/5685

QCF 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.

Unit assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

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

People1st Retail's Assessment Principles for Retail Qualifications can be found on their website (www.people1st.co.uk).

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

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

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	<ul style="list-style-type: none"> • Ask customers questions to find out: • what they are looking for • which product features and benefits interest them 			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
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			
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 32: Carry out promotional campaigns in a retail environment

Unit reference number: A/503/5686

QCF 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.

Unit assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

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

People1st Retail's Assessment Principles for Retail Qualifications can be found on their website (www.people1st.co.uk).

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

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

Learning outcomes		Assessment criteria			Evidence type	Portfolio reference	Date
1	Understand opportunities to promote particular products	1.1	Explain how seasonal trends affect opportunities for sales of the products within own area of responsibility				
		1.2	Explain how to recognise potential opportunities for increasing sales of particular products				
		1.3	Evaluate the potential of different promotional opportunities to increase sales				
		1.4	Explain how promotional sales can lead to future sales				
2	Be able to promote products to customers as part of a promotional campaign	2.1	Promote offers to encourage sales when interacting with customers				
3	Be able to contribute to the evaluation of a promotional campaign	3.1	Record information about the effectiveness of a promotional campaign, ensuring the information is: <ul style="list-style-type: none"> • relevant to the campaign • accurate 				
		3.2	Communicate the recorded information of a promotional campaign: <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 33: Deal with customer queries and complaints in a retail environment

Unit reference number: F/503/5687

QCF 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.

Unit assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

Simulation is not allowed for any performance evidence in 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: this 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.

People1st Retail's Assessment Principles for Retail Qualifications can be found on their website (www.people1st.co.uk).

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

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

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			

Learning outcomes		Assessment criteria			Evidence type	Portfolio reference	Date
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				
		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				

Learning outcomes		Assessment criteria			Evidence type	Portfolio reference	Date
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 34: Demonstrate products to customers in a retail environment

Unit reference number: J/503/5688

QCF 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.

Unit assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

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

People1st Retail's Assessment Principles for Retail Qualifications can be found on their website (www.people1st.co.uk).

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

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

Learning outcomes		Assessment criteria			Evidence type	Portfolio reference	Date
1	Understand how product demonstrations can help to increase sales	1.1	Explain the importance of knowing the difference between the 'features' and 'benefits' of products when demonstrating them				
		1.2	Explain how demonstrating the features and benefits of products can help to promote and sell them				
		1.3	Explain the importance of organising product demonstrations into logical steps and stages				
2	Be able to make the preparations needed to ensure a safe and efficient product demonstration	2.1	Take the necessary safety precautions before, during and immediately after demonstrating products				
		2.2	Perform checks to ensure that all the equipment and products needed for the product demonstration are to hand before starting the demonstration				

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Be able to communicate to customers the features and benefits of the products being demonstrated	3.1	Demonstrate products: <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 			
		3.2	Provide accurate supporting commentary as needed that explains to customers the features and benefits of the product being demonstrated			
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 35: Process payments for purchases in a retail environment

Unit reference number: L/503/5689

QCF level: 2

Credit value: 4

Guided learning hours: 17

Unit summary

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

Unit assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

Simulation is not allowed for any performance evidence in 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.

People1st Retail's Assessment Principles for Retail Qualifications can be found on their website (www.people1st.co.uk).

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

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

Learning outcomes		Assessment criteria			Evidence type	Portfolio reference	Date
1	Understand legal and organisational requirements for processing payments in a retail environment	1.1	Explain the customer's rights and the organisation's duties and responsibilities in relation to the pricing of goods				
		1.2	Explain how own organisation deals with suspected fraud				
2	Be able to process payments for purchases in a retail environment	2.1	Resolve pricing problems by: <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 				
		2.2	Tell customers the correct amount to pay, taking account of any special offers or discounts that apply				
		2.3	Process payments in line with organisational procedures, where the payment is acceptable				
		2.4	Explain how to tell customers tactfully that payment cannot be approved				
		2.5	Offer any additional services to customers				
		2.6	Treat customers politely throughout the payment process				
		2.7	Acknowledge other customers who are waiting to pay or to be helped in some way				

Learner name: _____ Date: _____
Learner signature: _____ Date: _____
Assessor signature: _____ Date: _____
Internal verifier signature: _____ Date: _____
(if sampled)

Unit 36: Process applications for credit agreements offered in a retail environment

Unit reference number: F/503/5690

QCF 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 store credit cards) in a retail environment, where such applications are for the purpose of purchasing particular items.

Unit assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

Simulation is not allowed for any performance evidence in 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.

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.

People1st Retail's Assessment Principles for Retail Qualifications can be found on their website (www.people1st.co.uk).

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

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

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				
3	Be able to process applications for credit agreements offered in a retail environment	2.1	Explain the legal requirements relating to credit checks and authorisation				
		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 37: Promote loyalty schemes to customers in a retail environment

Unit reference number: J/503/5691

QCF 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.

Unit assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

Simulation is not allowed for any performance evidence in 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.

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.

People1st Retail's Assessment Principles for Retail Qualifications can be found on their website (www.people1st.co.uk).

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

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

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			
3	Be able to communicate to customers the features and benefits of the organisation's loyalty scheme	3.1	Ask customers questions to determine: <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 			
		3.2	Describe to customers the benefits to them of joining the loyalty scheme, including any current special offers relating to the scheme			
		3.3	Respond to any customer queries concerning the loyalty scheme while highlighting the benefits of joining it			
		3.4	Provide customers with any information they need about the scheme to help them to decide whether to join it			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
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 38: Maintain the availability of goods on display in a retail environment to promote sales

Unit reference number: L/503/5692

QCF level: 3

Credit value: 6

Guided learning hours: 30

Unit summary

This unit assesses the occupational competence of individuals who are responsible for organising staff to set up and maintain displays. The learner does not need specialist visual merchandising skills to achieve this unit.

Unit assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

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

People1st Retail's Assessment Principles for Retail Qualifications can be found on their website (www.people1st.co.uk).

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

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

Learning outcomes		Assessment criteria			Evidence type	Portfolio reference	Date
1	Understand how the display of goods can promote sales	1.1	Explain how different types of display help the store to reach its sales targets				
		1.2	Explain how the way that information is positioned within displays can help to promote sales				
		1.3	Explain how the layout of the selling area affects sales				
2	Understand legal and organisational requirements for displaying goods	2.1	Explain the organisational and legal requirements for displaying descriptions and prices of goods				
		2.2	Explain the organisation's standards for putting displays together, including standards for cleaning and preparation				
		2.3	Explain the security, health and safety requirements and procedures relating to displaying goods				
		2.4	Explain customers' legal rights in relation to the display of goods				

Learning outcomes		Assessment criteria			Evidence type	Portfolio reference	Date
3	Be able to organise staff to display goods for retail sale	3.1	Explain to staff the purpose of the display and the requirements and standards it must meet, including standards for health and safety and security				
		3.2	Ask staff questions to check their understanding of the requirements and standards for the display				
		3.3	Ensure that staff prepare the display area: <ul style="list-style-type: none"> • safely • with the minimum of inconvenience to customers 				
		3.4	Ensure that staff put the display together: <ul style="list-style-type: none"> • safely • with the minimum of inconvenience to customers 				
		3.5	Explain the importance of consulting an authorised decision-maker before modifying or changing the display				
		3.6	Ensure that the records kept of displays are in line with organisational procedures				

Learning outcomes		Assessment criteria			Evidence type	Portfolio reference	Date
4	Be able to evaluate the effectiveness of displays	4.1	Evaluate the effectiveness of displays in relation to: <ul style="list-style-type: none"> • their intended purpose • legal and organisational requirements and standards 				
		4.2	Evaluate information within displays to ensure that its content and position are: <ul style="list-style-type: none"> • legally compliant • likely to promote sales 				
		4.3	Ask staff for suggestions for making the display more appealing to customers				
		4.4	Explain the importance of dealing promptly with any risks to security or health and safety that arise when evaluating displays				
5	Be able to maintain the required quantity and quality of goods on display	5.1	Provide accurate, up-to-date pricing information to the staff who need it				
		5.2	Monitor price marking to ensure that it is correct				
		5.3	Resolve any pricing problems that arise				
		5.4	Develop stock replenishment plans to maintain the required quantity and quality of goods on display				
		5.5	Organise the removal of stock of unsaleable quality from display				

Learner name: _____ Date: _____
Learner signature: _____ Date: _____
Assessor signature: _____ Date: _____
Internal verifier signature: _____ Date: _____
(if sampled)

Unit 39: Manage the payment transaction process in a retail environment

Unit reference number: R/503/5693

QCF level: 3

Credit value: 9

Guided learning hours: 43

Unit summary

This unit assesses the occupational competence of individuals who are responsible for managing the way payments are processed by staff at point of sale in a retail environment.

Unit assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

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

People1st Retail's Assessment Principles for Retail Qualifications can be found on their website (www.people1st.co.uk).

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

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

Learning outcomes		Assessment criteria			Evidence type	Portfolio reference	Date
1	Be able to monitor payment transaction processing in a retail environment	1.1	Explain the aims that takings practices and procedures are designed to achieve				
		1.2	Monitor the way staff process payment transactions, ensuring they are processed: <ul style="list-style-type: none"> in line with organisational processing requirements in ways that attempt to maintain goodwill 				
		1.3	Perform checks to ensure that equipment is providing information concerning payment transactions that is: <ul style="list-style-type: none"> up to date accurate 				
		1.4	Follow organisational procedures to take action to resolve any instances of: <ul style="list-style-type: none"> payment transaction processing not meeting organisational processing requirements payment transactions not being processed in ways that attempt to maintain goodwill out of date or inaccurate information 				

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	Be able to manage the operation of payment points in a retail environment	2.1	Perform checks to ensure that staff set up and operate payment points in line with organisational procedures			
		2.2	Resolve any operational problems with payment points when within own authority to do so			
		2.3	Monitor the way that payments are handled, ensuring that staff are following organisational procedures			
		2.4	Develop contingency plans to deal with unexpected problems at payment points			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(if sampled)

Unit 40: Provide a bra-fitting service in a retail environment

Unit reference number: Y/503/5694

QCF 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.

Unit assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

Simulation is not allowed for any performance evidence in 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.

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.

People1st Retail's Assessment Principles for Retail Qualifications can be found on their website (www.people1st.co.uk).

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

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

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 			

Learning outcomes		Assessment criteria			Evidence type	Portfolio reference	Date
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				
		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 co-ordinating 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				

Learning outcomes		Assessment criteria			Evidence type	Portfolio reference	Date
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				
		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				

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

Learner name: _____ Date: _____
Learner signature: _____ Date: _____
Assessor signature: _____ Date: _____
Internal verifier signature: _____ Date: _____
(if sampled)

Unit 41: Follow guidelines for planning and preparing visual merchandising displays

Unit reference number: D/503/5695

QCF 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.

