Pearson
Edexcel Level 2 Award and Certificate in Forklift Truck Operations

Specification

NVQ/Competence-based qualification

First registration April 2013

Issue 3

Edexcel, BTEC and LCCI qualifications

Edexcel, BTEC and LCCI qualifications are awarded by Pearson, the UK's largest awarding body offering academic and vocational qualifications that are globally recognised and benchmarked. For further information, please visit our qualifications website at qualifications.pearson.com. Alternatively, you can get in touch with us using the details on our contact us page at qualifications.pearson.com/contactus

About Pearson

Pearson is the world's leading learning company, with 35,000 employees in more than 70 countries working to help people of all ages to make measurable progress in their lives through learning. We put the learner at the centre of everything we do, because wherever learning flourishes, so do people. Find out more about how we can help you and your learners at qualifications.pearson.com

This specification is Issue 3. Key changes are listed in the summary table on the next page. We will inform centres of any changes to this issue. The latest issue can be found on the Pearson website: qualifications.pearson.co

These qualifications were previously known as:

Pearson Edexcel Level 2 Award and Certificate in Forklift Truck (QCF)

The QN remains the same.

Summary of Pearson Edexcel Level 2 Award and Certificate in Forklift Truck Operations specification Issue 3 changes

Summary of changes made between previous issue and this current issue	Page/section number
All references to QCF have been removed throughout the specification	
Definition of TQT added	Section 1
Definition of sizes of qualifications aligned to TQT	Section 1
Credit value range removed and replaced with lowest credit value for the shortest route through the qualification	Section 2
TQT value added	Section 2
GLH range removed and replaced with lowest GLH value for the shortest route through the qualification	Section 2
Reference to credit transfer within the QCF removed	Section 4
QCF references removed from unit titles and unit levels in all units	Section 11
Guided learning definition updated	Section 11

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

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

Contents

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 guidance/strategy as published by the relevant Sector Skills Council/Standards Setting Body

- the Apprenticeship Frameworks in which the qualifications are included, where appropriate.

1 Introducing Pearson Edexcel NVQ/Competence-based qualifications

What are NVQ/Competence-based qualifications?

National Vocational Qualifications (NVQs) or Competence-based qualifications reflect the skills and knowledge needed to do a job effectively. They are work-based qualifications that give learners the opportunity to demonstrate their competence in the area of work or job role to which the qualification relates.

NVQs/Competence-based qualifications are outcomes-based with no fixed learning programme, allowing flexibility in their delivery to meet the individual learner's needs. The qualifications are based on the National Occupational Standards (NOS) for the sector, which define what employees, or potential employees, must be able to do and know, and how well they should undertake work tasks and work roles.

Most NVQ/Competence-based qualifications form the competence component of Apprenticeship Frameworks. 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.

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

Sizes of NVQ/Competence-based qualifications

For all regulated qualifications, we specify a total number of hours that learners are expected to undertake in order to complete and show achievement for the qualification – this is the Total Qualification Time (TQT). The TQT value indicates the size of a qualification.

Within the TQT, we identify the number of Guided Learning Hours (GLH) that a centre delivering the qualification needs to provide. Guided learning means activities that directly or immediately involve tutors and assessors in teaching, supervising, and invigilating learners, for example lectures, tutorials, online instruction and supervised study.

As well as guided learning, there may be other required learning that is directed by tutors or assessors. This includes, for example, private study, preparation for assessment and undertaking assessment when not under supervision, such as preparatory reading, revision and independent research.

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

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

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

- Award – a qualification with a TQT value of 120 or less (equivalent to a range of 1–12 credits)

- Certificate – a qualification with a TQT value in the range of 121–369 (equivalent to a range of 13–36 credits)

- Diploma – a qualification with a TQT value of 370 or more (equivalent to 37 credits and above).

2 Qualification summary and key information

Qualification title	Pearson Edexcel Level 2 Award in Forklift Truck Operations
Qualification Number (QN)	600/8600/2
Regulation start date	13/04/2013
Operational Start date	01/04/2013
Approved age ranges	16-18 19+ *Although the qualifications can be taken from the age of 16, so that learners can work towards units of this qualification to develop the necessary knowledge and skills, the actual age learners start to drive a forklift truck may be set above 16 by particular employers. Typically, this may be 17 and above. Minimum age restrictions apply, as specified in road traffic legislation, if forklift trucks are operated on public roads which require an appropriate driving licence to be held for the weight of the vehicle. For goods vehicles, vehicles weighing over 3.5 tonnes but less than 7.5 tonnes may be driven from the age of 18, and which weigh more than 7.5 tonnes may be driven from the age of 21 only.
Credit value	12
Assessment	Portfolio of Evidence (internal assessment)
Total Qualification Time (TQT)	120
Guided learning hours	45
Grading information	The qualification and units are graded pass/fail.
Entry requirements	No prior knowledge, understanding, skills or qualifications are required before learners register for this qualification. However, centres must follow the Pearson Access and Recruitment policy (see *Section 9, Access and Recruitment*)
Funding	Qualifications eligible and funded for post-16-year-olds can be found on the funding Hub. The Skills Funding Agency also publishes a funding catalogue that lists the qualifications available for 19+ funding.

Qualification title	Pearson Edexcel Level 2 Certificate in Forklift Truck Operations
Qualification Number (QN)	600/8599/X
Regulation start date	13/04/2013
Operational Start date	01/04/2013
Approved age ranges	16-18 19+ *Although the qualifications can be taken from the age of 16, so that learners can work towards units of this qualification to develop the necessary knowledge and skills, the actual age learners start to drive a forklift truck may be set above 16 by particular employers. Typically, this may be 17 and above. Minimum age restrictions apply, as specified in road traffic legislation, if forklift trucks are operated on public roads which require an appropriate driving licence to be held for the weight of the vehicle. For goods vehicles, vehicles weighing over 3.5 tonnes but less than 7.5 tonnes may be driven from the age of 18, and which weigh more than 7.5 tonnes may be driven from the age of 21 only.
Credit value	24
Assessment	Portfolio of Evidence (internal assessment)
Total Qualification Time (TQT)	240
Guided learning hours	113
Grading information	The qualification and units are graded pass/fail.
Entry requirements	No prior knowledge, understanding, skills or qualifications are required before learners register for this qualification. However, centres must follow the Pearson Access and Recruitment policy (see *Section 9, Access and Recruitment*)
Funding	Qualifications eligible and funded for post-16-year-olds can be found on the funding Hub. The Skills Funding Agency also publishes a funding catalogue that lists the qualifications available for 19+ funding.

Qualification number and qualification title

Centres will need to use the Qualification Number (QN) when they seek public funding for their learners. As well as a QN, each unit within a qualification has a 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 the *Edexcel Information Manual,* available on our website: qualifications.pearson.com

Qualifications objectives

The Pearson Edexcel Level 2 Award and Certificate in Forklift Truck Operations gives learners the opportunity to:

- demonstrate competence and knowledge in Forklift Truck Operations to the standard of professionalism required by the sector as defined by Skills for Logistics.

- have existing skills recognised

- achieve a nationally-recognised Level 2 qualification

- develop their own personal growth and engagement in learning

The Pearson Edexcel Level 2 Award and Level 2 Certificate in Forklift Truck Operations will be particularly useful for learners who have recently started job roles in warehousing and storage with responsibilities for operating forklift trucks. The qualifications require learners to prepare and operate a forklift truck but also include wider competences such as contributing to customer service, health and safety and handling goods.

Relationship with previous qualifications

These qualifications replace the Pearson Edexcel Level 2 NVQ in Specialised Plant and Machinery Operations (Lifting and Transferring) which has expired.

Progression opportunities

Learners who achieve the Pearson Edexcel Level 2 Award in Forklift Truck Operations can progress to the Level 2 Certificate in Forklift Truck Operations or a variety of level 2 and level 3 logistics related qualifications as detailed below.

Learners who achieve the Pearson Edexcel Level 2 Certificate in Forklift Truck Operations can progress to a variety of level 2 and level 3 logistics related qualifications, including:

Pearson Edexcel Level 2 Certificate in Warehousing and Storage

Pearson BTEC Level 2 Certificate in Warehousing and Storage Principles

Pearson Edexcel Level 3 Diploma in Warehousing and Storage

Pearson Edexcel Level 2 Certificate in Logistics Operations

Pearson Edexcel Level 3 Certificate in Logistics Operations

Pearson Edexcel Level 2 Certificate in International Trade and Logistics Operations

Pearson Edexcel Level 2 Certificate in Traffic Office (QCF), Edexcel Level 3 Certificate in Traffic Office

Pearson Edexcel Level 2 Certificate in Driving Goods Vehicles

Pearson Edexcel Level 2 Diploma in Transporting Goods by Road

Pearson Edexcel Level 3 Diploma in Driving Goods Vehicles

Pearson Edexcel Level 3 Certificate in Transporting Freight by Road

Industry support and recognition

These qualifications are supported by Skills for Logistics, the Skills Council for the UK's freight logistics industries.

