

Specification

BTEC Short Courses

Edexcel Level 2 BTEC Certificate in Warehousing and Storage Principles (QCF)

For first teaching November 2009

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What are BTEC Level 1-3 Short Course qualifications?

BTEC QCF Level 1-3 short course qualifications are designed to provide specialist work-related qualifications in a range of sectors. They give learners the knowledge, understanding and skills that they need to prepare for employment. The qualifications also provide career development opportunities for those already in work. Consequently they provide a course of study for full-time or part-time learners in schools, colleges and training centres.

BTEC short courses also provide much of the underpinning knowledge and understanding for the National Occupational Standards for the sector, where these are appropriate. They are supported by the relevant Standards Setting Body (SSB) or Sector Skills Council (SSC).

On successful completion of a BTEC short course qualification, learners can progress to, or within, employment and/or continue their study in the same, or related, vocational area.

Edexcel BTEC Level 2 Certificate in Warehousing and Storage Principles (QCF) (14 credits)

The 14-credit Edexcel BTEC Level 2 Certificate in Warehousing and Storage Principles (QCF) offers an engaging programme for those who are clear about the vocational area that they wish to learn more about. These learners may wish to extend their programme through the study of a related GCSE, a complementary NVQ or other related vocational or personal and social development qualification. These learning programmes can be developed to allow learners to study complementary qualifications without duplication of content.

For adult learners, the Edexcel BTEC Level 2 Certificate (QCF) can extend their knowledge and understanding of work in a particular sector. It is a suitable qualification for those wishing to change career or move into a particular area of employment following a career break.

Key features of the Edexcel BTEC Level 2 Certificate in Warehousing and Storage Principles (QCF)

The Edexcel BTEC Level 2 Certificate in Warehousing and Storage Principles (QCF) has been developed to give learners the opportunity to:

- engage in learning which is relevant to them and will provide opportunities to develop a range of skills and techniques, personal skills and attributes essential for successful performance in working life
- gain the knowledge, understanding and skills that learners need to work effectively in a warehousing and storage environment
- achieve a nationally recognised Level 2 vocationally related qualification
- progress to employment in a particular vocational sector
- progress to related general and/or vocational qualifications
- develop functional skills and personal learning and thinking skills.

National Occupational Standards (NOS)

Where relevant, Edexcel BTEC Level 2 (QCF) qualifications are designed to provide some of the underpinning knowledge and understanding for the National Occupational Studies (NOS), as well as developing practical skills in preparation for work and possible achievement of National Vocational Qualifications (NVQs) in due course. NOS form the basis of NVQs. Edexcel BTEC Level 2 (QCF) qualifications do not purport to deliver occupational competence in the sector, which should be demonstrated in a work context.

The unit in this specification identifies links to elements of the NOS.

The Edexcel BTEC Level 2 Certificate in Warehousing and Storage Principles (QCF) relates to the following NOS units:

Unit LOG1	Maintain health, safety, and security in logistics operations
Unit LOG3	Contribute to effective working relationships with colleagues in logistics operations
Unit LOG4	Develop effective working relationships with colleagues in logistics operations
Unit WS1	Keep equipment in good working order
Unit WS2	Keep stock at required levels
Unit WS3	Keep work areas clean
Unit WS4	Handle goods manually in logistics facilities
Unit WS5	Pick goods to assemble orders for dispatch
Unit WS6	Wrap and pack goods
Unit WS7	Provide customers with information and advice on goods and services
Unit WS8	Operate equipment to perform work requirements
Unit WS9	Move goods in logistics facilities
Unit WS10	Receive goods from deliveries
Unit WS11	Place goods in storage
Unit WS12	Maintain the safety and quality of goods
Unit WS13	Maintain the safety of hazardous goods and materials
Unit WS14	Maintain hygiene standards in handling and storing goods
Unit WS15	Process orders for dispatch to customers
Unit WS16	Assemble orders for dispatch
Unit WS17	Dispatch goods for delivery
Unit WS21	Audit stock levels and stock records

The Edexcel BTEC Level 2 Certificate in Warehousing and Storage Principles has been approved as a Technical Certificate for the Warehousing and Storage Modern Apprenticeship framework. A mapping of the links between this qualification and related NVQs, where aspects of the underpinning knowledge are covered in full, is provided at *Annexe C* on page 31. **For candidates who are also registered with Edexcel for their NVQ**, successful completion of this qualification will therefore provide sufficient evidence for the related underpinning knowledge of the appropriate NVQ units.