Unit assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

Simulation is not allowed for any performance evidence in 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 candidate may have undertaken formal visual merchandising training that may contribute to the evidence for this unit.

People1st Retail's Assessment Principles for Retail Qualifications can be found on their website (www.people1st.co.uk).

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

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

Learning outcomes		Assessment criteria			Evidence type	Portfolio reference	Date
1	Understand the importance of visual merchandising displays and design briefs	1.1	Explain the role of visual merchandising displays in marketing, promotional and sales campaigns and activities				
		1.2	Explain the importance of the design brief in creating visual merchandising displays				
2	Understand the selection of approaches and effects in visual merchandising displays	2.1	Explain why different approaches are needed for displays of different types of merchandise				
		2.2	Explain how light, colour, texture, shape and dimension combine to achieve different effects				
3	Understand the sourcing of merchandise and props to be featured in visual merchandising displays	3.1	Explain how to use a design brief to identify the items needed for a display				
		3.2	Explain how different types of merchandise and props can attract customers' attention				
		3.3	Explain the importance of updating stock records to account for merchandise on display				

Learning outcomes		Assessment criteria			Evidence type	Portfolio reference	Date
4	Be able to plan visual merchandising displays to fulfil a design brief	4.1	Select display locations that enable the design brief to be fulfilled				
		4.2	Create ideas for improving the visual effect of displays, ensuring such ideas: <ul style="list-style-type: none"> • create the required effect • are within the limits of the design brief • 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	5.1	Agree alternative selections of merchandise and props with the designated person, when those originally specified are unavailable or unsuitable				
		5.2	Agree arrangements with suppliers for delivery of merchandise and props				
		5.3	Plan enough time for deliveries of merchandise and props to arrive before the display must be installed				
		5.4	Check the progress of deliveries of merchandise and props				
		5.5	Take action to resolve the situation when delays to deliveries of merchandise and props seem likely				
		5.6	Update stock records to account for merchandise on display				

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(if sampled)

Unit 42: Dress visual merchandising displays to attract customers

Unit reference number: H/503/5696

QCF 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.

Unit assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

Simulation is not allowed for any performance evidence in 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 candidate may have undertaken formal visual merchandising training that may contribute to the evidence for this unit.

People1st Retail's Assessment Principles for Retail Qualifications can be found on their website (www.people1st.co.uk).

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

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

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				

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

Learner name: _____ Date: _____
Learner signature: _____ Date: _____
Assessor signature: _____ Date: _____
Internal verifier signature: _____ Date: _____
(if sampled)

Unit 43: Order and position signage and graphics for visual merchandising displays

Unit reference number: K/503/5697

QCF 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.

Unit assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

Simulation is not allowed for any performance evidence in 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 candidate 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.

People1st Retail's Assessment Principles for Retail Qualifications can be found on their website (www.people1st.co.uk).

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

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

Learning outcomes		Assessment criteria			Evidence type	Portfolio reference	Date
1	Understand the role of signage and graphics within visual merchandising	1.1	Explain the purpose of signage in visual merchandising				
		1.2	Explain how signage can contribute to the effectiveness of visual merchandising				
		1.3	Explain the purpose of graphics in visual merchandising				
		1.4	Explain how graphics can contribute to the effectiveness of visual merchandising				
2	Be able to source signage and graphics to meet visual merchandising needs	2.1	Describe to suppliers the signage and graphics required by the design brief				
		2.2	Order signage and graphics: <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 				
		2.3	Monitor the progress of orders for signage and graphics				
		2.4	Assess signage and graphics when these are delivered, to ensure they meet the agreed requirements				

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 44: Dismantle and store props and graphics from visual merchandising displays

Unit reference number: M/503/5698

QCF 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.

Unit assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

Simulation is not allowed for any performance evidence in 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 candidate may have undertaken formal visual merchandising training that may contribute to the evidence for this unit.

People1st Retail's Assessment Principles for Retail Qualifications can be found on their website (www.people1st.co.uk).

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

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

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)

Unit 45: Make props and decorate fixtures and panels for visual merchandising displays

Unit reference number: T/503/5699

QCF level: 2

Credit value: 10

Guided learning hours: 45

Unit summary

This unit assesses the occupational competence of individuals who make props and decorate fixtures and panels for displays under the supervision of visual merchandising specialists.

Unit assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

Simulation is not allowed for any performance evidence in 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 candidate may have undertaken formal visual merchandising training that may contribute to the evidence for this unit.

People1st Retail's Assessment Principles for Retail Qualifications can be found on their website (www.people1st.co.uk).

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

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

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 				
3	Be able to make props for use in visual merchandising displays	3.1	Select techniques, materials, tools and equipment that are suited to making the props specified in the design brief				
		3.2	Produce final versions of props, ensuring they: <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 				

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
4	Be able to decorate fixtures and panels for visual merchandising displays	4.1	Select decorative techniques and materials that: <ul style="list-style-type: none"> • attempt to create the visual effect required by the design brief • are within cost limits 			
		4.2	Use tools, equipment and materials for decorative work in line with organisational procedures			
		4.3	Produce finished decorative work that: <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 46: Assemble visual merchandising displays

Unit reference number: D/503/5700

QCF 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.

Unit assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

Simulation is not allowed for any performance evidence in 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 candidate may have undertaken formal visual merchandising training that may contribute to the evidence for this unit.

People1st Retail's Assessment Principles for Retail Qualifications can be found on their website (www.people1st.co.uk).

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

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

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 				
			Make adjustments to assembled displays to achieve creative effects within limits of own authority and the guidelines provided				
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 47: Choose merchandise to feature in visual merchandising displays

Unit reference number: H/503/5701

QCF level: 3

Credit value: 6

Guided learning hours: 27

Unit summary

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

Unit assessment requirements/evidence requirements

This unit assesses the occupational competence of visual merchandising specialists who are responsible for choosing the merchandise to be featured in visual merchandising displays and negotiating with decision makers regarding those displays.

Assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

Simulation is not allowed for any performance evidence in 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 candidate may have undertaken formal visual merchandising training that may contribute to the evidence for this unit.

AC 2.1: 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.

People1st Retail's Assessment Principles for Retail Qualifications can be found on their website (www.people1st.co.uk).

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

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand the purpose of featuring merchandise in visual merchandising displays	1.1	Explain the role of displays featuring merchandise in marketing, promotional and sales campaigns and activities			
		1.2	Explain the importance of being creative when selecting merchandise for displays			
2	Be able to evaluate merchandise for its display potential	2.1	<p>Evaluate the suitability of different items of merchandise for featuring in a display, with respect to:</p> <ul style="list-style-type: none"> the purpose of the display the potential of the merchandise to attract and interest customers whether the merchandise to be featured is consistent with the organisation's visual display policy the availability of the merchandise within the timescale for preparing the display the cost of obtaining the merchandise in relation to the budget available for the display 			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Be able to liaise with decision makers concerning the merchandise to be featured in a display	3.1	Explain to decision makers: <ul style="list-style-type: none"> the reasons for the choice of merchandise for display how the merchandise would feature in the display 			
		3.2	Reach an agreement with decision makers concerning the choice of merchandise before work starts on assembling the display			
		3.3	Reach agreement with decision makers concerning arrangements and timescales for the supply of merchandise			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(if sampled)

Unit 48: Manage the use of signage and graphics in visual merchandising displays

Unit reference number: K/503/5702

QCF level: 3

Credit value: 7

Guided learning hours: 31

Unit summary

This unit assesses the occupational competence of visual merchandising specialists who are responsible for specifying signage and graphics to be used in visual merchandising displays to achieve the intended effects of a design brief.

Unit assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

Simulation is not allowed for any performance evidence in 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 candidate may have undertaken formal visual merchandising training that may contribute to the evidence for this unit.

AC 4.1: 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.

People1st Retail's Assessment Principles for Retail Qualifications can be found on their website (www.people1st.co.uk).

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

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand how signage and graphics are used in visual merchandising displays	1.1	Explain how the look of signage and graphics in visual merchandising displays can attract customers			
		1.2	Explain how signage and graphics are used in visual merchandising displays to convey information to customers			
2	Understand the importance of complying with legal requirements relating to the use of signage and graphics in visual merchandising	2.1	Explain the importance of complying with legal requirements relating to the use of signage and graphics in visual merchandising displays			
3	Understand the importance of monitoring the use of signage and graphics in visual merchandising displays	3.1	Explain the importance of monitoring the use of signage and graphics in visual merchandising displays to ensure that they are being used as intended			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
4	Be able to assess the signage and graphics needed for visual merchandising displays	4.1	Assess the types and quantities of signage and graphics that will best: <ul style="list-style-type: none"> • suit the purpose of the display • meet legal requirements • comply with the organisation's visual design policy 	
		4.2	Confirm with decision makers that proposals for the use of signage and graphics are acceptable	
5	Be able to source the signage and graphics needed for visual merchandising displays	5.1	Confirm with suppliers: <ul style="list-style-type: none"> • the type of signage and graphics needed • quantities • costs • delivery dates • delivery arrangements 	
		5.2	Assess whether the signage and graphics received from suppliers meet specified requirements before they are used	
6	Be able to co-ordinate the use of signage and graphics in visual merchandising displays	6.1	Distribute signage and graphics by the deadlines agreed in the design brief to those who are responsible for putting them on display	
		6.2	Explain to colleagues how they should install signage and graphics to meet the design brief	
		6.3	Check that signage and graphics are installed in line with specifications	

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
7	Be able to monitor the use of signage and graphics in visual merchandising displays	7.1	Perform checks on visual merchandising displays to ensure that signage and graphics are still being used as intended			
		7.2	Request feedback from colleagues on the use of signage and graphics on display			
		7.3	Take corrective action when signage and graphics are not being used in line with organisational procedures or the design brief			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(if sampled)

Unit 49: Evaluate the effectiveness of visual merchandising displays

Unit reference number: M/503/5703

QCF level: 3

Credit value: 9

Guided learning hours: 46

Unit summary

This unit assesses the occupational competence of visual merchandising specialists who are responsible for evaluating the effectiveness of displays.

Unit assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

Simulation is not allowed for any performance evidence in 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 candidate may have undertaken formal visual merchandising training that may contribute to the evidence for this unit.

AC 2.1: 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.

People1st Retail's Assessment Principles for Retail Qualifications can be found on their website (www.people1st.co.uk).