Relationship with National Occupational Standards

These qualifications are based on the Specialised Plant and Machinery Operations standards found within the Warehousing and Storage National Occupational Standards (NOS). The NOS, assessment guidance and qualification structures are owned by Skills for Logistics.

3 Qualification structures

Pearson Edexcel Level 2 Award in Forklift Truck Operations

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	12
Number of mandatory credits that must be achieved	12

Unit	Unit reference number	Mandatory units	Level	Credit	Guided learning
1	F/503/7780	Prepare the Forklift Truck for Driving or Manoeuvring	2	1	6
2	J/503/7781	Operate, Move or Manoeuvre the Forklift Truck	2	2	7
3	L/503/7782	Select, Transfer and Position Loads Using a Forklift Truck	2	2	8
4	D/503/7785	Undertake Post-operational Checks on Forklift Trucks	2	1	6
5	R/503/7783	Load the Container, Vehicle, Vessel or Craft Using a Forklift Truck	2	3	9
6	M/504/7513	Unload the Container, Vehicle, Vessel or Craft Using a Forklift Truck	2	3	9

* The learner's notification of performance will denote the equipment the learner has used to achieve the qualification. The choice of equipment includes:

- Counterbalanced Forklift Truck
- Reach Truck
- Pivot Steer Forklift Truck
- Side Loader/Swing Mast Truck
- Telescopic Handler
- Order Picker
- Narrow Aisle or Reach Trucks/Very Narrow Aisle Trucks
- Guided Very Narrow aisle equipment
- Lorry Mounted Forklift Truck

When making a certificate claim, centres should follow the instructions to select the equipment that was used. The equipment selected will appear on the learner's notification of performance. NB Only one piece of equipment can be selected.

Pearson Edexcel Level 2 Certificate in Forklift Truck Operations

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
Number of mandatory credits that must be achieved	17
Number of option credits that must be achieved. A minimum of 1 credit from Group B, a minimum of 3 credits from Group C and a minimum of 3 credits from Group D.	7

Unit	Unit reference number	Mandatory units	Level	Credit	Guided learning
1	F/503/7780	Prepare the Forklift Truck for Driving or Manoeuvring	2	1	6
2	J/503/7781	Operate, Move or Manoeuvre the Forklift Truck	2	2	7
3	L/503/7782	Select, Transfer and Position Loads Using a Forklift Truck	2	2	8
4	D/503/7785	Undertake Post-operational Checks on Forklift Trucks	2	1	6
7	A/601/9451	Obtain Information on the Collection and/or Delivery of Loads	2	2	10
8	Y/601/9456	Make an Effective Contribution to a Business in the Logistics Sector	2	3	10
9	Y/601/7920	Contribute to the Provision of Customer Service in Logistics Operations	2	3	18
10	K/502/1072	Health, Safety and Security at Work	2	3	20
Unit	Unit reference number	Optional units	Level	Credit	Guided learning
Option Group B: Learners must complete a minimum of one unit from this group (minimum 1 credit).					
11	F/601/7913	Keep Work Areas Clean in Logistics Operations	2	3	10
12	L/601/7929	Maintain Hygiene Standards in Handling and Storing Goods in Logistics Operations	2	3	16
13	H/600/6578	Principles of Food Safety in Logistics	2	1	9

Unit	Unit reference number	Optional units	Level	Credit	Guided learning
Option Group C: Learners must complete a minimum of one unit from this group (minimum 3 credits)					
14	J/601/7914	Moving and/or Handling Goods in Logistics Operations	2	4	15
15	R/601/7933	Sort Goods and Materials for Recycling or Disposal in Logistics Operations	2	3	10
16	Y/601/7917	Wrap and Pack Goods in Logistics Operations	2	3	12
Option Group D Learners must complete a minimum of one unit from this group (minimum 3 credits)					
5	R/503/7783	Load the Container, Vehicle, Vessel or Craft Using a Forklift Truck	2	3	9
6	M/504/7513	Unload the Container, Vehicle, Vessel or Craft Using a Forklift Truck	2	3	9

* The learner's notification of performance will denote the equipment the learner has used to achieve the qualification. The choice of equipment includes:

- Counterbalanced Forklift Truck

- Reach Truck

- Pivot Steer Forklift Truck

- Side Loader/Swing Mast Truck

- Telescopic Handler

- Order Picker

- Narrow Aisle or Reach Trucks/Very Narrow Aisle Trucks

- Guided Very Narrow aisle equipment

- Lorry Mounted Forklift Truck

When making a certificate claim, centres should follow the instructions to select the equipment that was used. The equipment selected will appear on the learner's notification of performance. NB Only one piece of equipment can be selected.

4 Assessment

These qualifications are assessed through an externally verified Portfolio of Evidence that consists of evidence gathered during the course of the learner's work.

To achieve a pass for the full qualification, the learner must achieve all the required units in the stated qualification structure. 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, and it should be cross-referenced to the evidence provided. The assessment record should include details of the type of evidence and the date of assessment. The unit specification or suitable centre documentation can be used to form an assessment record.

It is important that the evidence provided to meet the assessment criteria of 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, whether at or away from the workplace. The evidence provided must meet the requirements of the Sector Skills Council's assessment guidance.

- the **Recognition of Prior Learning (RPL)** where a learner can demonstrate that they can meet the assessment criteria within a unit through knowledge, understanding or skills they already possess without undertaking a course of development. They must submit sufficient, reliable, authentic and valid evidence for assessment. Evidence submitted based on RPL should provide confidence that the same level of skill/understanding/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 the policy document *Recognition of Prior Learning Policy*, available on the Pearson website.

- a **combination** of these.

Assessment Guidance

The assessment guidance for these qualifications has been included in *Annexe A*. It sets out the overarching assessment principles and the framework for assessing the qualifications to ensure that they remain valid and reliable. It has been developed by Skills for Logistics 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 as well as the requirements of the Skills for Logistics assessment guidance. As stated in the assessment guidance, the evidence for these qualifications 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)

- outcomes from simulation (S)

- professional discussion (PD)

- assignment, project/case studies (A)

- authentic statements/witness testimony (WT)

- expert witness testimony (EWT)

- evidence of Recognition of Prior Learning (RPL).

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

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. Evidence must be available to the assessor, internal verifier and Pearson standards verifier.

Any specific evidence requirements for individual units are stated in the unit introduction for the units in *Section 11*.

There is further guidance about assessment on our website. Please see *Section 12* for details.

Assessment of knowledge

The units within these qualifications include knowledge-based learning outcomes and assessment criteria. The evidence provided to meet these learning outcomes and assessment criteria must be in line with Skills for Logistics assessment guidance. Any specific assessment requirements are stated in the unit introduction for the units in *Section 11*.

Centres need to look closely at the verbs used for each assessment criterion in the units when devising the assessment to ensure that learners can provide evidence with sufficient breadth and depth to meet the requirements. Any assignment brief should indicate clearly, which assessment criteria are being targeted.

Centres are encouraged to give learners realistic scenarios and to maximise the use of practical activities in delivery and assessment. To avoid over-assessment, centres are encouraged to link delivery and assessment across the knowledge-based learning outcomes.

5 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.

- Centres must have the appropriate physical resources to support both the 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 guidance for the sector, equipment, machinery, IT, learning materials, teaching rooms.

- Where permitted, RWE 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 guidance in Annexe A. Staff assessing learners must meet the occupational competence requirements within the overarching assessment guidance for the sector.

- There must be systems in place to ensure the continuing professional development for staff delivering the qualifications.

- Centres must have appropriate health and safety policies, procedures and practices in place for the delivery of the qualifications.

- 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 9 Access and recruitment* and *Section 10 Access to qualifications for learners with disabilities or specific needs*. For full details on the Equality Act 2010, please go to the Home Office website, www.gov.uk/government/organisations/home-office

6 Centre recognition and approval

Centre recognition

Centres that have not previously offered Pearson Edexcel accredited 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 Edexcel 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.

7 Quality assurance of centres

Quality assurance is at the heart of vocational qualifications. Centres will internally assess NVQs/Competence-based qualifications using internal quality assurance procedures to ensure standardisation of assessment across all learners. 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, if needed, to safeguard certification. It also allows us to recognise and support good practice.

For the qualifications in this specification, the Pearson quality assurance model is as described below.

Centres offering Pearson Edexcel NVQs/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 must reflect the centre's performance, taking account of the number:

- of assessment sites

- and throughput of learners

- and turnover of assessors

- and turnover of internal verifiers.

For centres offering a full Pearson BTEC Apprenticeship (i.e. all elements of the Apprenticeship are delivered with Pearson through registration of learners on a Pearson BTEC Apprenticeship framework) a single standards verifier will be allocated to verify all elements of the Pearson BTEC Apprenticeship programme. If a centre is also offering stand-alone NVQs/Competence-based qualifications in the same sector as a full Pearson BTEC Apprenticeship, the same standards verifier will be allocated.

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

Centres are required to declare their commitment to ensuring quality and to providing appropriate opportunities for learners that lead to valid and accurate assessment outcomes.