The mapping also indicates where partial coverage of underpinning knowledge is possible. Assessments will vary between centres, but can be designed to link clearly to this partial coverage and provide evidence for underpinning knowledge in related NVQ units. Centres are advised to confirm this source of evidence for the NVQs with their **NVQ external verifier**.

BTEC Short Courses at Levels 1-3

QCF level

3

Edexcel Level 3 BTEC Award...

Edexcel Level 3 BTEC Certificate...

Edexcel Level 3 BTEC Diploma...

2

Edexcel Level 2 BTEC Award...

Edexcel Level 2 BTEC Certificate...

Edexcel Level 2 BTEC Diploma...

1

Edexcel Level 1 BTEC Award...

Edexcel Level 1 BTEC Certificate...

Edexcel Level 1 BTEC Diploma...

Credit value

1 to 12

13 to 36

37 and above

Rules of combination

The rules of combination specify the credits that need to be achieved, through the completion of particular units, for the qualification to be awarded. All accredited qualifications within the QCF have a set rule of combination.

The rules of combination specify the:

- credit value of the qualification, which sets out the number of credits required at all levels to achieve the qualification
- credits to be achieved at the level of the qualification or above
- credits from mandatory units, where relevant
- credits from optional units, where relevant
- credits from other units
- credits from equivalent units
- exemptions
- time limits on the process of credit accumulation or exemptions.

Rules of combination for the Edexcel BTEC Level 2 (QCF) qualifications

It is the centre's responsibility to ensure that the following rules of combination are adhered to.

Edexcel BTEC Level 2 Certificate in Warehousing and Storage Principles (QCF)

- 1 Qualification credit value: a minimum of 14 credits.
- 2 Minimum credit to be achieved at, or above, the level of the qualification: 14 credits.
- 3 All credits must be achieved from the unit listed in this specification.

Edexcel BTEC Level 2 Certificate in Warehousing and Storage Principles

The Edexcel BTEC Level 2 Certificate in Warehousing and Storage Principles is a 14-credit and 110 guided learning hour (GLH) qualification that consists of one mandatory unit.

Edexcel BTEC Level 2 Certificate in Warehousing and Storage Principles			
Unit	Mandatory units	Credit	Level
1	Warehousing and Storage Principles	14	2

Assessment and grading

The assessment for the Edexcel BTEC Level 2 Certificate in Warehousing and Storage Principles is criterion referenced, based on the achievement of specified assessment criteria. Each unit contains contextualised pass criteria for unit assessment.

In the Edexcel BTEC Level 2 Certificate in Warehousing and Storage Principles all units are internally assessed. Centre assessment will be externally verified through the National Standards Sampling process.

The overall grading for the Edexcel BTEC Level 2 Certificate in Warehousing and Storage Principles is a pass, based upon the successful achievement of the minimum credit.

The purpose of assessment is to ensure that effective learning of the content of each unit has taken place.

Centres are encouraged to use a variety of assignments and assessment methods, including case studies and work-based assessments, along with projects, performance observation and time-constrained assessments. Practical application of the assessment criteria in a realistic scenario should be emphasised and maximum use made of practical work experience.

Assignments constructed for assessment by centres should be valid, reliable and fit for purpose, building on the application of the assessment criteria. Care must be taken to ensure that assignments used for assessment of a unit cover all the criteria for that unit as set out in the Assessment criteria grid section of that unit. It is advised that the criteria which an assignment is designed to cover should be clearly indicated in the assignment to: (a) provide a focus for learners (for transparency and to help ensure that feedback is specific to the criteria); and (b) assist with internal standardisation processes. Tasks and activities should enable learners to produce evidence that directly relates to the specified criteria.

The creation of assignments that are fit for purpose is vital to achievement by learners and their importance cannot be over emphasised.

Quality assurance

Edexcel's qualification specifications clearly set out the standard to be achieved by each learner in order to achieve the award of the qualification. This is given in the statement of outcomes and assessment criteria in the unit. Further guidance on assessment is given in the *Essential guidance for tutors* section of the unit.