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

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

Learning outcomes		Assessment criteria			Evidence type	Portfolio reference	Date
1	Understand the types of evidence used to evaluate the effectiveness of visual merchandising displays	1.1	Explain the importance of evaluating the effectiveness of visual merchandising displays				
		1.2	Explain when the effectiveness of visual merchandising displays should be evaluated				
		1.3	Explain which types of information are the most useful for evaluating the effectiveness of visual merchandising displays				
		1.4	Explain the meaning of 'validity' and 'reliability' in relation to the measurement of customers' responses to visual merchandising displays				
2	Be able to gather information about customers' responses to visual merchandising displays	2.1	Research customers' responses to visual merchandising displays, ensuring that the information gathered is: <ul style="list-style-type: none"> • valid • reliable • gathered in line with organisation's communications policy • gathered in ways that attempt to maintain the goodwill and co-operation of those providing the information 				

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Be able to analyse information from customers' responses to evaluate the effectiveness of visual merchandising displays	3.1	Agree the standards for evaluating the effect of visual merchandising displays with decision makers			
		3.2	Analyse the evidence of the effectiveness of visual merchandising displays fairly against the agreed standards			
		3.3	Evaluate the effectiveness of visual merchandising displays in terms of: <ul style="list-style-type: none"> the purpose of the display customers' responses to the display 			
		3.4	Recommend to decision makers improvements that could be made to the way visual merchandising is carried out in the store, based on the research findings and conclusions			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(if sampled)

Unit 50: Manage budgets for visual merchandising projects

Unit reference number: T/503/5704

QCF level: 3

Credit value: 10

Guided learning hours: 46

Unit summary

This unit assesses the occupational competence of visual merchandising specialists who are responsible for managing the budgets of visual merchandising projects.

Unit assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

Simulation is not allowed for any performance evidence in 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 candidate may have undertaken formal visual merchandising training that may contribute to the evidence for this unit.

People1st Retail's Assessment Principles for Retail Qualifications can be found on their website (www.people1st.co.uk).

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

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

Learning outcomes		Assessment criteria			Evidence type	Portfolio reference	Date
1	Understand the importance of controlling expenditure on visual merchandising projects	1.1	Explain the importance to the organisation of controlling expenditure on visual merchandising projects				
		2	Understand the concept of 'value for money' when managing visual merchandising projects				
3	Be able to agree costs with decision makers for visual merchandising projects	2.1	Explain what 'value for money' means when managing visual merchandising projects				
		2.2	Explain why 'value for money' does not just mean paying the lowest prices				
		3.1	Calculate estimates of the costs of proposed visual merchandising projects				
		3.2	Prepare business cases for visual merchandising project budgets that show how value for money will be achieved				
		3.3	Present budget proposals to decision makers in ways that attempt to persuade them to adopt the proposals				
		3.4	Negotiate budgets with decision makers in ways that attempt to keep them committed to the project's aims				

Learning outcomes		Assessment criteria			Evidence type	Portfolio reference	Date
4	Be able to control costs for visual merchandising projects	4.1	Explain to colleagues the cost limits they must work within on visual merchandising projects				
		4.2	Maintain accurate records of project expenditure in line with organisational procedure				
		4.3	Identify unacceptable discrepancies in project expenditure				
		4.4	Take action to resolve any discrepancies in project expenditure when this falls within own authority				
		4.5	Report unacceptable discrepancies in project costs to the designated person when resolving such discrepancies is not within own authority				
		4.6	Identify areas where value for money could have been improved within budget limits for the project				
5	Be able to keep colleagues informed on expenditure on visual merchandising projects	5.1	Keep colleagues informed on expenditure on visual merchandising projects				

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(if sampled)

Unit 51: Contribute to improving a retail organisation's visual merchandising policy

Unit reference number: A/503/5705

QCF level: 3

Credit value: 8

Guided learning hours: 36

Unit summary

This unit assesses the occupational competence of visual merchandising specialists who are expected to suggest improvements to an organisation's visual design and to ensure that staff follow the organisation's visual design policy.

Unit assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

Simulation is not allowed for any performance evidence in 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 candidate may have undertaken formal visual merchandising training that may contribute to the evidence for this unit.

'Visual merchandising/design policy': 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.

People1st Retail's Assessment Principles for Retail Qualifications can be found on their website (www.people1st.co.uk).

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

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

Learning outcomes		Assessment criteria			Evidence type	Portfolio reference	Date
1	Understand how visual merchandising and visual design can benefit an organisation	1.1	Explain how having a visual merchandising policy can help the organisation to achieve its aims				
		1.2	Explain how visual design can help to promote and sell goods and services				
		1.3	Explain what customer-focused design is				
		1.4	Explain how customer-focused design can benefit the organisation				
2	Be able to evaluate the organisation's approach to visual design	2.1	Research what internal and external customers want and expect from the visual design of the organisation				
		2.2	Analyse research findings to identify internal and external customers' wishes and expectations concerning visual design in the organisation				
		2.3	Evaluate whether current and recent visual designs used in the organisation meet internal and external customers' wishes and expectations				
3	Be able to recommend new ideas for the organisation's visual design	3.1	Develop ideas for improving the organisation's approach to visual design				
		3.2	Create ideas for improving the visual design of the organisation				
		3.3	Assess whether own design ideas are relevant to the needs of the organisation				
		3.4	Present visual design recommendations to decision makers				

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
4	Be able to support staff putting the organisation's visual design policy into practice	4.1	Explain the organisation's visual design policy to staff in a way that attempts to encourage understanding and commitment			
		4.2	Provide opportunities for staff to ask questions			
		4.3	Perform checks to ensure that visual designs used in the organisation are consistent with the organisation's visual design policy			
		4.4	Report to own line manager any problems with implementing the visual design policy that are not within own authority to resolve			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(if sampled)

Unit 52: Design visual merchandising display layouts

Unit reference number: F/503/5706

QCF level: 3

Credit value: 10

Guided learning hours: 46

Unit summary

This unit assesses the occupational competence of visual merchandising specialists who are responsible for designing display layouts and providing guidance on how to assemble those designs.

Unit assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

Simulation is not allowed for any performance evidence in 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 candidate may have undertaken formal visual merchandising training that may contribute to the evidence for this unit.

People1st Retail's Assessment Principles for Retail Qualifications can be found on their website (www.people1st.co.uk).

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

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

Learning outcomes		Assessment criteria			Evidence type	Portfolio reference	Date
1	Understand the importance of display layout design in visual merchandising	1.1	Explain what layout design is				
		1.2	Explain the role of layout design in visual merchandising				
		1.3	Explain the importance of developing creative and practical display layout ideas in visual merchandising				
2	Understand the elements of creative layout design solutions	2.1	Explain how to choose and combine scale, shape, colour, texture and focal points to produce creative layout design solutions				
		2.2	Explain the role of dimension, shape, colour, texture and location in creative layout design				
3	Understand the importance of display layout designs to those who put layouts together	3.1	Explain why specifications, drawings and supporting information are needed by those who will put layouts together				

Learning outcomes		Assessment criteria			Evidence type	Portfolio reference	Date
4	Be able to develop creative ideas for display layouts	4.1	Assess which layout best meets the intended purpose of the display				
		4.2	Generate different ideas for the design of the display layout				
		4.3	Evaluate ideas for the design of the display layout, using relevant criteria including: <ul style="list-style-type: none"> • cost • the time available to prepare the display 				
		4.4	Select the display layout idea that is most likely to achieve the required visual effect within time and cost limits				
		4.5	Develop the chosen display layout idea in more detail ensuring that it: <ul style="list-style-type: none"> • fulfils the precise design requirements • is still achievable within the available time and cost • will fit the available space • can be assembled and used safely 				
		4.6	Reach an agreement with decision makers on the final layout				

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
5 Be able to produce guidance to enable the assembly of display layouts	5.1 Produce a drawing of the display layout that: <ul style="list-style-type: none"> uses visual merchandising drawing and coding conventions to give information specifies the dimensions and orientation of the layout specifies the standards of the finished layout 			
	5.2 Estimate the quantities of materials needed for specified display layouts			
	5.3 Estimate the costs of materials and services needed for specified layouts, doing so: <ul style="list-style-type: none"> within the design requirement for the layouts within cost limits 			
	5.4 Provide detailed information on the layout design to enable the display to be assembled safely			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(if sampled)

Unit 53: Follow point-of-sale procedures for age-restricted products in a retail environment

Unit reference number: J/503/5707

QCF 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.

Unit assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

Simulation is not allowed for any performance evidence in 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.

People1st Retail's Assessment Principles for Retail Qualifications can be found on their website (www.people1st.co.uk).

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

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

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 54: Provide National Lottery products to customers

Unit reference number: L/503/5708

QCF level: 2

Credit value: 4

Guided learning hours: 25

Unit summary

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

Unit assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

Simulation is not allowed for any performance evidence in 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.

People1st Retail's Assessment Principles for Retail Qualifications can be found on their website (www.people1st.co.uk).

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

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

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				

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
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 			
	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 55: Advise customers on the fixing and care of tiles

Unit reference number: R/503/5709

QCF 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.

Unit assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

Simulation is not allowed for any performance evidence in 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.

People1st Retail's Assessment Principles for Retail Qualifications can be found on their website (www.people1st.co.uk).

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

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Be able to establish customer requirements for fixing tiles	1.1 Ask customers questions to establish: <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 			
	1.2 Reach an agreement with customers concerning: <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	<p>Explain to customers how to fix tiles, including:</p> <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 56: Provide a counter and takeaway service

Unit reference number: L/601/5016

QCF 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 in 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.

Unit assessment requirements/evidence requirements

This unit should be assessed against People 1st's assessment strategy which can be found on People 1st's 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 to 1.5 by directly observing the learner's work.

There must be performance evidence, gathered through observing the learner's work for:

- at least **one** from **customers**
 - a. customers with routine needs
 - b. customers with non-routine needs

- at least **two** from **information**
 - a. items available
 - b. ingredients
 - c. prices, special offers and promotions

- at least **two** from **food and drink items**
 - a. hot food
 - b. cold food
 - c. hot drinks
 - d. cold drinks

- at least **two** from **condiments and accompaniments**
 - a. seasonings
 - b. sugars/sweeteners
 - c. prepared sauces/dressings.

Evidence for the remaining assessment criteria may be assessed through questioning or witness testimony.

Maintain counter and service areas

The assessor **must** assess assessment criteria 3.1 to 3.6 by directly observing the learner's work.

There must be performance evidence, gathered through observing the learner's work for:

- at least **three** from **service items**
 - a. service utensils
 - b. food containers/dispensers
 - c. trays
 - d. crockery
 - e. cutlery
 - f. disposable items

- at least **two** from **food and drink items**
 - a. hot food
 - b. cold food
 - c. hot drinks
 - d. cold drinks.