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

8   Programme delivery

Centres are free to offer the qualifications using any mode of delivery (for example full-time, part-time, evening only, distance learning,) that meets learners' needs. However, centres must make sure that learners have access to the resources identified in the specification and to the sector specialists delivering and assessing the units. Centres must have due regard to Pearson's policies that may apply to different modes of delivery.

Those planning the programme should aim to address the occupational nature of the qualification by:

- engaging with learners, initially, through planned induction, and subsequently through the involvement of learners in planning for assessment opportunities

- using naturally occurring workplace activities and products to present evidence for assessment against the requirements of the qualification

- developing a 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

- taking advantage of suitable digital methods to capture evidence.

9 Access and recruitment

Pearson's policy regarding access to its qualifications is that:

• they should be available to everyone who is capable of reaching the required standards

• they should be free from any 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.

For learners with disabilities and specific needs, this review will need to take account of the support available to them during the delivery and assessment of the qualification. The review must take account of the information and guidance in *Section 10 Access to qualifications for learners with disabilities or specific needs*.

10 Access to qualifications for learners with disabilities or specific needs

Equality and fairness are central to our work. Pearson's Equality Policy requires that all learners should 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.

Learners taking a qualification can be assessed in British sign language or Irish sign language where it is permitted for the purpose of reasonable adjustments.

Further information regarding 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*. Further details on how to make adjustments for learners with protected characteristics are given in the *Supplementary Guidance for Reasonable Adjustment and Special Consideration in Vocational Internally Assessed Units*.

These documents are available on our website, at http://qualifications.pearson.com/en/support/support-topics/understanding-our-qualifications/policies-for-centres-learners-and-employees.html

11 Unit format

Each unit has the following sections.

Unit title

This is the formal title of the unit that will appear on the learner's certificate.

Unit reference number

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

Level

All units and qualifications have a level assigned to them. The level assigned is informed by the level descriptors by Ofqual, the qualifications regulator.

Credit value

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

Guided learning

Guided Learning Hours (GLH) is the number of hours that a centre delivering the qualification needs to provide. Guided learning means activities that directly or immediately involve tutors and assessors in teaching, supervising, and invigilating learners, for example lectures, tutorials, online instruction and supervised study.

Unit aim

This gives a summary of what the unit aims to do.

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 of a unit set out what a learner knows, understands or is able to do as the result of a process of learning.

Assessment criteria

The assessment criteria specify the standard required by the learner to achieve the learning outcome.

Unit 1: Prepare the Forklift Truck for Driving or Manoeuvring

Unit reference number:	F/503/7780
Level:	2
Credit value:	1
Guided learning hours:	6

Unit summary

This unit is about preparing the forklift truck for driving or manoeuvring. Learners will know about relevant organisational policies for preparing a forklift truck in a logistics environment, how to check fuel for a task and different controls. They will also learn about driver's responsibilities and how to obtain information on previously reported problems. Learners will prepare a forklift truck themselves and carry out any adjustments. This unit is relevant to those working in the logistics sector either individually or as part of a team.

Assessment methodology

Evidence of achievement for this unit should be drawn from the workplace except where Skills for Logistics makes provision for evidence to be produced through simulation, as specified in the Skills for Logistics overarching assessment guidance.

An assessment record must be created that identifies the assessment criteria that have been met and cross-references these to the evidence provided. The assessment record should include details of the type of evidence and the date of assessment.

The unit specification or suitable centre documentation could be used to form an assessment record.

Please note that the title for this unit suggests that there are different evidence requirements for 'driving' and 'manoeuvring' a forklift truck and that learners may gather evidence for either of these activities. This is a reflection of how a forklift truck is used within the work environment. The evidence to achieve the assessment standard is the same for driving or manoeuvring and so there is no choice for the learner.

Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria		Evidence type	Portfolio reference	Date
1 Know how to prepare the fork lift truck for driving or manoeuvring	1.1	Explain the relevant organisational policies and procedures for preparing the forklift truck in logistics operations that relate to: • health, safety and security • personal protective equipment • legal requirements • operating requirements			
	1.2	Explain how to check that the forklift truck has sufficient fuel or energy for the task or shift			
	1.3	Explain the operation of the forklift truck's instruments and controls to include: • how to check the vehicle systems • how to check instruments, controls, gauges and vehicle systems • position of forks and/or attachments for the load or travelling • indications of electrical or mechanical problems			
	1.4	Explain the responsibilities of the forklift truck driver for the forklift truck and the load			
	1.5	Explain the organisational procedures for reporting defects including information on previously reported problems with the forklift truck			

Learning outcomes	Assessment criteria		Evidence type	Portfolio reference	Date
	1.6	Explain how to obtain information on previously reported problems with the forklift truck			
	1.7	Explain which person(s) is officially responsible for allocating equipment or tasks			
	1.8	Identify problems that can occur when preparing the forklift truck for driving or manoeuvring			
	1.9	Explain the appropriate action to take, in order to deal with identified problems			
2 Be able to prepare the forklift truck for driving or manoeuvring	2.1	Follow all relevant organisational policies and procedures for preparing the forklift truck in logistics operations that relate to: • health, safety and security • personal protective equipment • legal requirements • operating requirements			
	2.2	Check the forklift truck has sufficient fuel or energy for the task or shift			
	2.3	Check the forklift truck systems to ensure the forklift truck complies with operational and legal requirements			
	2.4	Carry out adjustments to optimise control, observation and comfort			

Learning outcomes	Assessment criteria		Evidence type	Portfolio reference	Date
	2.5	Check that any ancillary attachments are in working order			
	2.6	Position forklift truck and any attachments used in an authorised position, location or parking bay as appropriate when not in use			

Learner name: _____   Date: _____

Learner signature: _____   Date: _____

Assessor signature: _____   Date: _____

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

Unit 2:   Operate, Move or Manoeuvre the Forklift Truck

Unit reference number: J/503/7781

Level: 2

Credit value: 2

Guided learning hours: 7

Unit summary

This unit is about operating, moving or manoeuvring a forklift truck in the logistics environment. Learners will know about relevant organisational policies for operating, moving or manoeuvring the forklift truck and be aware of the observations required for tasks and of potential problems that can arise. Learners will also apply their knowledge in operating a forklift truck themselves and carry out a risk assessment. This unit is relevant to those working in the logistics sector either individually or as part of a team.

Assessment methodology

Evidence of achievement for this unit should be drawn from the workplace except where Skills for Logistics makes provision for evidence to be produced through simulation, as specified in the Skills for Logistics overarching assessment guidance.

An assessment record must be created that identifies the assessment criteria that have been met and cross-references these to the evidence provided. The assessment record should include details of the type of evidence and the date of assessment.

The unit specification or suitable centre documentation could be used to form an assessment record.

Please note that the title for this unit suggests that there are different evidence requirements to 'operate', 'move' or 'manoeuvre' a forklift truck and that learners may gather evidence for any of these activities. This is a reflection of how a forklift truck is used within the work environment. The evidence to achieve the assessment standard is the same for operating, moving or manoeuvring and so there is no choice for the learner.

Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria		Evidence type	Portfolio reference	Date
1 Know how to operate, move or manoeuvre the forklift truck	1.1	Explain the relevant organisational policies and procedures for operating, moving or manoeuvring the forklift truck in logistics operations that relate to: • health, safety and security • personal protective equipment • legal requirements • operating requirements • different locations • different loads • theft or damage to truck and/or load			
	1.2	Explain the observations required for operating, moving or manoeuvring the forklift truck			
	1.3	Explain how different audible and/or visual warning devices are used			
	1.4	Describe the risks associated with driving, moving or manoeuvring the forklift truck at different locations			
	1.5	Explain the factors that can affect the stability of the forklift truck			
	1.6	Describe how to identify damage or deterioration in the condition of the load			
	1.7	Identify problems that can occur when driving, moving or manoeuvring the forklift truck			

Learning outcomes	Assessment criteria		Evidence type	Portfolio reference	Date
	1.8	Explain the appropriate action to take, in order to deal with identified problems			
2 Be able to operate, move or manoeuvre the forklift truck	2.1	Follow all relevant organisational policies and procedures for operating, moving or manoeuvring the forklift truck in logistics operations that relate to: • health, safety and security • personal protective equipment • legal requirements • operating requirements • different locations • different loads • theft or damage			
	2.2	Undertake a visual risk assessment of the working area			
	2.3	Check visual aids to ensure all round vision			
	2.4	Mount the equipment safely making appropriate adjustments to the controls			
	2.5	Position forks or attachments for loading or travelling			
	2.6	Undertake correct observations			
	2.7	Operate, move or manoeuvre the forklift truck smoothly maintaining stability of both forklift truck and load			

Learning outcomes	Assessment criteria		Evidence type	Portfolio reference	Date
	2.8	Negotiate inclines and declines in a manner that will maintain the stability of both forklift truck and the load			
	2.9	Locate a suitable space for turning, aligning the pivot and reference points			
	2.10	Turn the forklift truck in a manner that will maintain the stability of both forklift truck and the load			
	2.11	Stop the forklift truck in a manner that will maintain the stability of both forklift truck and the load			
	2.12	Position the forklift truck and any attachments used in an authorised position, location or parking bay as appropriate when not in use			
	2.13	Dismount the forklift truck safely			
	2.14	Record all work according to organisational requirements			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

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

Unit 3: Select, Transfer and Position Loads Using a Forklift Truck

Unit reference number:	L/503/7782
Level:	2
Credit value:	2
Guided learning hours:	8

Unit summary

This unit is about selecting, transferring and positioning loads using a forklift truck in a logistics environment. Learners will know how to ensure the safety of loads when selecting, transferring and positioning, and factors affecting the stability of loads. Learners will also apply their knowledge in transferring loads using a forklift truck. This unit is relevant to those working in the logistics sector either individually or as part of a team.