Edexcel operates a quality assurance process, which is designed to ensure that these standards are maintained by all assessors and verifiers. It achieves this through the following activities.

Internal verification

Centres are required to have processes in place that ensure that each assessor's decisions are reviewed so that they are correctly interpreting and applying the standards set out in the specifications. Choice and application of an appropriate system is a matter for individual centres. Edexcel fully supports the use of the centre's own quality assurance systems where this ensures robust internal standardisation. Centres should refer to the *QCF BTEC Levels 2/3 including Short Courses Levels 1-3 Handbook* (updated annually).

External verification

Edexcel will sample assessors' decisions using subject-specialist external verifiers. This process will follow the National Standards Sampling (NSS) protocol as set out in the *QCF BTEC Levels 2/3 including Short Courses Levels 1-3 Handbook* (updated annually).

The external verifier assigned to the centre will identify, through negotiation with the programme coordinator, the unit (or units) which will be subject to NSS. Centres will be required to make available work produced by four learners which provides evidence for the assessment (in whole or in part) of the identified unit (or units). The assignment brief (or briefs) on which the work is based must have been internally verified. The learner work **must** have been internally assessed, and at least 50 per cent of it **must** have been internally verified.

Centres should refer to the *QCF BTEC Levels 2/3 including Short Courses Levels 1-3 Handbook* (updated annually).

Risk assessment

Edexcel has an approval process which creates a quality profile of each qualification programme in each centre and for the centre as a whole. This profile contributes to the determination of the nature of external verification activity for each programme and will also be used to initiate other quality control measures by Edexcel.

Approval

Where a centre already has approval for a programme that is being replaced by a new programme, the centre will be given 'accelerated approval' for the new programme. Other centres wishing to offer a programme in a vocational area for the first time will need to apply for approval to offer the programme.

Centres that have not previously offered any BTEC qualifications will first need to apply for, and be granted, centre approval.

When a centre applies for approval to offer a BTEC qualification they will be required to enter into an approvals contract.

The approvals contract is a formal commitment by the head or principal of a centre to meet all the requirements of the specification and linked codes or regulations. Sanctions and tariffs will be applied if centres do not comply with the contract. This could ultimately result in the suspension of certification or withdrawal of approval.

Programme design and delivery

Mode of delivery

Edexcel does not define the mode of delivery for Edexcel BTEC Level 2 (QCF) qualifications. Centres are free to offer the qualifications using any mode of delivery (such as full-time, part-time, evening only, distance learning) that meets their learners' needs. Whichever mode of delivery is used, centres must ensure that learners have appropriate access to the resources identified in the specification and to the subject specialists delivering the units. This is particularly important for learners studying for the qualification through open or distance learning.

Learners studying for the qualification on a part-time basis bring with them a wealth of experience that should be utilised to maximum effect by tutors and assessors. The use of assessment evidence drawn from learners' work environments should be encouraged. Those planning the programme should aim to enhance the vocational nature of the qualification by:

- liaising with employers to ensure a course relevant to learners' specific needs
- accessing and using non-confidential data and documents from learners' workplaces
- including sponsoring employers in the delivery of the programme and, where appropriate, in the assessment
- linking with company-based/workplace training programmes
- making full use of the variety of experience of work and life that learners bring to the programme.

Resources

Edexcel BTEC Level 2 (QCF) qualifications are designed to give learners an understanding of the skills needed for specific vocational sectors. Physical resources need to support the delivery of the programme and the assessment of the learning outcomes, and should therefore normally be of industry standard. Staff delivering programmes and conducting the assessments should be familiar with current practice and standards in the sector concerned. Centres will need to meet any specific resource requirements to gain approval from Edexcel.

Where specific resources are required these have been indicated in individual units in the *Essential resources* sections.

Delivery approach

It is important that centres develop an approach to teaching and learning that supports the vocational nature of Edexcel BTEC Level 2 (QCF) qualifications and the mode of delivery. Specifications give a balance of practical skill development and knowledge requirements, some of which can be theoretical in nature. Tutors and assessors need to ensure that appropriate links are made between theory and practical application and that the knowledge base is applied to the sector. This requires the development of relevant and up-to-date teaching materials that allow learners to apply their learning to actual events and activities within the sector. Maximum use should be made of the learners' experience.