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

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

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

Learning outcomes		Assessment criteria			Evidence type	Portfolio reference	Date
3	Be able to maintain counter and service areas	3.1	Keep work area tidy, hygienic and free from rubbish and food debris during service				
		3.2	Maintain enough stock of clean service items				
		3.3	Restock with food and drink items when necessary				
		3.4	Display and store food and drink items in line as required				
		3.5	Clear work area of used and non-required service items at the appropriate times				
		3.6	Dispose of rubbish, used disposable items and food waste as required				
		4	Know how to maintain counter and service areas	4.1	Describe safe and hygienic working practices for clearing and why these are important		
4.2	State why food which is prepared first should be served first						
4.3	State why counter preparation areas and dining areas must be kept tidy and free from rubbish and food debris throughout the service						
4.4	State why waste must be handled and disposed of correctly						
4.5	State why a constant stock of service items should be maintained						
4.6	State why maintaining food at the correct temperature is important and how this can be ensured						
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 57: Help customers to choose alcoholic beverages in a retail environment

Unit reference number: J/503/5710

QCF level: 3

Credit value: 10

Guided learning hours: 53

Unit summary

This unit assesses the occupational competence of individuals who sell alcoholic beverages in a retail environment and apply in-depth knowledge of these products to help increase sales and encourage customer loyalty. The alcoholic beverages the learner sells may be of any kind.

Unit assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

Simulation is not allowed for any performance evidence in 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.

ACs 1.3, 3.1 and 4.7: 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.

AC 4.7: '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.

People1st Retail's Assessment Principles for Retail Qualifications can be found on their website (www.people1st.co.uk).

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

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

Learning outcomes		Assessment criteria			Evidence type	Portfolio reference	Date
1	Understand legislation relating to the sale of alcoholic beverages in a retail environment	1.1	Explain relevant legislation and regulations relating to the sale of alcoholic beverages in a retail environment				
		1.2	Explain the personal consequences and the consequences for the organisation of not complying with legislation and regulations relating to the sale of alcoholic beverages				
		1.3	Explain how the organisation's policy relating to the sale of alcohol complies with legal requirements				
2	Understand the characteristics of different alcoholic beverages	2.1	Explain the characteristics of different alcoholic beverages in terms of their features and benefits				
		2.2	Explain where to find reliable information about the alcoholic content of the alcoholic beverages the organisation carries				
3	Be able to comply with legal requirements when helping customers choose alcoholic beverages in a retail environment	3.1	Comply with all relevant legal requirements and organisational policy when helping customers choose alcoholic beverages in a retail environment				

Learning outcomes		Assessment criteria			Evidence type	Portfolio reference	Date
4	Be able to help customers to choose alcoholic beverages in a retail environment	4.1	Ask customers questions to establish the types of alcoholic beverage they are looking for				
		4.2	Provide customers with information about alcoholic beverages that is: <ul style="list-style-type: none"> • in line with organisational procedures • factually correct • legally compliant • relevant to the individual customer's needs 				
		4.3	Match the features and benefits of available alcoholic beverages as closely as possible to customer needs				
		4.4	Compare and contrast alcoholic beverages in ways that attempt to help customers to choose those products that best meet their needs				
		4.5	Respond to customer questions about alcoholic beverages in ways that attempt to encourage sales and promote goodwill				
		4.6	Recommend to customers related products that could enhance their experience of the alcoholic beverages they are interested in purchasing				
		4.7	Explain politely to customers why it is not possible to help them to purchase alcoholic beverages, when legal requirements or organisational policy prevent this				

Learner name: _____
Learner signature: _____
Assessor signature: _____
Internal verifier signature: _____
(if sampled)

Date: _____
Date: _____
Date: _____
Date: _____

Unit 58: Cash up in a retail environment

Unit reference number: L/503/5711

QCF 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.

Unit assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

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

People1st Retail's Assessment Principles for Retail Qualifications can be found on their website (www.people1st.co.uk).

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

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

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

Learner name: _____ Date: _____
Learner signature: _____ Date: _____
Assessor signature: _____ Date: _____
Internal verifier signature: _____ Date: _____
(if sampled)

Unit 59: Promote a retail store's credit card to customers in a retail environment

Unit reference number: R/503/5712

QCF 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.

Unit assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

Simulation is not allowed for any performance evidence in 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.

People1st Retail's Assessment Principles for Retail Qualifications can be found on their website (www.people1st.co.uk).

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

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

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	1.1	Explain how the store can benefit from having customers who hold the store's credit card				
		1.2	Explain how the store can benefit from enhancing the retail experience of existing holders of the store's credit card				
2	Be able to promote a retail store's credit card to customers in a retail environment	2.1	Ask potentially eligible customers if they have a credit card with the store				
		2.2	Promote the benefits of the retail store's credit card to: <ul style="list-style-type: none"> potential new customers existing card holders 				
		2.3	Comply with legal requirements to disclose to customers who express an interest in having the retail store's credit card: <ul style="list-style-type: none"> the costs involved the repayment terms the customer's right to cancel the card 				
		2.4	Address concerns customers may have about the retail store's credit card, ensuring that: <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 60: Provide service to customers in a dressing room in a retail environment

Unit reference number: Y/503/5713

QCF 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.

Unit assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

Simulation is not allowed for any performance evidence in 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.

People1st Retail's Assessment Principles for Retail Qualifications can be found on their website (www.people1st.co.uk).

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

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

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	1.1	Explain how to recognise customers on the sales floor who may be interested in trying on clothes				
		1.2	Welcome customers politely when they approach the dressing room				
		1.3	Tell customers how to get further help before leaving them to try on clothes				
		1.4	Monitor the dressing room to ensure that customers are not kept waiting unduly to try on clothes				
		1.5	Suggest to dressing room customers any matching items, accessories or promotional offers that may be of interest to them				
2	Be able to take measures to minimise stock loss while serving customers in a dressing room in a retail environment	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				
		2.2	Control the number of items of stock taken into the dressing room in ways that attempt to maintain goodwill				
		2.3	Perform checks to ensure that customers bring out of the dressing room all the items that were taken in				
		2.4	Follow organisational procedures for reporting suspected or actual loss of stock from the dressing room				

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 61: Promote food or drink products by offering samples to customers

Unit reference number: D/503/5714

QCF 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.

Unit assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

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

People1st Retail's Assessment Principles for Retail Qualifications can be found on their website (www.people1st.co.uk).

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

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

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

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

Unit reference number: H/503/5715

QCF 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.

Unit assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

Simulation is not allowed for any performance evidence in 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.

People1st Retail's Assessment Principles for Retail Qualifications can be found on their website (www.people1st.co.uk).

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

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

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

Learning outcomes		Assessment criteria			Evidence type	Portfolio reference	Date
3	Be able to convey goods from a retail environment to customers' delivery addresses	3.1	Drive from a retail environment to customers' delivery addresses: <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 				
		3.2	Contact customers to make alternative arrangements when deliveries cannot be made at the times agreed with customers				
		3.3	Unload goods at customers' delivery addresses: <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	4.1	Deliver goods to customers in a polite manner				
		4.2	Leave deliveries only with individuals who can legally receive them				
		4.3	Follow organisational procedures for dealing with goods that cannot be delivered				
		4.4	Update records of delivery and non-delivery in line with organisational procedures				

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(if sampled)

Unit 63: Contribute to monitoring and maintaining ease of shopping in a retail sales area

Unit reference number: K/503/5716

QCF 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.

This unit requires workplace assessment of occupational competence.

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

People1st Retail's Assessment Principles for Retail Qualifications can be found on their website (www.people1st.co.uk).

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

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

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 64

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

Unit reference number: M/503/5717

QCF 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.

Unit assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

Simulation is not allowed for any performance evidence in 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.

People1st Retail's Assessment Principles for Retail Qualifications can be found on their website (www.people1st.co.uk).

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

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

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	1.1	Explain the difference between informing and advising customers about insurance products				
		1.2	Explain why it is not within own limits of authority to provide advice to customers about insurance products				
		1.3	Explain the legal requirements for offering customers the opportunity to read the insurance policy summary				
2	Understand the importance of helping customers to understand the implications of applying for a retail store's credit card and associated insurance products	2.1	Explain how customers can benefit from reading the policy summary for an insurance product associated with the retail store's credit card				
		2.2	Explain why customers may take credit card and insurance application forms away to study in detail				
		2.3	Explain why blank application forms must be voided before being given to the customer to take away				

Learning outcomes		Assessment criteria			Evidence type	Portfolio reference	Date
3	Understand the legal requirements relating to helping customers to apply for the store's credit card and associated insurance products	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				
		3.2	Explain why customers must provide proof of identity when applying for the store's credit card and associated insurance products				
		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				

Learning outcomes	Assessment criteria		Evidence type	Portfolio reference	Date
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			
	4.5	Perform checks to ensure that customers are eligible for the insurance they wish to apply for			
	4.6	Inform customers who ask for advice about an insurance product: <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 			
	4.7	Ask customers questions to ensure that they understand information about the insurance product they have applied for			

Learning outcomes		Assessment criteria			Evidence type	Portfolio reference	Date
5	Be able to help customers to apply for a retail store's credit card and associated insurance products	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				
		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				
		5.3	Perform checks to ensure that the customer's identity has been proved				
		5.4	Follow organisational requirements to keep customer's personal data secure throughout the application process				
		5.5	Process applications in line with the procedures agreed between the store and the insurer				
		5.6	Tell customers whose applications have been accepted: <ul style="list-style-type: none"> • their credit limit • the Annual Percentage Rate (APR) that applies 				
		5.7	Follow organisational procedures to enable customer accounts to be set up				
		5.8	Tell customers whose applications have not been accepted: <ul style="list-style-type: none"> • in line with organisational procedures • without speculating with the customer on the reasons for the refusal 				
		5.9	Follow organisational procedures when technical problems arise with the application system or equipment				

Learner name: _____ Date: _____
Learner signature: _____ Date: _____
Assessor signature: _____ Date: _____
Internal verifier signature: _____ Date: _____
(if sampled)

Unit 65: Help customers to choose delicatessen products in a retail environment

Unit reference number: T/503/5718

QCF 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.

Unit assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

Simulation is not allowed for any performance evidence in 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.

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.

People1st Retail's Assessment Principles for Retail Qualifications can be found on their website (www.people1st.co.uk).

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

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

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

Unit reference number: A/503/5719

QCF 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.

Unit assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

Simulation is not allowed for any performance evidence in 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.

People1st Retail's Assessment Principles for Retail Qualifications can be found on their website (www.people1st.co.uk).