Assessment methodology

Evidence of achievement for this unit should be drawn from the workplace except where Skills for Logistics makes provision for evidence to be produced through simulation, as specified in the Skills for Logistics overarching assessment guidance.

An assessment record must be created that identifies the assessment criteria that have been met and cross-references these to the evidence provided. The assessment record should include details of the type of evidence and the date of assessment.

The unit specification or suitable centre documentation could be used to form an assessment record.

Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria		Evidence type	Portfolio reference	Date
1 Know how to select, transfer and position loads using a forklift truck	1.1	Explain the relevant organisational policies and procedures for selecting, transferring and positioning loads using the forklift truck that relate to: • health, safety and security • personal protective equipment • legal requirements • lifting systems • different locations • different loads			
	1.2	Explain how to ensure the load is safe for the operation			
	1.3	Explain how to set the forks or attachments to ensure the stability and security of the load			
	1.4	Explain factors that can affect the stability of the forklift truck when engaged in selecting, transferring and positioning loads			
	1.5	Explain the dangers of overloading the forklift truck			
	1.6	Identify problems that can occur when selecting, transferring and positioning loads using a forklift truck			
	1.7	Explain the appropriate action to take in order to deal with identified problems			

Learning outcomes	Assessment criteria		Evidence type	Portfolio reference	Date
2 Be able to select, transfer and position loads using a forklift truck	2.1	Follow all organisational policies and procedures for selecting, transferring and positioning the forklift truck that relate to: • health, safety and security • personal protective equipment • legal requirements • forklift operating systems • different locations • different loads			
	2.2	Identify the correct load			
	2.3	Check the load is safe for the operation			
	2.4	Set forks and/or attachments to ensure the stability of the load			
	2.5	Position the load for transportation			
	2.6	Check the stability and security of the load during positioning and transportation			
	2.7	Operate the vehicle controls to maintain the safety, security of yourself, the forklift truck and others			
	2.8	Communicate effectively			
	2.9	Check that the safety and security of the load is maintained during transfer			
	2.10	Check that the location allocated for the load is suitable			

Learning outcomes	Assessment criteria		Evidence type	Portfolio reference	Date
	2.11	Set the load down in the correct position and location safely			
	2.12	Record all work according to organisational requirements			

Learner name: _____   Date: _____

Learner signature: _____   Date: _____

Assessor signature: _____   Date: _____

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

Unit 4: Undertake Post-operational Checks on Forklift Trucks

Unit reference number:	D/503/7785
Level:	2
Credit value:	1
Guided learning hours:	6

Unit summary

This unit is about how to undertake post-operational checks for a forklift truck in a logistics environment. Learners will identify information relating to maintenance checks and know how to carry out procedures. They will also undertake post-operational checks themselves complying with any regulations and recording work against operational tasks. This unit is relevant to those working in the logistics sector either individually or as part of a team.

Assessment methodology

Evidence of achievement for this unit should be drawn from the workplace except where Skills for Logistics makes provision for evidence to be produced through simulation, as specified in the Skills for Logistics overarching assessment guidance.

An assessment record must be created that identifies the assessment criteria that have been met and cross-references these to the evidence provided. The assessment record should include details of the type of evidence and the date of assessment.

The unit specification or suitable centre documentation could be used to form an assessment record.

Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria		Evidence type	Portfolio reference	Date
1 Know how to undertake post-operational checks for a fork lift truck	1.1	Explain the relevant organisational policies and procedures for undertaking post-operational checks for the forklift truck that relate to: • health, safety and security • personal protective equipment • legal requirements • lifting systems			
	1.2	Identify information relating to daily, weekly and/or monthly maintenance checks			
	1.3	Explain how to carry out required post-operational checks			
	1.4	Identify problems that can occur when undertaking post-operational checks for a forklift truck			
	1.5	Explain the appropriate action to take, in order to deal with identified problems			

Learning outcomes	Assessment criteria		Evidence type	Portfolio reference	Date
2 Be able to undertake post operational checks for forklift trucks	2.1	Follow all organisational policies and procedures for undertaking post-operational checks for the forklift truck that relate to: • health, safety and security • personal protective equipment • legal requirements • forklift operating systems			
	2.2	Undertake the routine checks that must be carried out after using the forklift truck			
	2.3	Check that the regulations relating to the forklift truck are met			
	2.4	Demonstrate how to complete post-operational checks according to operational and organisational procedures			
	2.5	Position the forklift truck and any attachments used in an authorised position, location or parking bay as appropriate when not in use			
	2.6	Record all work according to organisational procedures			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

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

Unit 5:   Load the Container, Vehicle, Vessel or Craft Using a Forklift Truck

Unit reference number:	R/503/7783
Level:	2
Credit value:	3
Guided learning hours:	9

Unit summary

This unit is about loading vessels using a forklift truck following organisational procedures in a logistics environment. Learners will gain knowledge of how to prepare the forklift truck and vessel for loading and take appropriate actions to deal with identified problems. They will also use a forklift truck in a loading operation. This unit is relevant to those working in the logistics sector either individually or as part of a team.

Assessment methodology

Evidence of achievement of this unit should be drawn from the workplace except where Skills for Logistics makes provision for evidence to be produced through simulation, as specified in the Skills for Logistics overarching assessment guidance.

An assessment record must be created that identifies the assessment criteria that have been met and cross-references these to the evidence provided. The assessment record should include details of the type of evidence and the date of assessment.

The unit specification or suitable centre documentation could be used to form an assessment record.

Please note that the title for this unit suggests that there are different evidence requirements for loading the 'container', 'vehicle' or 'vessel' using a forklift truck and that learners may gather evidence for any of these. This is a reflection of the different loads that a forklift truck uses within the work environment. The evidence to achieve the assessment standard is the same for different loads and so there is no choice for the learner.

Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria		Evidence type	Portfolio reference	Date
1 Know how to load the container, vehicle, vessel or craft using a forklift truck	1.1	Explain the relevant organisational policies and procedures for undertaking post-operational checks for the forklift truck that relate to: • health, safety and security • personal protective equipment • legal requirements • lifting systems • different locations • different containers, vehicles, vessels or craft • different loads			
	1.2	Explain how to ensure the load is safe for the operation			
	1.3	Explain how to set the forks or attachments to ensure the stability and security of the load			
	1.4	Explain factors that can affect the stability of the forklift truck when engaged in loading the container, vehicle, vessel or craft			
	1.5	Explain the dangers of overloading the forklift truck			
	1.6	Explain load restrictions for the container, vehicle, vessel or craft			
	1.7	Explain factors that can affect loading and delivery sequences			

Learning outcomes	Assessment criteria		Evidence type	Portfolio reference	Date
	1.8	Explain the dangers of overloading the container, vehicle, vessel or craft			
	1.9	Identify problems that can occur when loading the container, vehicle, vessel or craft using a forklift truck			
	1.10	Explain the appropriate action to take, in order to deal with identified problems			
2 Be able to load the container, vehicle, vessel or craft using a fork lift truck	2.1	Follow organisational policies and procedures for loading the container, vehicle, vessel or craft using the forklift truck that relate to: • health, safety and security • personal protective equipment • legal requirements • forklift operations • different locations • different containers, vehicles, vessels or craft • different loads			
	2.2	Identify the correct container, vehicle, vessel or craft to be loaded			
	2.3	Identify the correct load			
	2.4	Check the load is safe for the operation			
	2.5	Set forks and/or attachments to ensure the stability of the load			

Learning outcomes	Assessment criteria		Evidence type	Portfolio reference	Date
	2.6	Check the stability and security of the load during positioning and loading the container, vehicle, vessel or craft			
	2.7	Ensure the load and container, vehicle, vessel or craft are compatible			
	2.8	Maintain the safety, security of yourself, the forklift truck and others when manoeuvring the forklift truck			
	2.9	Operate the forklift truck controls to maintain the safety, security of yourself, the forklift truck and others			
	2.10	Communicate effectively			
	2.11	Check that the safety and security of the load is maintained during transfer			
	2.12	Set the load down safely in the correct position and location			
	2.13	Load the container, vehicle, vessel or craft in the appropriate manner for the type of load or delivery sequence			
	2.14	Record all work according to organisational requirements			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

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

Unit 6: Unload the Container, Vehicle, Vessel or Craft Using a Forklift Truck

Unit reference number: M/504/7513

Level: 2

Credit value: 3

Guided learning hours: 9

Unit summary

This unit is about unloading different vessels using a forklift truck following organisational procedures in a logistics environment. Learners will gain the knowledge of how to prepare the forklift truck and vessel for unloading and take appropriate actions to deal with identified problems. They will also use a forklift truck in an unloading operation. This unit is relevant to those working in the logistics sector either individually or as part of a team.