As the qualification has been designated and approved as a Technical Certificate and forms part of a Modern Apprenticeship scheme, particular care needs to be taken to build strong links between the learning and assessment for this BTEC Award/Certificate/Diploma and the NVQs and key skills that also contribute to the scheme.

Additional and specialist learning

Additional and specialist learning (ASL) consists of accredited qualifications at the same level as, or one level above the Diploma course of study, which have been approved under Section 96 of the Learning and Skills Act 2000. The ASL may include BTEC qualifications which are also available to learners not following a Diploma course of study.

Qualifications for ASL must be selected from the ASL catalogue through the National Database of Accredited Qualifications (NDAQ). The catalogue includes qualifications which have the approval of the Diploma Development Partnership (DDP) and will expand over time as more qualifications are approved. To access the catalogue go to www.ndaq.org.uk and select 'Browse Diploma Qualifications'.

Further units may be added to qualifications within the catalogue and centres undertaking, or preparing to undertake, ASL should refer regularly to the Edexcel website for information regarding additions.

Functional Skills

Edexcel BTEC Level 2 (QCF) qualifications give learners opportunities to develop and apply Functional Skills. Functional Skills are also offered as stand-alone qualifications.

Access and recruitment

Edexcel'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 are required to recruit learners to BTEC qualifications with integrity. This will include ensuring that applicants have appropriate information and advice about the qualifications and that the qualification will meet their needs. Centres should take appropriate steps to assess each applicant's potential and make a professional judgement about their ability to successfully complete the programme of study and achieve the qualification. This assessment will need to take account of the support available to the learner within the centre during their programme of study and any specific support that might be necessary to allow the learner to access the assessment for the qualification. Centres should consult Edexcel's policy on learners with particular requirements.

Centres will need to review the entry profile of qualifications and/or experience held by applicants, considering whether this profile shows an ability to progress to a higher level qualification.

Restrictions on learner entry

This qualification is accredited on the QCF for learners aged 16 and over.

In particular sectors the restrictions on learner entry might also relate to any physical or legal barriers; for example, people working in health, care or education are likely to be subject to police checks.

Access arrangements and special considerations

Edexcel's policy on access arrangements and special considerations for BTEC and Edexcel NVQ qualifications aims to enhance access to the qualifications for learners with disabilities and other difficulties (as defined by the 1995 Disability Discrimination Act and the amendments to the Act) without compromising the assessment of skills, knowledge, understanding or competence.

Further details are given in the policy document *Access Arrangements and Special Considerations for BTEC and Edexcel NVQ Qualifications*, which can be found on the Edexcel website (www.edexcel.com). This policy replaces the previous Edexcel policy (*Assessment of Vocationally Related Qualifications: Regulations and Guidance Relating to Learners with Special Requirements, 2002*) concerning learners with particular requirements.

Recognition of Prior Learning

Recognition of Prior Learning (RPL) is a method of assessment (leading to the award of credit) that considers whether a learner can demonstrate that they can meet the assessment requirements for a unit through knowledge, understanding or skills they already possess and so do not need to develop through a course of learning.

Edexcel encourages centres to recognise learners' previous achievements and experiences whether at work, home and at leisure, as well as in the classroom. RPL provides a route for the recognition of the achievements resulting from continuous learning.

RPL enables recognition of achievement from a range of activities using any valid assessment methodology. Provided that the assessment requirements of a given unit or qualification have been met, the use of RPL is acceptable for accrediting a unit, units or a whole qualification. Evidence of learning must be sufficient, reliable and valid.

Unit format

All units in the Edexcel BTEC Level 2 (QCF) qualifications have a standard format. The unit format is designed to give guidance on the requirements of the qualification for learners, tutors, assessors and those responsible for monitoring national standards.

Each unit has the following sections.

Unit title

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

Unit code

This is the unit code provided on accreditation onto the QCF. This code is unique to the unit.

QCF level

All units and qualifications within the QCF will have a level assigned to them, which represents the level of achievement. There are nine levels of achievement, from Entry Level to Level 8. The level of the unit has been informed by the QCF level descriptors and, where appropriate, the NOS and/or other sector/professional benchmarks.

Credit value

All units have a credit value. The minimum credit value that may be determined for a unit is one, and credits can only be awarded in whole numbers. Learners will be awarded credits for the successful completion of whole units.