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

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Be able to cut and weigh delicatessen products to meet customer requirements	1.1	Explain the importance of using tools and utensils suited to the delicatessen products			
		1.2	Cut delicatessen products in ways that: <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 			
		1.3	Weigh delicatessen products accurately, taking into account the weight of any additional items on the scales such as containers			
	2	Be able to wrap or package portioned delicatessen products for customers	2.1	Ask customers if they are satisfied with portioned products before wrapping or packaging them		
2.2			Wrap or package portioned products using materials or containers suited to the product			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Be able to maintain the display of a delicatessen counter	3.1	Restore products from which portions have been taken to a presentable condition			
		3.2	Remove from display products from which portions have been taken when the product is no longer saleable			
		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: _____ Date: _____
(if sampled)

Unit 67: Merchandise plants and other relevant products

Unit reference number: J/502/0771

QCF 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 in the Retail Skills qualifications for learners who work in garden centres.

Unit assessment requirements/evidence requirements

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.

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

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

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 (e.g. 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 e.g. root wrap and containers				
		1.4	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	Be able to merchandise plants and other products	2.1	Display plants and relevant products (e.g. 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	<p>Explain how to check and maintain the condition of plants and products covering the following types of plants:</p> <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 68: Help customers to choose specialist products in a retail environment

Unit reference number: M/503/5720

QCF level: 3

Credit value: 8

Guided learning hours: 34

Unit summary

This unit assesses the occupational competence of individuals responsible for giving customers expert advice on specialist products. Specialist products are ones for which many customers will welcome in-depth advice to help them choose the products that best meet their needs.

Unit assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

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

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

AC 2.9: 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.

People1st Retail's Assessment Principles for Retail Qualifications can be found on their website (www.people1st.co.uk).

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

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

Learning outcomes		Assessment criteria			Evidence type	Portfolio reference	Date
1	Understand commercial awareness in relation to the organisation, its target market and product offer	1.1	Explain own organisation's brand values in relation to its product offer, pricing and service				
		1.2	Explain the customer profiles for own organisation				
		1.3	Explain how own organisation compares with its competitors on product offer, pricing and service				
		1.4	Explain the elements of a positive customer experience in relation to: <ul style="list-style-type: none"> • own organisation • specialist products within own area of responsibility 				

Learning outcomes		Assessment criteria			Evidence type	Portfolio reference	Date
2	Understand the specialist products within own area of responsibility	2.1	Explain the meaning of specialist terminology that knowledgeable customers are likely to use in relation to the specialist products within own area of responsibility				
		2.2	Explain how the specialist products within own area of responsibility are produced or obtained				
		2.3	Explain how methods of producing or obtaining specialist products in own area affect the nature and quality of the products				
		2.4	Explain any legislation relating to the specialist products within own area of responsibility				
		2.5	Explain any health and safety considerations that customers must be warned about, or may ask about, in relation to the specialist products within own area of responsibility				
		2.6	Explain any ethical and environmental concerns that customers may have about the specialist products within own area of responsibility				
		2.7	Explain how to address ethical and environmental concerns customers may have about specialist products within own area of responsibility				
		2.8	Explain sources of after-sales advice and support that are available to customers in relation to the specialist products within own area of responsibility				
		2.9	Explain the customer's legal rights and the organisation's policy concerning returns in relation to the specialist products within own area of responsibility				

Learning outcomes		Assessment criteria			Evidence type	Portfolio reference	Date
3	Be able to initiate and develop a rapport with customers	3.1	Explain how to assess customers' body language to determine whether they are likely to respond positively to being approached				
		3.2	Adapt own speech and body language in ways that attempt to initiate and develop a rapport with individual customers				
		3.3	Interact with customers in ways that attempt to support the organisation's brand values				
4	Be able to match specialist products to individual customer requirements	4.1	Explore customers' individual requirements to establish what specialist products they are looking for				
		4.2	Provide customers with information about specialist products that is: <ul style="list-style-type: none"> • in line with organisational procedures • factually correct • legally compliant • relevant to the individual customer's needs 				
		4.3	Match the features and benefits of available specialist products as closely as possible to customers' needs				
		4.4	Compare and contrast specialist products in ways that attempt to help customers to choose products that best meet their needs				
		4.5	Respond to customers' questions about specialist products in ways that attempt to encourage sales and promote goodwill				
		4.6	Recommend related products to customers that could enhance their experience of the specialist product they are purchasing				

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
5	Be able to maintain own product knowledge and expertise in relation to specialist products	5.1	Explain how in-depth product knowledge combined with genuine enthusiasm for the product affect own ability to sell specialist products			
		5.2	Investigate new products and product trends in own area of expertise			
		5.3	Devise ways of maintaining own enthusiasm for the products in own area of expertise			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(if sampled)

Unit 69: Demonstrate make-up and skincare products to customers at a beauty counter in a retail environment

Unit reference number: T/503/5721

QCF 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 make-up or skincare products to customers for the purpose of demonstrating, promoting and selling them.

Unit assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

Simulation is not allowed for any performance evidence in 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 evidence should take into account the training provided by the cosmetic house that the candidate is working for where this occurs.

People1st Retail's Assessment Principles for Retail Qualifications can be found on their website (www.people1st.co.uk).

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

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

Learning outcomes		Assessment criteria			Evidence type	Portfolio reference	Date
1	Understand the commercial value of demonstrating make-up and skincare products	1.1	Explain the purpose and value of demonstrations in promoting and selling make-up and skincare products				
		2	Understand the elements of a demonstration of make-up 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 make-up and skincare products				
		2.5	Explain the importance of organising demonstrations of make-up and skincare products into a series of logical steps				
		2.6	Explain the importance of clearing away products and equipment after demonstrating make-up and skincare products				

Learning outcomes		Assessment criteria			Evidence type	Portfolio reference	Date
3	Be able to prepare to demonstrate make-up 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 to 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 make-up or skincare products to customers as part of a demonstration	4.1	Apply make-up 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 				
		4.2	Describe to customers the make-up or skincare products being demonstrated, focusing on the product features and benefits				

Learning outcomes	Assessment criteria		Evidence type	Portfolio reference	Date
5 Be able to conclude a demonstration of make-up or skincare products	5.1	Ask customers questions to determine whether they are satisfied with the results of the make-up 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 make-up 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 70: Operate a customer record card system on a beauty counter in a retail environment

Unit reference number: A/503/5722

QCF 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.

Unit assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

Simulation is not allowed for any performance evidence in 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.

People1st Retail's Assessment Principles for Retail Qualifications can be found on their website (www.people1st.co.uk).

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

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

Learning outcomes		Assessment criteria			Evidence type	Portfolio reference	Date
1	Understand how to maintain the customer record card system in a retail environment	1.1	Explain how using a customer record card system can help to meet own sales targets				
		1.2	Explain the benefits to the customer of the record card system				
		1.3	Explain the importance of updating the record card system regularly				
		1.4	Explain how to find time in own working day to update the record card system				
		1.5	Explain the relevant aspects of current data protection legislation when maintaining a customer record card system				
		1.6	Explain the implications of complying with data protection legislation when maintaining a customer record card system				
		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				

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
2 Be able to set up record cards for customers at a beauty counter in a retail environment	2.1 Ask customers whether a record card may be set up for them at the beauty counter			
	2.2 Describe to customers the benefits of being on file at the beauty counter			
	2.3 Offer customers the opportunity to make an appointment for a return visit to the beauty counter, when setting up a record card			
	2.4 Complete record cards with customer details, ensuring that the information: <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 			
3 Be able to use the record card system to recognise opportunities for increasing sales at a beauty counter in a retail environment	3.1 Update the information in the record card system regularly enough to maintain the system's usefulness as a sales tool			
	3.2 Identify the counter's highest spending customers, from the record card system, to receive priority information about special offers and promotions			

Learner name: _____ Date: _____
Learner signature: _____ Date: _____
Assessor signature: _____ Date: _____
Internal verifier signature: _____ Date: _____
(if sampled)

Unit 71: Give customers a positive impression of yourself and your organisation

Unit reference number: L/601/0933

QCF 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.

Unit assessment requirements/evidence requirements

Assessment guidance for this unit is given 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 in 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.
- 5 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.

- 6 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.
- 7 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.

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

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

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

Unit reference number: Y/503/5727

QCF 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.

Unit 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.

People1st Retail's Assessment Principles for Retail Qualifications can be found on their website (www.people1st.co.uk).

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

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

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

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 73: Reduce security risks in a retail environment

Unit reference number: D/503/5728

QCF 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.

Unit 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.

People1st Retail's Assessment Principles for Retail Qualifications can be found on their website (www.people1st.co.uk).

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

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

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 74: Deputise for the leader of a retail team

Unit reference number: Y/503/5730

QCF level: 3

Credit value: 11

Guided learning hours: 55

Unit summary

This unit assesses the occupational competence of individuals who deputise for a team leader in a retail environment. The competent individual is expected to be able to manage and motivate peer colleagues to carry out their day-to-day duties.

Unit assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

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

People1st Retail's Assessment Principles for Retail Qualifications can be found on their website (www.people1st.co.uk).

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

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Understand the standards of performance required of own retail team when deputising for a team leader	1.1 Explain team leader responsibilities in relation to: <ul style="list-style-type: none"> • health and safety • equality, diversity and inclusion • security • staffing levels • absence reporting • timekeeping • personal appearance • handling customer complaints 			
	1.2 Explain relevant legislation and regulations relating to the products the team sells			
	1.3 Explain the importance of setting an example to team members by following organisational procedures and policies at all times			
	2.1 Explain the challenges involved in temporarily managing peer colleagues			
2 Understand how to gain the co-operation of own retail team when deputising for team leader	2.2 Explain how clear communication helps teams to work effectively			
	2.3 Explain why it is important for a team leader to be approachable and trustworthy, including the importance of maintaining confidentiality			
	2.4 Explain the importance of treating all team members fairly			

Learning outcomes		Assessment criteria			Evidence type	Portfolio reference	Date
3	Be able to maintain the standards of performance of own retail team when deputising for a team leader	3.1	Communicate accurate information and instructions to the team				
		3.2	Set an example for own team by following organisational procedures and policies when deputising for a team leader				
		3.3	Perform checks to ensure that team members follow organisational procedures and policies				
4	Be able to manage the morale of own retail team when deputising for a team leader	4.1	Allocate work tasks to team members in ways that attempt to maintain the morale of the team				
		4.2	Use methods to motivate own team that are suited to individual team members' existing levels of motivation and expertise				
		4.3	Praise good performance both to the individuals concerned and to management				
		4.4	Provide support to team members who are having difficulty coping with their work, in ways suited to the individual and the situation				
		4.5	Communicate potentially sensitive information only to those who have a right to receive it				

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
5	Be able to manage own performance when deputising for a team leader	5.1	Manage own time to carry out other work duties when deputising for a team leader			
		5.2	Follow organisational procedures when problems arise when deputising for a team leader			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(if sampled)

Unit 75: **Contribute to the continuous improvement of retail operations within own area of responsibility**

Unit reference number: D/503/5731

QCF level: 3

Credit value: 10

Guided learning hours: 47

Unit summary

This unit assesses the occupational competence of a first line manager or senior team member in relation to the contribution they make to improving operations in their own area of responsibility. The learner could contribute to improving performance against any operational measure set by the organisation, such as sales targets, service standards or quality standards.