Assessment methodology

Evidence of achievement for this unit should be drawn from the workplace except where Skills for Logistics makes provision for evidence to be produced through simulation, as specified in the Skills for Logistics overarching assessment guidance.

An assessment record must be created that identifies the assessment criteria that have been met and cross-references these to the evidence provided. The assessment record should include details of the type of evidence and the date of assessment.

The unit specification or suitable centre documentation could be used to form an assessment record.

Please note that the title for this unit suggests that there are different evidence requirements for unloading the 'container', 'vehicle' or 'vessel' using a forklift truck and that learners may gather evidence for any of these. This is a reflection of the different loads that a forklift truck uses within the work environment. The evidence to achieve the assessment standard is the same for different loads and so there is no choice for the learner.

Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria		Evidence type	Portfolio reference	Date
1 Know how to unload the container, vehicle, vessel or craft using a forklift truck	1.1	Explain the relevant organisational policies and procedures for unloading the container, vehicle, vessel or craft that relate to: • health, safety and security • personal protective equipment • legal requirements • lifting systems • different locations • different containers, vehicles, vessels or craft • different loads • proof of delivery systems			
	1.2	Explain how to ensure the load is safe for the operation			
	1.3	Explain how to set the forks or attachments to ensure the stability and security of the load			
	1.4	Explain factors that can affect the stability of the forklift truck when engaged in unloading the container, vehicle, vessel or craft			
	1.5	Explain how the container, vehicle, vessel or craft should be prepared for loading			
	1.6	Explain the dangers of overloading the forklift truck			
	1.7	Identify the person responsible for receiving the load			

Learning outcomes	Assessment criteria		Evidence type	Portfolio reference	Date
	1.8	Identify problems that can occur when unloading a container, vehicle, vessel or craft using a forklift truck			
	1.9	Explain the appropriate action to take, in order to deal with identified problems			
2 Be able to unload the container, vehicle, vessel or craft using a forklift truck	2.1	Follow all organisational policies and procedures for unloading the container, vehicle, vessel or craft using the forklift truck that relate to: • health, safety and security • personal protective equipment • legal requirements • forklift operating systems • different locations • different containers, vehicles, vessels or craft • different loads • proof of delivery systems			
	2.2	Identify the correct container, vehicle, vessel or craft to be unloaded			
	2.3	Identify the correct load			
	2.4	Check the load is safe for the operation			
	2.5	Set forks and/or attachments to ensure the stability of the load			
	2.6	Communicate effectively			

Learning outcomes	Assessment criteria		Evidence type	Portfolio reference	Date
	2.7	Maintain the safety, security of yourself, the forklift truck and others when manoeuvring the forklift truck			
	2.8	Unload the container, vehicle, vessel or craft according to the plan and in the appropriate manner for the type of load			
	2.9	Check the stability and security of the load during the unloading of the container, vehicle, vessel or craft			
	2.10	Operate the forklift truck controls to maintain the safety, security of yourself, the forklift truck and others			
	2.11	Check that the safety and security of the load is maintained during the unloading			
	2.12	Set the load down safely in the correct position and location			
	2.13	Record all work according to organisational requirements			

Learner name: _____   Date: _____

Learner signature: _____   Date: _____

Assessor signature: _____   Date: _____

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

Unit 7:   Obtain Information on the Collection and/or Delivery of Goods

Unit reference number:	A/601/9451
Level:	2
Credit value:	2
Guided learning hours:	10

Unit summary

This unit is about a driver's responsibility in relation to the load they are carrying and the requirements relating to the collection and delivery of loads. The unit covers what a driver needs to do to make sure that their vehicle is suitable for the load to be carried and the documentation that they need to complete to comply with legal and organisational requirements during each driving duty. This unit is relevant to drivers of goods vehicles or those who are responsible for goods vehicles within logistics organisations.

Assessment methodology

Evidence of achievement for this unit should be drawn from the workplace except where Skills for Logistics makes provision for evidence to be produced through simulation, as specified in the Skills for Logistics overarching assessment guidance.

An assessment record must be created that identifies the assessment criteria that have been met and cross-references these to the evidence provided. The assessment record should include details of the type of evidence and the date of assessment.

The unit specification or suitable centre documentation could be used to form an assessment record.

Please note that the title for this unit suggests that there are different evidence requirements for the 'collection' and 'delivery' of goods and that learners may gather evidence for any of these. This is a reflection of the transportation of goods within the work environment. The evidence to achieve the assessment standard is the same for collection and delivery so there is no choice for the learner.

Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria		Evidence type	Portfolio reference	Date
1 Know how to obtain information on the collection and/or delivery of loads	1.1	Explain the relevant organisational policies and procedures, in relation to obtaining information on the collection and/or delivery of the load, that relate to: • health, safety and security • legal requirements • operating requirements • monitoring requirements			
	1.2	Explain the required information on the load to include: • the type of information for the load • where the information can be found • destination and schedule and any recent information that could affect the destination and schedule • requirements for loading and unloading • requirements for collections			
	1.3	Identify problems that can occur when obtaining information on the collection and/or delivery of loads			
	1.4	Explain the appropriate action to take in order to deal with identified problems			

Learning outcomes	Assessment criteria		Evidence type	Portfolio reference	Date
2 Be able to obtain information on the collection and/or delivery of loads	2.1	Follow all organisational policies and procedures, in relation to obtaining information on the collection and/or delivery of the load, that relate to: • health, safety and security • legal requirements • operating requirements • monitoring requirements			
	2.2	Collect information on the load to include: • the details of the load • destination and schedule • requirements for loading and unloading • requirements for collections and/or deliveries			
	2.3	Assess any relevant information that could affect the destination and schedule			
	2.4	Communicate effectively with others in relation to the collection and/or delivery of the load			
	2.5	Assess the suitability of the vehicle for the load			

Learner name: _____   Date: _____

Learner signature: _____   Date: _____

Assessor signature: _____   Date: _____

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

Unit 8:   Make an Effective Contribution to a Business in the Logistics Sector

Unit reference number:	Y/601/9456
Level:	2
Credit value:	3
Guided learning hours:	10

Unit summary

This unit is about understanding the organisation's aims and procedures and covers identifying individual and group targets, requirements and responsibilities. It is about helping colleagues and knowing how to communicate with others. The unit requires those working in the logistics sector to be aware of how they can improve their own performance. This unit is relevant to all those working in the logistics sector either individually or as part of a team.

Assessment methodology

Evidence of achievement for this unit should be drawn from the workplace except where Skills for Logistics makes provision for evidence to be produced through simulation, as specified in the Skills for Logistics overarching assessment guidance.

An assessment record must be created that identifies the assessment criteria that have been met and cross-references these to the evidence provided. The assessment record should include details of the type of evidence and the date of assessment.

The unit specification or suitable centre documentation could be used to form an assessment record.

Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Know how to make an effective contribution to a business in the logistics sector	1.1 Explain the relevant organisational policies and procedures, in relation to making an effective contribution to a business in the logistics sector, that relate to: • health, safety and security • personal protective equipment • your work role • quality standards			
	1.2 Identify own reporting line and the work roles of colleagues			
	1.3 Describe methods for improving personal work performance			
	1.4 Describe methods for identifying learning needs			
	1.5 Explain the importance of supporting colleagues and the difference it makes to productivity			
	1.6 Describe how misunderstandings and conflict in working relationships may be resolved constructively			

Learning outcomes	Assessment criteria		Evidence type	Portfolio reference	Date
2 Be able to make an effective contribution to a business in the logistics sector	2.1	Follow all organisational policies and procedures, in relation to making an effective contribution to a business in the logistics sector, that relate to: • health, safety and security • personal protective clothing • own work role • quality standards			
	2.2	Communicate effectively with others			
	2.3	Confirm tasks, priorities and responsibilities with an appropriate person			
	2.4	Perform work tasks in ways that are consistent with good practice in the organisation			
	2.5	Ensure that: • personal appearance and hygiene • equipment • work area are maintained in accordance with organisational requirements			
	2.6	Identify own learning needs from feedback obtained from appropriate people			
	2.7	Agree a learning plan that is realistic, with an appropriate person			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	2.8 Promptly action requests from others that fall within own responsibility			

Learner name: _____   Date: _____

Learner signature: _____   Date: _____

Assessor signature: _____   Date: _____

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

Unit 9:

Contribute to the Provision of Customer Service in Logistics Operations

Unit reference number:	Y/601/7920
Level:	2
Credit value:	3
Guided learning hours:	18

Unit summary

This unit is about creating and maintaining customer satisfaction and developing relationships through effective communication. It includes understanding business and customer confidentiality, the organisation's image and the limits of own authority when dealing with customers. This unit is relevant to those who work in the logistics sector individually and as part of a team.