Unit aim

The aim provides a clear summary of the purpose of the unit and is a succinct statement that summarises the learning outcomes of the unit.

Unit introduction

The unit introduction gives the reader an appreciation of the unit in the vocational setting of the qualification, as well as highlighting the focus of the unit. It gives the reader a snapshot of the unit and the key knowledge, skills and understanding gained while studying the unit. The unit introduction also highlights any links to the appropriate vocational sector by describing how the unit relates to that sector.

Learning outcomes

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

Assessment criteria

The assessment criteria of a unit specify the standard a learner is expected to meet to demonstrate that a learning outcome, or set of learning outcomes, has been achieved. The learning outcomes and assessment criteria clearly articulate the learning achievement for which the credit will be awarded at the level assigned to the unit.

Unit content

The unit content identifies the breadth of knowledge, skills and understanding needed to design and deliver a programme of learning to achieve each of the learning outcomes. This is informed by the underpinning knowledge and understanding requirements of the related National Occupational Standards (NOS), where relevant. The content provides the range of subject material for the programme of learning and specifies the skills, knowledge and understanding required for achievement of the unit.

Each learning outcome is stated in full and then the key phrases or concepts related to that learning outcome are listed in italics followed by the subsequent range of related topics.

Relationship between content and assessment criteria

The learner should have the opportunity to cover all of the unit content.

It is not a requirement of the unit specification that all of the content is assessed. However, the indicative content will need to be covered in a programme of learning in order for learners to be able to meet the standard determined in the assessment criteria.

Content structure and terminology

The information below shows the unit content is structured and gives the terminology used to explain the different components within the content.

- **Learning outcome:** this is shown in bold at the beginning of each section of content
- *Italicised sub-heading:* it contains a key phrase or concept. This is content which must be covered in the delivery of the unit. Colons mark the end of an italicised sub-heading
- **Elements of content:** the elements are in plain text and amplify the sub-heading. The elements must be covered in the delivery of the unit. Semi-colons mark the end of an element
- **Brackets** contain amplification of content which must be covered in the delivery of the unit
- **'eg'** is a list of examples, used for indicative amplification of an element (that is, the content specified in this amplification could be covered or could be replaced by other, similar material).

Essential guidance for tutors

This section gives tutors additional guidance and amplification to aid understanding and a consistent level of delivery and assessment. It is divided into the following sections.

- *Delivery* – explains the content's relationship with the learning outcomes and offers guidance about possible approaches to delivery. This section is based on the more usual delivery modes but is not intended to rule out alternative approaches.
- *Assessment* – gives amplification about the nature and type of evidence that learners need to produce in order to achieve the unit. This section should be read in conjunction with the assessment criteria.

Unit 1: Warehousing and Storage Principles

Unit code: L/502/2764

QCF level: 2

Credit value: 14

Unit aim

The unit covers the theory required to undertake job roles within the warehousing or storage sector. There are five learning outcomes that cover the following areas: the receipt and storage of goods and materials; processing orders and dispatching goods; delivering customer service; health, safety, security and legislation and effective team working.

Unit introduction

The purpose of this unit is to provide and underpin the knowledge and understanding of those people whose job role is within logistics operations. Job roles could be in warehousing and storage, transport or freight forwarding. This unit is aimed at those people who already have some basic experience and understanding of logistics operations.

Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

On completion of this unit a learner should:

Learning outcomes	Assessment criteria
<p>1 Understand how to receive and store goods and materials</p>	<p>1.1 Explain the importance of knowing what goods are due and when they are due</p> <p>1.2 Explain the importance of correctly preparing the receiving area for the goods</p> <p>1.3 State the importance of checking the quality and quantity of the goods received</p> <p>1.4 Explain the purpose of an effective stock control system</p> <p>1.5 Explain the methods and conditions for storing goods</p> <p>1.6 Explain the importance of reporting and recording variations in deliveries or damage, breakages, quality or out of date items in storage</p> <p>1.7 State the Personal Protective Equipment used in a Warehouse and Storage environment</p>
<p>2 Understand how to process orders and dispatch goods</p>	<p>2.1 Explain how customer requirements translate into orders</p> <p>2.2 Identify the documents and systems that are used for checking availability of stock</p> <p>2.3 Explain the importance of completing the order process accurately and in optimum time</p> <p>2.4 Outline the procedures for packing items safely, securely and labelling correctly</p> <p>2.5 Explain the importance of using the correct form of packaging and wrapping</p> <p>2.6 Identify the types of equipment and handling methods used to assemble orders</p>