Unit assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

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

It is highly unlikely that the assessor will be able to gather evidence for this unit by observing workplace activity. Evidence can, however, come from professional discussion supported by oral reports of real achievements and testimony from an expert witness.

AC 4.2: 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.

People1st Retail's Assessment Principles for Retail Qualifications can be found on their website (www.people1st.co.uk).

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

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

Learning outcomes		Assessment criteria			Evidence type	Portfolio reference	Date
1	Understand how own area of responsibility can contribute to the overall success of the retail organisation	1.1	Explain characteristics of the organisation's brand image, customer base and desired market position				
		1.2	Explain the relationship between the agreed performance measures for own area of responsibility and the organisation's brand image and desired market position				
		1.3	Explain how systems and procedures in own area of responsibility are intended to support the achievement of organisational performance measures				
		1.4	Explain potential causes of failure to achieve organisational performance measures in the type of retail operations carried out in own area of responsibility				
2	Understand how to motivate staff in own area of responsibility to support and contribute to the continuous improvement of retail operations	2.1	Explain why it is important for staff to understand the purpose and intended benefits of improvements to retail operations				
		2.2	Explain how own manner when explaining improvements can affect staff's response to these				
		2.3	Explain the importance of encouraging staff to suggest ideas for improvement to retail operations				
		2.4	Explain the importance of ensuring that colleagues receive the credit if their ideas are implemented				
		2.5	Explain the importance of showing enthusiasm and leading by example when putting improvements into practice				

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
3	Be able to evaluate achievements of organisational performance measures for retail operations within own area of responsibility	Evaluate organisational performance within own area of responsibility using information that is: <ul style="list-style-type: none"> • relevant • reliable • up to date 		
	3.1			
4	Be able to develop recommendations for improving the effectiveness of retail operations	Develop ideas to improve the effectiveness of operations in own area of responsibility		
	4.1			
		Evaluate which ideas for improvements to the effectiveness of operations in own area of responsibility should be put forward to decision makers, based on the extent to which the ideas are: <ul style="list-style-type: none"> • consistent with the organisation's brand image • consistent with organisational policy • achievable, given the available resources • beneficial to the organisation and its customers 		
		4.2		

Learning outcomes		Assessment criteria			Evidence type	Portfolio reference	Date
5	Be able to recommend ideas for improving the effectiveness of retail operations to decision makers	5.1	Present ideas to decision makers for possible improvements, doing so: <ul style="list-style-type: none"> with supporting facts acknowledging any contributions made by other people 				
		5.2	Explain to decision makers the benefits the recommended improvements could bring				
		5.3	Justify to decision makers the resources needed to put improvements into practice				
		5.4	Clarify any aspects of the recommended improvements decision makers wish to discuss further				

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
6	Be able to contribute to the implementation of planned improvements to retail operations within own area of responsibility	6.1	<p>Explain planned improvements to staff in ways that attempt to:</p> <ul style="list-style-type: none"> • make clear the benefits of the proposed changes • encourage involvement in implementing proposed changes 			
		6.2	Ensure that staff have everything they need to implement proposed changes including additional training			
		6.3	Seek advice and support to resolve any problems with implementing proposed changes that are not within own authority to resolve			
		6.4	Demonstrate to staff own commitment to achieving the benefits of proposed changes through own behaviour			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(if sampled)

Unit 76: Manage the prevention of wastage and loss in a retail environment

Unit reference number: H/503/5732

QCF level: 3

Credit value: 11

Guided learning hours: 50

Unit summary

This unit assesses the occupational competence of individuals who are responsible for preventing wastage and loss in their work area, both by their own actions and by promoting security consciousness to colleagues.

For the purposes of this unit, 'loss' means the loss of stock, equipment, cash and cash equivalents through theft or fraud. 'Wastage' means the loss of stock through deterioration or damage.

Unit assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

It is expected that simulation will be used to gather evidence of security measures being implemented to deal with or contain:

- security risks
- threats to security
- breaches of security
- actual or suspected incidents of theft.

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.

People1st Retail's Assessment Principles for Retail Qualifications can be found on their website (www.people1st.co.uk).

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

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand the purpose of loss-control and stock-taking systems	1.1	Explain the purpose of loss-control and stock-taking systems			
		2	Be able to monitor own work area security in a retail environment	2.1 Monitor the work area to detect any problems with security 2.2 Implement security measures in line with: <ul style="list-style-type: none"> • legislation • organisational requirements 		
3	Be able to promote security consciousness to colleagues	3.1	Provide information to colleagues on: <ul style="list-style-type: none"> • responsibilities for maintaining security • maintenance of security in own work area when opening, operating and closing the retail unit • those with authority to stop and search staff and customers • the items most likely to be stolen from own work area 			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
4	Be able to investigate loss of stock, equipment, cash and cash equivalents	4.1	Monitor levels of stock, equipment, cash and cash equivalents in line with organisational procedures to enable loss to be detected			
		4.2	Record losses in line with organisational procedures			
		4.3	Follow organisational procedures to investigate the cause of losses			
5	Be able to take measures to prevent wastage and loss	5.1	Provide information to colleagues on: <ul style="list-style-type: none"> the nature and extent of wastage and loss how wastage and loss can occur the problems caused by wastage and loss how they can help to prevent wastage and loss 			
		5.2	Evaluate potential methods for preventing wastage and loss			
		5.3	Implement methods to prevent wastage and loss			
		5.4	Evaluate the effectiveness of wastage and loss prevention measures			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(if sampled)

Unit 77: Produce staffing schedules to help a retail team to achieve its targets

Unit reference number: K/503/5733

QCF level: 3

Credit value: 5

Guided learning hours: 22

Unit summary

This unit assesses the occupational competence of team leaders and other senior team members who are responsible for ensuring that there is adequate cover in their team to ensure that targets will be met. This includes producing staffing schedules, adjusting schedules as needed.

Unit assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

Simulation is not allowed for any performance evidence in 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.

AC 2.1: 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.

People1st Retail's Assessment Principles for Retail Qualifications can be found on their website (www.people1st.co.uk).

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

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

Learning outcomes		Assessment criteria			Evidence type	Portfolio reference	Date
1	Understand the uses of and constraints upon the staffing schedules for a retail team	1.1	Explain the relationship between staffing schedules and the achievement of work targets within a retail team				
		1.2	Explain the factors other than staffing that may affect progress towards work targets, and the effect these are likely to have				
		1.3	Explain what can happen if requirements are not complied with when drawing up staffing schedules including: <ul style="list-style-type: none"> • legal requirements • organisational requirements • contracts of employment 				

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
2	<p>Be able to produce staffing schedules for a retail team</p> <p>2.1</p> <p>Produce staffing schedules that:</p> <ul style="list-style-type: none"> cover all the operational needs that the team is responsible for meeting take account of the operational constraints that apply take account of the existing skills of staff show how work will be allocated between available staff show the locations where individuals will work show the times when individuals will start and finish work comply with relevant laws, organisational policy relating to working hours and individual contracts of employment attempt to make it easy for team members to understand and use include contingency plans to cope with unusual situations 			
3	3.1	Monitor the progress of the team towards meeting operational needs		
	3.2	Adjust staffing schedules where necessary and possible to ensure that operational needs can be met		

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(if sampled)

Unit 78: Monitor and maintain health and safety in a retail environment

Unit reference number: M/503/5734

QCF level: 3

Credit value: 13

Guided learning hours: 60

Unit summary

This unit assesses occupational competence in relation to monitoring the workplace for health and safety risks and taking action to reduce those risks, including carrying out formal risk assessments.

Unit 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 implementation of accident and emergency procedures. Evidence of competence in implementing 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.

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.

People1st Retail's Assessment Principles for Retail Qualifications can be found on their website (www.people1st.co.uk).

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

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Understand own role in controlling risks to health and safety in a retail environment	1.1 Explain own rights and responsibilities under current legislation relating to: <ul style="list-style-type: none"> • health and safety at work • managing health and safety at work • reporting injuries, diseases and dangerous occurrences • substances that can endanger health • first aid • fire precautions 			
	1.2 Describe sources of information and advice about health and safety legislation, policy and procedures			
	1.3 Explain how to control health and safety hazards in relation to own role			
	1.4 Describe methods of containing threatening and/or violent behaviour			
	1.5 Explain how to control threatening and/or violent behaviour			

Learning outcomes		Assessment criteria			Evidence type	Portfolio reference	Date
2	Understand own responsibility for implementing accident and emergency procedures in a retail environment	2.1	Explain how people can react in the event of accidents and emergencies				
		2.2	Explain the importance of staying calm in the event of an accident or emergency				
		2.3	Describe organisational procedures for raising alarms				
		2.4	Explain own responsibilities in relation to evacuating the workplace in the event of an accident or emergency				
		2.5	Describe some escape routes from own work place including how to reach and use them safely				
3	Be able to control risks to health and safety in a retail environment	3.1	Monitor own working area to ensure that: <ul style="list-style-type: none"> it is free from risks to health and safety colleagues are using any personal protective equipment in line with organisational procedures 				
		3.2	Seek advice immediately from the designated person when having difficulty controlling a risk to health and safety				
		3.3	Provide training to colleagues on safe working practices				
		3.4	Implement health and safety checks in line with organisational procedures				

Learning outcomes		Assessment criteria			Evidence type	Portfolio reference	Date
4	Be able to conduct risk assessments in a retail environment	4.1	Explain why risk assessments are necessary in a retail environment				
		4.2	Conduct risk assessments in such a way as to detect any significant risks to health and safety				
		4.3	Prioritise risks in the order they should be dealt with				
		4.4	Record risk assessments in line with organisational procedures				
		4.5	Make risk assessment records available to those who need them				
		4.6	Review risk assessment procedures to take account of changes in factors affecting health and safety				
		4.7	Update risk assessment procedures as needed				

Learning outcomes	Assessment criteria			Evidence type	Portfolio reference	Date
5 Be able to implement accident and emergency procedures in a retail environment	5.1	Take action in line with organisational procedures to prevent injury when emergencies occur in the workplace				
	5.2	Take action in line with organisational procedures to prevent damage to property when emergencies occur in the workplace				
	5.3	Take action in line with organisational procedures to contain potentially unsafe situations in the work area				
	5.4	Seek immediate help from an appropriate source in the event of accidents and emergencies				
	5.5	Use safety equipment in the event of an accident or emergency in line with the organisation's and/or manufacturer's guidelines				
	5.6	Ensure when the building is being evacuated that: <ul style="list-style-type: none"> • colleagues and customers leave the building immediately • colleagues and customers use designated escape routes to leave the building • officials responding to requests for help are given access 				
	5.7	Act immediately to isolate anyone acting violently or making threats				
	5.8	Take action to protect colleagues and customers from anyone acting violently or making threats				

Learner name: _____ Date: _____
Learner signature: _____ Date: _____
Assessor signature: _____ Date: _____
Internal verifier signature: _____ Date: _____
(if sampled)

Unit 79: Work effectively in a retail team

Unit reference number: T/503/5735

QCF level: 2

Credit value: 8

Guided learning hours: 37

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 seek feedback about their own work performance.