Assessment methodology

Evidence of achievement for this unit should be drawn from the workplace except where Skills for Logistics makes provision for evidence to be produced through simulation, as specified in the Skills for Logistics overarching assessment guidance.

An assessment record must be created that identifies the assessment criteria that have been met and cross-references these to the evidence provided. The assessment record should include details of the type of evidence and the date of assessment.

The unit specification or suitable centre documentation could be used to form an assessment record.

Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Know how to contribute to the provision of customer services in logistics operations	1.1 Explain the relevant organisational policies and procedures, in relation to the provision of customer services in logistics operations, that relate to: • health, safety and security • personal protective equipment • maintaining effective customer relations • personal appearance and hygiene • reporting procedures and systems • recording information • confidentiality • complaints			
	1.2 Describe different types of customers in relation to own organisation			
	1.3 Describe the importance of: • promoting the organisation's image positively • effective communication • good customer service			
	1.4 Identify the services available to customers in own organisation			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	1.5 Describe the implications of: • a negative image on your organisation • poor communication • poor customer service			
	1.6 Describe: • own role in dealing with customer complaints and • the limits of your responsibility			
	1.7 Identify who to report to when you are unable to deal with a customer enquiry or request			
2 Be able to contribute to the provision of customer services in logistics operations	2.1 Follow all organisational policies and procedures, in relation to contributing to customer services in logistics operations, that relate to: • health, safety and security • personal protective equipment • maintaining effective customer relations • personal appearance and hygiene • reporting procedures and systems • recording information • confidentiality • complaints			
	2.2 Develop positive relationships with customers			

Learning outcomes	Assessment criteria		Evidence type	Portfolio reference	Date
	2.3	Ensure that own personal appearance and hygiene meet			
	2.4	Communicate effectively with customers			
	2.5	Ensure that all information available is up-to-date and accurate			
	2.6	Identify customer needs			
	2.7	Deal effectively with customer enquiries			
	2.8	Ensure the customer is promptly informed of any action that is taken			
	2.9	Maintain customer confidentiality			
	2.10	Update customer records accurately			
	2.11	Record customer enquiries and outcomes accurately using the organisation's procedures and systems.			
	2.12	Deal with customer complaints effectively			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

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

Unit 10:   Health, Safety and Security at Work

Unit reference number:	K/502/1072
Level:	2
Credit value:	3
Guided learning hours:	20

Unit summary

This unit is for those who take responsibility for their own health, safety and security in the workplace, and monitor the workplace for hazards. The job role involves contributing to safety and security in the workplace, taking action in the event of an incident, raising the alarm, following correct procedures for shutdown and evacuation, using emergency equipment correctly and safely, and monitoring the workplace for hazards.

Assessment methodology

Evidence of achievement for this unit should be drawn from the workplace except where Skills for Logistics makes provision for evidence to be produced through simulation, as specified in the Skills for Logistics overarching assessment guidance.

An assessment record must be created that identifies the assessment criteria that have been met and cross-references these to the evidence provided. The assessment record should include details of the type of evidence and the date of assessment.

The unit specification or suitable centre documentation could be used to form an assessment record.

Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria		Evidence type	Portfolio reference	Date
1 Be able to work safely	1.1	Take appropriate action in the event of fire, emergencies or accidents			
	1.2	Identify where alarms, emergency exits, escape routes, emergency equipment and assembly points are located			
	1.3	Demonstrate safe and appropriate use of emergency equipment			
	1.4	Distinguish between different alarm sounds			
	1.5	Comply with equipment operating procedures and manufacturers' instructions			
	1.6	Demonstrate safe handling and lifting techniques			
	1.7	Demonstrate correct use and maintenance of any protective clothing and/or equipment			
	1.8	Comply with personal responsibilities under the Health and Safety at Work Act/COSHH			
	1.9	Identify who the nominated first aiders are			

Learning outcomes	Assessment criteria		Evidence type	Portfolio reference	Date
2 Be able to monitor the workplace for hazards	2.1	Identify hazardous substances that are used in the workplace and demonstrate methods of making them safe or reducing their danger in the event of an accident			
	2.2	Identify hazards posed by machinery that is used in the workplace and demonstrate methods of making safe or reducing their danger in the event of an accident			
	2.3	Demonstrate how to handle and store hazardous substances including debris			
	2.4	Demonstrate how to store materials and equipment			
	2.5	Explain what the most likely accidents and emergencies in the workplace are and how to deal with them			
	2.6	Comply with personal responsibilities under the COSHH (Control of Substances Hazardous to Health)			
3 Be able to contribute to workplace security	3.1	Outline and comply with the organisation's rules, codes, guidelines and standards relating to security			
	3.2	Explain how to deal with loss of property			

Learner name: _____   Date: _____

Learner signature: _____   Date: _____

Assessor signature: _____   Date: _____

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

Unit 11: Keep Work Areas Clean in Logistics Operations

Unit reference number:	F/601/7913
Level:	2
Credit value:	3
Guided learning hours:	10

Unit summary

This unit is about keeping the workplace clean and tidy and maintaining appropriate or required hygiene standards. This unit is aimed at operatives in logistics operations who could be working in, for example, warehousing and storage, transport or freight forwarding.

Assessment methodology

Evidence of achievement for this unit should be drawn from the workplace except where Skills for Logistics makes provision for evidence to be produced through simulation, as specified in the Skills for Logistics overarching assessment guidance.

An assessment record must be created that identifies the assessment criteria that have been met and cross-references these to the evidence provided. The assessment record should include details of the type of evidence and the date of assessment.

The unit specification or suitable centre documentation could be used to form an assessment record.

Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria		Evidence type	Portfolio reference	Date
1 Know the requirements relating to the cleaning of work areas in logistics operations	1.1	Explain the relevant organisational policies and procedures for cleaning work areas in logistics operations, that relate to: • health, safety and security • environmental factors • legal requirements • operating requirements • personal protective equipment • personal health and hygiene standards • replenishment • waste disposal			
	1.2	Describe different procedures to maintain cleanliness in different work areas			
	1.3	Explain the importance of keeping the workplace clean and tidy for health and safety purposes			
	1.4	Identify problems that can occur when maintaining the cleanliness of work areas			
	1.5	Explain appropriate action when dealing with the identified problems			

Learning outcomes	Assessment criteria		Evidence type	Portfolio reference	Date
2 Be able to carry out correct cleaning procedures in logistics operations	2.1	Use Personal Protective Equipment correctly			
	2.2	Clean the work area thoroughly using the correct cleaning materials			
	2.3	Protect people in the work area from cleaning hazards during the cleaning process			
	2.4	Use the correct signage during the cleaning process			
	2.5	Follow operational procedures to ensure that other people are not inconvenienced during the cleaning process			
3 Be able to follow post-cleaning procedures in logistics operations	3.1	Dispose of any waste in accordance with organisational procedures			
	3.2	Ensure any unused cleaning materials are stored correctly according to manufacturers' instructions			
	3.3	Replenish used materials			

Learner name: _____   Date: _____

Learner signature: _____   Date: _____

Assessor signature: _____   Date: _____

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

Unit 12: Maintain Hygiene Standards in Handling and Storing Goods in Logistics Operations

Unit reference number:	L/601/7929
Level:	2
Credit value:	3
Guided learning hours:	16

Unit summary

This unit is about maintaining hygiene standards. It deals with personal hygiene standards and the use of appropriate clothing to protect the operative, goods or both. This unit is aimed at operatives in logistics operations who could be working in, for example, warehousing and storage, transport or freight forwarding.

Assessment methodology

Evidence of achievement for this unit should be drawn from the workplace except where Skills for Logistics makes provision for evidence to be produced through simulation, as specified in the Skills for Logistics overarching assessment guidance.

An assessment record must be created that identifies the assessment criteria that have been met and cross-references these to the evidence provided. The assessment record should include details of the type of evidence and the date of assessment.

The unit specification or suitable centre documentation could be used to form an assessment record.

Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria		Evidence type	Portfolio reference	Date
1 Know how to maintain hygiene standards when handling and storing goods in logistics operations	1.1	Explain the relevant organisational policies and procedures for maintaining hygiene standards in handling and storing goods in logistics operations, that relate to: • health, safety and security • protective clothing • personal hygiene • environmental factors • special requirements • waste disposal			
	1.2	Identify problems that can occur when maintaining hygiene standards when handling and storing goods			
	1.3	Explain appropriate action when dealing with identified problems			
2 Be able to maintain standards of hygiene when handling and storing goods in logistics operations	2.1	Maintain standards of personal hygiene required for the handling and storage of goods in specific storage environments			
	2.2	Use the correct protective clothing in relation to the goods and the storage environment			
	2.3	Apply the hygiene standards required to maintain the quality and condition of the goods and the storage environment			

Learning outcomes	Assessment criteria		Evidence type	Portfolio reference	Date
	2.4	Handle the goods using the correct handling methods and equipment			
	2.5	Dispose of waste in accordance with organisational policies and procedures			

Learner name: _____   Date: _____

Learner signature: _____   Date: _____

Assessor signature: _____   Date: _____

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

Unit 13: Principles of Food Safety in Logistics

Unit reference number:	H/600/6578
Level:	2
Credit value:	1
Guided learning hours:	9

Unit summary

This unit covers the basic principles of food hygiene for drivers and warehouse staff working in the logistics sector. Holders of qualifications including this unit will have a knowledge and understanding of the importance of food hygiene, associated food hazards, good hygiene practice and controls based on an awareness of food safety management systems.