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

Unit assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

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

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 2.4: '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.

AC 2.4: 'Constructive' means objective (i.e. not personal), designed to help, and conveyed in a respectful manner.

People1st Retail's Assessment Principles for Retail Qualifications can be found on their website (www.people1st.co.uk).

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

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand how to recognise discrimination, bullying and harassment in own workplace	1.1	Explain how legislation and own employer define discrimination, bullying and harassment			
		1.2	Explain own employer's procedures for dealing with discrimination, bullying and harassment			
2	Be able to work effectively in a retail team	2.1	Ask for help and information from colleagues when needed			
		2.2	Respond to colleagues' requests for help and information: <ul style="list-style-type: none"> • when own workload allows • within the limits of own responsibility • in ways that attempt to maintain working relationships 			
		2.3	Offer help to colleagues when own workload allows and within the limits of own responsibility			
		2.4	Explain how to resolve difficulties with colleagues in a polite and constructive way			
		2.5	Identify the people who can provide advice if problems in working with colleagues cannot be resolved without help			
		2.6	Follow organisational procedures for safeguarding own and others' health and safety while at work			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Be able to improve own work performance in a retail team	3.1	Explain the importance of being an effective learner at work			
		3.2	Identify training needs to improve own work performance			
		3.3	Agree own training programme, including action points and deadlines			
		3.4	Explain the importance of asking for feedback on own work performance			
		3.5	Request feedback on own work performance, including what is going well and what needs improving			
		3.6	Evaluate own work performance against agreed training programme			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(if sampled)

Unit 80: Prepare newspapers and magazines for return to merchandisers

Unit reference number: A/503/5736

QCF 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.

Unit assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

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

People1st Retail's Assessment Principles for Retail Qualifications can be found on their website (www.people1st.co.uk).

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

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

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		
3 Be able to prepare batches of 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		
	3.1	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 		

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
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 81: Monitor and support secure payment point use during trading hours

Unit reference number: F/503/5737

QCF level: 3

Credit value: 3

Guided learning hours: 13

Unit summary

This unit assesses the occupational competence of individuals who are responsible for maintaining the secure use of single or multiple payment points during trading hours.

Unit assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

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

People1st Retail's Assessment Principles for Retail Qualifications can be found on their website (www.people1st.co.uk).

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

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

Learning outcomes		Assessment criteria			Evidence type	Portfolio reference	Date
1	Understand the data security risks associated with payment point use	1.1	Explain who is authorised to remove cash or cash equivalents from payment points during trading hours				
		1.2	Explain the data security risks that can arise at a payment point				
2	Be able to monitor and support secure payment point use during trading hours	2.1	Monitor the payment point during trading hours to ensure that staff are following organisational procedures for keeping customers' personal data confidential				
		2.2	Authorise payment point transactions and adjustments in line with organisational procedures for: <ul style="list-style-type: none"> • customer service • security • stock control 				
		2.3	Replenish change in payment points in line with organisational procedures				

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(if sampled)

Unit 82: Check the accuracy of records of hours worked by staff in a retail environment

Unit reference number: J/503/5738

QCF 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.

Unit assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

Simulation is not allowed for any performance evidence in 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.

People1st Retail's Assessment Principles for Retail Qualifications can be found on their website (www.people1st.co.uk).

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

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

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	1.1	Explain the importance of keeping accurate records of the number of hours worked by staff in a retail environment				
		1.2	Explain types of discrepancies that can arise in the records of hours worked by staff				
		1.3	Explain possible consequences of not identifying discrepancies in the records of hours worked by staff				
		1.4	Explain the importance of identifying and reporting recurring inaccuracies in information about the number of hours worked by staff				
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	2.1	Explain what it means to treat colleagues as 'internal customers'				
		2.2	Explain the importance of treating colleagues as internal customers				
		2.3	Explain what is meant by 'personal data' in relation to records of the number of hours worked by staff				
		2.4	Explain the importance of keeping personal data confidential in relation to records of the number of hours worked by staff				

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	Perform checks to ensure that all the information needed to confirm the number of hours worked by staff has been provided				
		3.2	Identify actual and/or potential discrepancies in information about the number of hours worked by staff				
		3.3	Follow organisational procedures to query actual and/or potential discrepancies in information about the number of hours worked by staff				
		3.4	Follow organisational procedures to report recurring inaccuracies in information about the number of hours worked by staff				
		3.5	Calculate accurately the total hours worked by staff				
		3.6	Use data processing equipment and materials in line with organisational procedures				

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
4	Be able to provide information about the number of hours worked by staff in a retail environment	4.1	Produce information and reports on the number of hours worked by staff in line with organisational procedures			
		4.2	Provide information and advice in response to queries from colleagues about their own recorded hours of work, doing so: <ul style="list-style-type: none"> • accurately • politely 			
		4.3	Refer queries from colleagues to the designated person, where these are not within own authority to resolve			
		4.4	Disclose personal data about colleagues only to those who have a right to see it			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(if sampled)

Unit 83: Maintain data confidentiality and security when using web-based retail facilities in store

Unit reference number: D/505/9382

QCF level: 2

Credit value: 2

Guided learning hours: 11

Unit summary

This unit assesses the occupational competence of individuals who work use web-based facilities to record and retain customer data.

Unit assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

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

People1st Retail's Assessment Principles for Retail Qualifications can be found on their website (www.people1st.co.uk).

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

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

Learning outcomes		Assessment criteria			Evidence type	Portfolio reference	Date
1	Be able to maintain the confidentiality and security of data regarding customers when recording and retaining online data	1.1	Make sure that documents, computers or electronic equipment containing sensitive information are kept secure				
		1.2	Check that online information is not changed in any unauthorised way, in line with organisational procedures				
		1.3	Encrypt all data entered electronically, where required				
		1.4	Make a record of only that information that needs to be recorded, according to organisational requirements				
		1.5	Keep all records of confidential information away from public display				
		1.6	Protect confidentiality by checking that information is destroyed properly when it is no longer required				
		1.7	Seek guidance from the relevant person about maintaining the security of data, when required				
		1.8	Maintain organisational requirements relating to the confidentiality and security of data				

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	Be able to maintain the confidentiality and security of data held online when sharing information with third parties in line with organisational requirements	2.1	Check that any parties seeking information have the authority to receive it, following organisational procedures			
		2.2	Provide information to third parties only where they have satisfied relevant security checks, in line with organisational procedures			
		2.3	Provide relevant information only to those who need to use the information			
		2.4	Check with the relevant person that the learner has the authority to release information to others, where necessary			
		2.5	Use secure methods of sending information to third parties, when required, in line with organisational procedures			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(if sampled)

Unit 84: Using web-based facilities in-store to achieve retail sales

Unit reference number: D/505/9379

QCF level: 2

Credit value: 2

Guided learning hours: 20

Unit summary

This unit assesses the occupational competence of individuals who use and promote their stores web-based retail facilities.

Unit assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

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

People1st Retail's Assessment Principles for Retail Qualifications can be found on their website (www.people1st.co.uk).

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

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

Learning outcomes		Assessment criteria			Evidence type	Portfolio reference	Date
1	Be able to operate their own organisation's web-based in-store retail selling facilities in support of their customers' retail experience	1.1	Operate all aspects of the organisation's relevant web-based facilities correctly and with confidence				
		1.2	Use web-based facilities for the benefit of customers, based upon identified customer needs				
		1.3	Be proactive in checking online the availability of stock sought by customers				
		1.4	Place orders online on behalf of customers, where relevant				
		1.5	Process customer payments using web-based facilities, where relevant, applying appropriate discounts, in line with organisational requirements				
		1.6	Explain their responsibilities for monitoring and maintaining good housekeeping in relation to the web-based retail facilities in-store				
		1.7	Make sure that the selling of products within their area of operations complies with relevant legislation and regulatory requirements				
		1.8	Make sure that web-based facilities in-store fulfil relevant housekeeping requirements				
		1.9	Report any faults with web-based facilities in-store promptly to the relevant person				

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	Be able to promote customers' use of web-based in-store retail selling facilities	2.1	Explain the need to be sensitive to customers' attitudes to web-based technology, including how to respond to customers accordingly			
		2.2	Make customers aware of the availability and scope of their own organisation's web-based facilities			
		2.3	Communicate the features and benefits of web-based facilities enthusiastically and with confidence			
		2.4	Respond to customer needs from, and interest in, web-based facilities			
		2.5	Involve customers in the use of web-based processes where appropriate			
		2.6	Refer any problems whilst customers are using the web-based facilities in-store to the appropriate person, where necessary			
		2.7	Seek customer feedback regarding use of their own organisation's web-based facilities in-store			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(if sampled)

Unit 85: Advising and supporting customers on the use of in-store web-based retail facilities

Unit reference number: R/505/9380

QCF level: 2

Credit value: 3

Guided learning hours: 24

Unit summary

This unit assesses the occupational competence of individuals who are selling, promoting and advising customers on how to use in-store web-based retail facilities.

Unit assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

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

People1st Retail's Assessment Principles for Retail Qualifications can be found on their website (www.people1st.co.uk).

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

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

Learning outcomes		Assessment criteria			Evidence type	Portfolio reference	Date
1	Understand factors to consider when advising and supporting customers on the use of in-store web-based retail facilities	1.1	Explain the importance of achieving a balance between demonstration, instruction and customers' own activity in operating the facilities, as appropriate to customers' levels of expertise, attitude and confidence in using web-based technology				
		1.2	Explain their own organisation's practices and requirements relating to advising and supporting customers on the use of the web-based facilities				
2	Be able to address customers' requirements via in-store web-based retail selling facilities	2.1	Operate all aspects of their own organisation's web-based facilities correctly and with confidence				
		2.2	Determine customers' requirements in accessing web-based facilities				
		2.3	Assess customers' levels of understanding regarding how to use the web-based facilities				

Learning outcomes		Assessment criteria			Evidence type	Portfolio reference	Date
3	Be able to promote and support customers' use of in-store web-based retail selling facilities	3.1	Promote use of the organisation's web-based facilities with enthusiasm, relating their features and benefits to the relevant needs of customers				
		3.2	Explain the use of the facilities: <ul style="list-style-type: none"> clearly and correctly in a manner which promotes understanding in a manner which is appropriate to their customers' existing appreciation and attitude to the technology being demonstrated 				
		3.3	Provide opportunities for customers to ask questions, checking for understanding				
		3.4	Respond to customers' questions in ways that promote sales and goodwill				
		3.5	Support customers in operating in-store web-based facilities as appropriate to their customers' needs and levels of confidence in the use the web-based facilities				

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
4	Be able to seek and use feedback regarding their own organisation's in-store web-based retail selling facilities	4.1	Seek feedback from customers upon the experience of using the organisation's web-based facilities			
		4.2	Respond to customer feedback in ways that promote goodwill			
		4.3	Report positive comments and any suggested improvements to the relevant person			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(if sampled)

Unit 86: Motivating colleagues to promote web-based retail facilities to customers

Unit reference number: Y/505/9381

QCF level: 3

Credit value: 4

Guided learning hours: 30

Unit summary

This unit assesses the occupational competence of individuals responsible for managing colleagues to promote web-based retail facilities. Colleagues may be any customer facing staff that may be providing information about web-based facilities.

Unit assessment requirements/evidence requirements

This unit requires workplace assessment of occupational competence.

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

People 1st Assessment Principles for Retail Qualifications can be found on their website (<http://www.people1st.co.uk>).

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

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

Learning outcomes		Assessment criteria			Evidence type	Portfolio reference	Date
1	Understand the factors to consider when motivating colleagues to promote web-based retail facilities to customers	1.1	Explain the main reasons why some colleagues may be concerned about the development and availability of web-based facilities in-store				
		1.2	Describe how to address the concerns of colleagues in relation to web-based retail facilities				
		1.3	Explain with whom in their own organisation it is appropriate to discuss activities designed to overcome colleagues' concerns regarding the use of web-based activities in-store				
		1.4	Explain different learning styles and how these can impact on how colleagues learn and develop skills in using web-based technology				
		1.5	Explain the importance of demonstrating respect for colleagues when helping them to use web-based technology				
		1.6	Describe how respect for colleagues can be demonstrated when helping them in the use of web-based technology				

Learning outcomes		Assessment criteria			Evidence type	Portfolio reference	Date
2	Be able to promote colleagues' use of in-store web-based retail selling facilities	2.1	Explain to colleagues the purpose of all aspects of their own organisation's relevant web-based facilities and the benefits for customers				
		2.2	Describe to colleagues the value of the facilities to their own organisation, including the opportunities that they present for engaging with customers in-store				
		2.3	Support colleagues in the use of the web-based facilities				
		2.4	Communicate with colleagues in a manner which promotes understanding and which demonstrates respect				
		2.5	Make sure that colleagues' achievements in the use of web-based facilities are recognised				

Learning outcomes		Assessment criteria			Evidence type	Portfolio reference	Date
3	Be able to address barriers to their colleagues' use of in-store web-based retail selling facilities	3.1	Determine the learning needs of colleagues relating to the use of their own organisation's web-based retail facilities, in line with their level of responsibility and organisational procedures				
		3.2	Address identified learning needs in line with organisational procedures				
		3.3	Identify positive and negative attitudes, where relevant, amongst colleagues regarding the web-based facilities				
		3.4	Identify any barriers and conflicts that may impact negatively upon colleagues' attitudes to the use of the web-based facilities				
		3.5	Discuss the needs of colleagues relating to the use of the web-based facilities with relevant people in their own organisation, protecting individual confidentiality where necessary				
		3.6	Recommend activities designed to promote positive attitudes towards and use of web-based facilities				
		3.7	Make sure that they act within their own levels of authority and expertise web-based facilities				

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____
(if sampled)

12 Further information and useful publications

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

- Edexcel: www.edexcel.com/contactus
- BTEC: www.btec.co.uk/contactus
- Pearson Work Based Learning: www.edexcel.com/about-wbl/Pages/Contact-us.aspx
- 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))
- *Equality Policy* (Pearson)
- *Recognition of Prior Learning Policy and Process* (Pearson)
- *UK Information Manual* (Pearson)
- *UK Quality Vocational Assurance Handbook* (Pearson).

All of these publications are available on our website.

Further information and publications on the delivery and quality assurance of NVQ/Competence-based qualifications are available at our website: www.edexcel.com/quals/NVQ-competence-based-qcf/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, www.edexcel.com

13 Professional development and training

Professional development and training

Pearson supports UK and international customers with training related to our qualifications. This support is available through a choice of training options offered on our website: www.edexcel.com/resources/Training.

The support we offer focuses on a range of issues, such as:

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

The national programme of training we offer is on our website at: www.edexcel.com/resources/Training. You can request centre-based training through the website or you can contact one of our advisers in the Training from Pearson UK team via Customer Services to discuss your training needs.

Training and support for the lifetime of the qualifications

Training and networks: our training programme ranges from free introductory events through sector-specific opportunities to detailed training on all aspects of delivery, assignments and assessment. We also host some regional network events to allow you to share your experiences, ideas and best practice with colleagues in your region.

Regional support: our team of Regional Quality Managers, based around the country, are responsible for providing quality assurance support and guidance to anyone managing and delivering NVQs/Competence-based qualifications. The Regional Quality Managers can support you at all stages of the standard verification process as well as in finding resolutions of actions and recommendations as required.

To get in touch with our dedicated support teams please visit our website at: www.edexcel.com/contactus

Online support: find the answers to your questions by browsing over 100 FAQs on our website or by submitting a query using our Work Based Learning Ask the Expert Service. You can search the database of commonly asked questions relating to all aspects of our qualifications in the work-based learning market. If you are unable to find the information you need, send us your query and our qualification or administrative experts will get back to you. The Ask the Expert service is available on our website at: www.pearsonwbl.edexcel.com/Our-support

Online forum

Pearson Work Based Learning Communities is an online forum where employers, further education colleges and workplace training providers can seek advice and clarification about any aspect of our qualifications and services, and share knowledge and information with others. The forums are sector specific and cover business administration, customer service, health and social care, hospitality and catering and retail. The online forum is available on our website at: www.pearsonwbl.edexcel.com/Our-support

14 Contact us

We have a dedicated Account Support team, across the UK, to give you more personalised support and advice. To contact your Account Specialist:

Email: wblcustomerservices@pearson.com

Telephone: 0844 576 0045

If you are new to Pearson and would like to become an approved centre, please contact us by:

Email: wbl@pearson.com

Telephone: 0844 576 0045

Complaints and feedback

We are working hard to give you excellent service. However, if any element of our service falls below your expectations, we want to understand why, so that we can prevent it from happening again. We will do all that we can to put things right.

If you would like to register a complaint with us, please email wblcomplaints@pearson.com.

We will formally acknowledge your complaint within two working days of receipt and provide a full response within seven working days.

Annexe A: People 1st assessment strategy

Assessment 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.

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 the assessment principles of this document.

Applied qualifications

Qualifications have been developed by Awarding Organisations and People1st 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.

Competence-based qualifications (Retail Skills)

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.

People1st Retail requires that Awarding Organisations:

- 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 RWE below for definition).
- 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 on simulation of these Assessment Principles. This should be expressed in guidance for qualifications operating in the sector.
- 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' (i.e. 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.

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 RWE section) 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.

Definition of a Realistic Working Environment (RWE)

Where simulation is used the sector requires that:

- Simulation must be undertaken in a Realistic Working Environment
- 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 (i.e. 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.

The role and competence of assessors, expert witnesses and verifier

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, People1st Retail requires that the following conditions be fulfilled.

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.

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.

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.

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. People1st 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.

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.

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.

Continuing professional development of assessors and verifiers

All assessors and verifiers, if not currently employed in 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.

External quality control of assessment

The application and implementation of external quality control (i.e. 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.

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 People1st Retail qualification**. The Awarding Organisation must obtain information on a number of specified 'risk factors' for each prospective centre at the point of approval. People1st 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.

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. People1st 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 2: Retail Skills units for which simulated activities are allowed

This list includes only People1st Retail's units. For guidance on assessing imported units, please refer to the relevant sector's own assessment principles.

SR ref.	Unit title	Unit code
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 People1st Retail's units. For guidance on assessing imported units, please refer to the relevant sector's own assessment principles.

SR ref.	Unit title	Unit code
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

SR ref.	Unit title	Unit code
C.21	Dismantle and store props and graphics from visual merchandising displays	M/503/5698
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 B: Personal, Learning and Thinking Skills mapping

PLTS	Unit	79 2
Independent Enquirers		
1 identify questions to answer and problems to resolve		•
2 plan and carry out research, appreciating the consequences of decisions		
3 explore issues, events or problems from different perspectives		
4 analyse and evaluate information, judging its relevance and value		
5 consider the influence of circumstances, beliefs and feelings on decisions and events		
6 support conclusions, using reasoned arguments and evidence		
Creative Thinkers		
1 generate ideas and explore possibilities		
2 ask questions to extend their thinking		•
3 connect their own and others' ideas and experiences in inventive ways		
4 question their own and others' assumptions		
5 try out alternatives or new solutions and follow ideas through		
6 adapt ideas as circumstances change		
Reflective Learners		
1 assess themselves and others, identifying opportunities and achievements		•
2 set goals with success criteria for their development and work		•
3 review progress, acting on the outcomes		•
4 invite feedback and deal positively with praise, setbacks and criticism		•
5 evaluate experiences and learning to inform future progress		•
6 communicate their learning in relevant ways for different audiences		
Team Workers		
1 collaborate with others to work towards common goals		•
2 reach agreements, managing discussions to achieve results		•
3 adapt behaviour to suit different roles and situations, including leadership roles		•
4 show fairness and consideration to others		•
5 take responsibility, showing confidence in themselves and their contribution		•
6 provide constructive support and feedback to others		•
Self-Managers		
1 seek out challenges or new responsibilities and show flexibility when priorities change		
2 work towards goals, showing initiative, commitment and perseverance		•
3 organise time and resources, prioritising actions		
4 anticipate, take and manage risks		
5 deal with competing pressures, including personal and work-related demands		
6 respond positively to change, seeking advice and support when needed		
7 manage their emotions, and build and maintain relationships		
Effective Participants		
1 discuss issues of concern, seeking resolution where needed		•
2 present a persuasive case for action		
3 propose practical ways forward, breaking these down into manageable steps		•
4 identify improvements that would benefit others as well as themselves		•
5 try to influence others, negotiating and balancing diverse views to reach workable solutions		•
6 act as an advocate for views and beliefs that may differ from their own		•

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