Assessment methodology

Evidence of achievement for this unit should be drawn from the workplace except where Skills for Logistics makes provision for evidence to be produced through simulation, as specified in the Skills for Logistics overarching assessment guidance.

An assessment record must be created that identifies the assessment criteria that have been met and cross-references these to the evidence provided. The assessment record should include details of the type of evidence and the date of assessment.

The unit specification or suitable centre documentation could be used to form an assessment record.

Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria		Evidence type	Portfolio reference	Date
1 Understand how individuals must take responsibility for food safety	1.1	Outline the roles and responsibilities in an organisation's food safety procedures			
	1.2	Describe how to report and record food safety hazards and illnesses			
	1.3	Outline the legal responsibilities of drivers and warehouse staff with regard to keeping food safe			
2 Understand how to keep him/herself clean and hygienic	2.1	Explain the importance of personal hygiene in contributing to overall food safety			
	2.2	Describe effective personal hygiene practices, for example, protective clothing, hand washing, personal illnesses, cuts and wounds and avoiding unsafe behaviour			
3 Understand how to keep storage areas and vehicles clean	3.1	Explain how to keep storage areas and vehicles clean and tidy through the effective use of cleaning methods and equipment			
	3.2	State how to use and store chemicals safely to avoid contamination			
	3.3	Outline the importance of pest control			

Learning outcomes	Assessment criteria		Evidence type	Portfolio reference	Date
4 Understand how to keep food safe	4.1	State the risks to food and food packaging in transit, storage and at delivery from microbial, chemical, physical and allergenic hazards			
	4.2	Describe food safety procedures for delivery, storage, date marking and stock rotation			
	4.3	Explain the importance of food and environmental temperature controls			
	4.4	State why accurate records should be kept of food that is delivered or returned			
	4.5	State the reasons why food may be returned			
	4.6	State the controls to needed to maintain food safety in the event of controls not being met			
	4.7	State the corrective actions that are required to reduce the risk of food contamination when controls are not met			

Unit 14: Moving and/or Handling Goods in Logistics Operations

Unit reference number:	J/601/7914
Level:	2
Credit value:	4
Guided learning hours:	15

Unit summary

This unit is about the movement and/or handling of goods within a single location or between different locations. It deals with identifying hazards that might occur in moving or handling goods safely. This unit is aimed at operatives in logistics operations who could be working in, for example, warehousing and storage, transport or freight forwarding.

Assessment methodology

Evidence of achievement for this unit should be drawn from the workplace except where Skills for Logistics makes provision for evidence to be produced through simulation, as specified in the Skills for Logistics overarching assessment guidance.

An assessment record must be created that identifies the assessment criteria that have been met and cross-references these to the evidence provided. The assessment record should include details of the type of evidence and the date of assessment.

The unit specification or suitable centre documentation could be used to form an assessment record.

Please note that the title for this unit suggests that there are different evidence requirements for 'handling' or 'moving' goods in logistics operations and that learners may gather evidence for either of these actions. This is a reflection of the different way in which learners may deal with goods within the work environment. The evidence to achieve the assessment standard is the same for handling and moving and so there is no choice for the learner.

Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Know how to move and/or handle goods in logistics operations	1.1 Explain the relevant organisational policies and procedures for moving and/or handling goods in logistics operations that relate to: • health safety and security • environmental factors • special requirements • legal requirements • operating requirements • personal protective equipment			
	1.2 Identify any specific hazards in relation to moving and/or handling the goods			
	1.3 Describe methods for moving and/or handling the goods safely			
	1.4 Explain circumstances when assistance is required to move and/or handle the goods and how this assistance is applied			
	1.5 Identify problems that can occur when moving and/or handling the goods			
	1.6 Explain appropriate action when dealing with identified problems			

Learning outcomes	Assessment criteria		Evidence type	Portfolio reference	Date
2 Be able to move and/or handle the goods in logistics operations	2.1	Identify the goods to be moved and/or handled			
	2.2	Use suitable handling methods to move the goods safely and correctly			
	2.3	Position and set down the goods in the required location			
	2.4	Place the goods so that they can be easily identified and accessed			

Learner name: _____   Date: _____

Learner signature: _____   Date: _____

Assessor signature: _____   Date: _____

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

Unit 15:

Sort Goods and Materials for Recycling or Disposal in Logistics Operations

Unit reference number:	R/601/7933
Level:	2
Credit value:	3
Guided learning hours:	10

Unit summary

This unit is about the recycling or disposal of goods and materials. It deals with identifying which goods and materials are suitable for recycling or disposal, preparing the goods and materials for onward movement and dealing with any problems that may occur when sorting goods and materials for recycling or disposal. This unit is aimed at operatives in logistics operations who could be working in, for example, warehousing and storage, transport or freight forwarding.

Assessment methodology

Evidence of achievement for this unit should be drawn from the workplace except where Skills for Logistics makes provision for evidence to be produced through simulation, as specified in the Skills for Logistics overarching assessment guidance.

An assessment record must be created that identifies the assessment criteria that have been met and cross-references these to the evidence provided. The assessment record should include details of the type of evidence and the date of assessment.

The unit specification or suitable centre documentation could be used to form an assessment record.

Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria		Evidence type	Portfolio reference	Date
1 Know how to sort goods and materials for recycling or disposal in logistics operations	1.1	Explain the relevant organisational policies and procedures for sorting goods and materials for recycling and disposal in logistics operations, that relate to: • health, safety and security • personal protective equipment • environmental factors • special requirements • waste management • roles and responsibilities of colleagues			
	1.2	Explain the types of goods and materials that are suitable for recycling and those that are not			
	1.3	Identify problems that can occur when sorting goods for recycling or disposal			
	1.4	Explain appropriate action when dealing with identified problems			
2 Be able to sort the goods and materials for recycling or disposal in logistics operations	2.1	Undertake initial checks to determine the suitability of the goods and materials for recycling or disposal			
	2.2	Sort the goods and materials correctly			
	2.3	Remove any parts of the goods and materials that are not suitable for recycling and dispose of them correctly			

Learning outcomes	Assessment criteria		Evidence type	Portfolio reference	Date
	2.4	Handle the goods and materials using the correct handling methods and equipment			
	2.5	Position the goods or materials suitable for recycling or disposal into the correct locations			
	2.6	Prepare the goods or materials for further processing according to the organisation's specifications for recycling or disposal			

Learner name: _____   Date: _____

Learner signature: _____   Date: _____

Assessor signature: _____   Date: _____

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

Unit 16:   Wrap and Pack Goods in Logistics Operations

Unit reference number:	Y/601/7917
Level:	2
Credit value:	3
Guided learning hours:	12

Unit summary

This unit is about wrapping and packing goods as part of the logistics operation. It deals with identifying goods and the correct methods and materials for wrapping and packing to safeguard the goods during transportation or storage. It deals with labelling goods and the disposal of any waste materials generated during wrapping and packing activities. This unit is aimed at operatives in logistics operations who could be working in, for example, warehousing and storage, transport or freight forwarding.

Assessment methodology

Evidence of achievement for this unit should be drawn from the workplace except where Skills for Logistics makes provision for evidence to be produced through simulation, as specified in the Skills for Logistics overarching assessment guidance.

An assessment record must be created that identifies the assessment criteria that have been met and cross-references these to the evidence provided. The assessment record should include details of the type of evidence and the date of assessment.

The unit specification or suitable centre documentation could be used to form an assessment record.

Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria		Evidence type	Portfolio reference	Date
1 Know how to prepare the goods for wrapping and packing in logistics operations	1.1	Explain the relevant organisational policies and procedures for packing the goods in logistics operations that relate to: • health, safety and security requirements • environmental factors • special requirements • personal protective equipment • waste minimisation and disposal			
	1.2	Describe the types of wrapping and packing materials to be used for packing the goods			
	1.3	Describe the tools and equipment to be used for packing the goods			
	1.4	Describe the roles and responsibilities of colleagues in relation to packing the goods			
	1.5	Identify problems that can occur when wrapping and packing the goods			
	1.6	Explain appropriate action when dealing with identified problems			

Learning outcomes	Assessment criteria		Evidence type	Portfolio reference	Date
2 Be able to wrap and pack the goods in logistics operations	2.1	Check that the goods being packed match the specifications provided in the information			
	2.2	Comply with all health, safety and security issues relating to wrapping and packing the goods			
	2.3	Schedule the packing of the goods according to agreed work instructions			
	2.4	Protect goods from damage while they are being packed			
	2.5	Use the appropriate tools and equipment safely in accordance with organisational procedures			
	2.6	Pack, wrap and seal goods using the correct type and quantity of packing materials			
	2.7	Minimise waste			
	2.8	Label the packages with the correct information for further use			
	2.9	Dispose of waste materials correctly and promptly			

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, BTEC and Pearson Work Based Learning contact details: qualifications.pearson.com/en/support/contact-us.html

- books, software and online resources for UK schools and colleges: www.pearsonschoolsandfecolleges.co.uk

Key publications

- *Adjustments for candidates with disabilities and learning difficulties, Access and Arrangements and Reasonable Adjustments, General and Vocational qualifications* (Joint Council for Qualifications (JCQ))

- *Supplementary guidance for reasonable adjustments and special consideration in vocational internally assessed units* (Pearson)

- *General and Vocational qualifications, Suspected Malpractice in Examination and Assessments: Policies and Procedures* (JCQ)

- *Equality Policy* (Pearson)

- *Recognition of Prior Learning Policy and Process* (Pearson)

- *UK Information Manual* (Pearson)

- *Pearson Edexcel NVQs, SVQs and competence-based qualifications – Delivery Requirements and Quality Assurance Guidance* (Pearson)

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

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

13 Professional development and training

Professional development and training

Pearson supports customers with training related to our qualifications. This support is available through a choice of training options offered on our website.

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. 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: qualifications.pearson.com/en/support/contact-us.html

Online support: find the answers to your questions in *Knowledge Base*, a searchable database of FAQs and useful videos that we have put together with the help of our subject advisors to support you in your role. Whether you are a teacher, administrator, Assessment Associate (AA) or training provider, you will find answers to your questions. If you are unable to find the information you need please send us your query and our qualification or administrative experts will get back to you.

14 Contact us

We have a dedicated Account Support team, based throughout the UK, to give you more personalised support and advice. To contact your Account Specialist you can use any of the following methods:

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 at:

Email: wbl@pearson.com
Telephone: 0844 576 0045

Complaints and feedback

We are working hard to provide you with 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.

Skills for Logistics

Assessment Guidance for the Qualifications and Credit Framework

March 2011

Assessment Guidance for the Qualifications and Credit Framework

1 Introduction

This document is for those Awarding Organisations that intend to offer QCF qualifications based on Skills for Logistics National Occupational Standards. It is a tool that can be used in conjunction with any unit whose purpose is to confirm occupational competence. Such units are designed and informed by the views of logistics employers to meet the needs of the UK economy. They are designed to prepare candidates for further learning or training, or update their existing knowledge and skills, or their continuing professional development. Skills for Logistics aim to develop and implement combined units of assessment, based on relevant National Occupational Standards (NOS), which are fit for purpose and maintain quality assured approaches to assessment and verification.

This guidance for assessment should be used by Awarding Organisations to ensure that 'competence' units are assessed in accordance with the needs of employers and stakeholders in the sector. The intention of this guidance is to minimise bureaucracy whilst maintaining integrity and quality assurance of assessment and verification of achievement.

This document applies to all qualifications in the Qualifications Credit Framework (QCF) from the 1st October 2010 and that fall within the Skills for Logistics sector. It replaces any other assessment strategies and guidance currently in use.

QCF qualifications are not currently used as a 'Licence to Practice' in the Logistics Sector, they are however recognised and supported by employers and stakeholders in the sector.

2   Definitions

Certain terms used in this document have particular meanings and that should be taken in context within the assessment guidance:

- to assess: to evaluate in a detailed and analytical way.*

- to verify: to demonstrate that something is true, accurate or justified*

- competence: the proven/demonstrated and individual –capacity to use know-how, skills, knowledge in order to meet usual and changing occupational requirements.*

*reference Oxford English Dictionary

Skills for Logistics consider the combination of skills and knowledge to be fundamental to the furthering of the skills agenda as outlined in the White Paper; *'Skills for Growth – the national skills strategy'* BIS November 2009.

Competence for a particular job role is likely to include the generic skills required for that occupation, specialised skills for a particular supply chain and employability skills such as team working, creative thinking, communication and customer care. The inclusion of such skills in a qualification creates a more holistic approach to developing the skills required for the needs of the UK economy.

3   External Quality Control

External quality control is achieved through rigorous monitoring and standardisation of assessment decisions; Awarding Organisations achieve this by operating within their existing systems for quality monitoring, risk assessment, and management of their approved centres following guidance issued by the Regulatory Authorities.

4   Additional Assessment Needs

QCF units that are used to assess competence within the QCF need to be assessed and quality assured in accordance with the following additional requirements:

1   When QCF units are used to assess competence, Awarding Organisations (AO's) are required to make sure their recognised assessment centres assess learners according to the NOS issued by the SSC for learning and development

2   Learners should be enabled to complete, wherever possible, real work activities that provide both evidence of underpinning knowledge and evidence of competence to demonstrate they have met the learning outcomes and assessment criteria of the QCF unit and that they are competent in relation to the NOS

3   When a Learner is unable to complete real work activities simulation is permitted, circumstances in which simulation may take place are:

- a learner is required to complete a work activity that does not occur on a regular basis and therefore opportunities to complete a particular work activity do not easily arise,

- a learner is required to respond to a situation that rarely occurs, such as responding to an emergency situation,

- the safety of the learner and/or resources would be put at risk

4   When simulation is used, those who assess the learner should be confident that the simulation replicates the workplace to such an extent that learner's will be able to fully transfer their occupational competence to the workplace and real situations.

5   Assessors must be occupationally competent in the occupational area they are assessing where they have sufficient and relevant technical/occupational competence in the unit, at or above the level of the unit being assessed

6   Assessors and Internal Verifiers must hold or be working towards the appropriate regulatory body approved qualifications for assessment and internal verification, such as those developed by Lifelong Learning UK.

7   Assessors must be fully conversant with the units against which the assessments and verifications are to be undertaken

8   Assessors must carry out assessment according to the relevant Learning and Development National Occupational Standards *(approved January 2010)**

9   All assessment decisions made by those working towards a relevant assessor qualification must be verified by a qualified Teacher/Trainer, Assessor or an Assessor recognised by the Awarding Organisation as appropriate

10 Trainee Assessors should have a plan, which is overseen by the relevant assessment centre, to achieve the relevant assessor qualification within an agreed timescale

5 Quality Assurance Requirements

This section summarises the quality assurance requirements that apply to QCF units and qualifications used to demonstrate competence. Awarding Organisations should ensure that recognised assessment centres are familiar with these requirements.

1   QCF units that are used to assess competence must be verified:

- internally by an Internal Verifier who is accountable to the assessment centre

- externally by an External Verifier who is accountable to the Awarding Organisation

2   Internal Verifiers must:

- hold or be working towards a suitable Internal Verifier qualification such as one based on LLUK standards

- have sufficient and relevant technical/occupational familiarity with the units that are verified

- be fully conversant with the standards and assessment criteria in the units to be assessed

- understand the Awarding Organisation's quality assurance systems and requirements for this qualification

3   Trainee Internal Verifiers must have:

- a plan that is overseen by the recognised assessment centre, to achieve an appropriate Internal Verifier qualification within an agreed timescale

4   External Verifiers must:

- hold or be working towards a suitable External Verifier qualification such as one based on LLUK standards

- have sufficient and relevant technical/occupational familiarity with the units that are externally verified

- be fully conversant with the standards and assessment criteria in the units to be assessed

- understand the Awarding Organisation's quality assurance systems and requirements for this qualification

5   Trainee External Verifiers should have:

- a plan that is overseen by the recognised assessment centre, to achieve an appropriate External Verifier qualification within an agreed timescale

6   Skills for Logistics recognise that employers in the sector provide in-house training, development and assessment processes that can meet the standards set for Assessors and Verifiers. Where an employer maps its in-house training, development and assessment processes against the Assessor and Verifier National Occupational Standards and shows that all are met; subject to agreement with the Awarding Organisation and Skills for Logistics, an employer is permitted to carry out Assessment and Verification using staff members who do not hold Assessor and Verifier qualifications. Such individuals must however, meet all other requirements for Assessors and Verifiers.

6 External Monitoring/Risk Management

Awarding Organisations should decide the frequency of external monitoring activities, which should be based on the risks associated with a qualification of this type and an assessment of the centre's performance and past record.

Awarding Organisations should develop suitable auditing processes, where naturally occurring quality assurance already exist in the workplace assessment environments.

7 Equality and Diversity

Awarding Organisations and their assessment centre staff must ensure no learner is discriminated against, either directly or indirectly on the grounds of: race, colour, ethnicity, nationality, ethnicity, sex, marital status, gender reassignment, sexual orientation, disability, social status, belief or non-belief, language with the exception of the Welsh language and the legal requirements of the Welsh Language Act.