Learning outcomes	Assessment criteria
<p>2 Understand how to process orders and dispatch goods <i>continued</i></p>	<p>2.7 Explain the characteristics and special requirements of goods being dispatched</p> <p>2.8 Explain health, safety and security considerations when dispatching goods</p> <p>2.9 State the importance of correctly preparing the dispatch area</p> <p>2.10 Explain when to use different loading methods</p> <p>2.11 Outline the requirements of the Lifting Operations and Lifting Equipment Regulations 1988 (LOLER)</p>
<p>3 Understand how to deliver effective customer service</p>	<p>3.1 Describe key roles within the supply chain</p> <p>3.2 State the qualities a customer expects from an individual</p> <p>3.3 State the qualities an employer expects from an employee</p> <p>3.4 Explain the listening skills required for dealing with different types of customers</p> <p>3.5 Describe the benefits to a business of having satisfied customers</p> <p>3.6 List common causes for customer complaints</p> <p>3.7 Explain the importance of communicating in an efficient and courteous manner</p> <p>3.8 Explain the benefits of understanding the stock range</p> <p>3.9 Explain where to find information about the stock range</p> <p>3.10 Explain the reasons for keeping up to date with information on stock</p> <p>3.11 State the reasons for keeping goods clean and in good condition</p>

Learning outcomes	Assessment criteria
<p>4 Understand Health, Safety, Security and Legislation</p>	<p>4.1 State the rights of employees according to the Health and Safety at work Act</p> <p>4.2 Identify the groups of people for which employers are liable in terms of health and safety</p> <p>4.3 State employees' responsibilities for health and safety</p> <p>4.4 State the employers' responsibilities for providing clearly defined procedures for health and safety</p> <p>4.5 Identify sources of information required for maintaining legal requirements</p> <p>4.6 Explain the importance of risk assessment</p> <p>4.7 Explain the correct safety procedures for lifting heavy items</p> <p>4.8 Describe procedures for dealing with emergencies</p> <p>4.9 Identify the essential contents of an accident report</p> <p>4.10 State the reasons for carrying out good housekeeping practices</p> <p>4.11 State the types of security incidents and external threats that may occur</p> <p>4.12 Explain the importance of monitoring unauthorised access by staff and others</p> <p>4.13 Explain ways of controlling threatening and/or violent behaviour from others</p>

Learning outcomes	Assessment criteria
<p>5 Understand how to be an effective team worker</p>	<p>5.1 Explain the importance of working effectively in a team</p> <p>5.2 State the importance of following organisational guidelines for communication</p> <p>5.3 Explain the benefits to an individual of knowing how their role fits within the team and organisation</p> <p>5.4 Explain the importance of feedback in personal development</p> <p>5.5 State the resources available for improving own performance</p> <p>5.6 State the methods available to identify own training needs</p> <p>5.7 Explain the benefits of a personal development plan to the individual and business</p> <p>5.8 Explain how to recognise and resolve conflict situations within a team</p>

Unit content

1 Understand how to receive and store good and materials

Importance of knowing what goods are due and when: planning, customer relationships, customer satisfaction, security, financial losses eg reporting goods damaged or broken during delivery

Preparing for goods: capacity, equipment, types of goods, safety, hygiene

Quality and quantity: correct types of goods, conditions, amount

Effective stock control system: correct stock levels, perishable stock, security, safety, hygiene, rotation, value

Methods of storage of goods: fixed, random, zoned positions

Conditions for storing goods: bonded, valuable, perishable, fragile, hazardous

Reporting and recording: delivery notes, IT systems, communication methods, how, why and who to report to

Personal Protective Equipment (PPE): safety footwear and headwear, Hi Vis clothing, gloves, ear defenders

2 Understand how to process orders and dispatch goods

Customer requirements: how is information obtained, what information is required for pickers, delivery times and dates, invoicing details, alternative offers

Documents and systems: electronic or manual systems, recording mechanisms

Importance of completing the order process: customer satisfaction, update stock records, changes to delivery dates, safety, appearance of the packaged item, costs, protection

Packaging: types, dispatch methods, security

Labelling: computer or manual, fragile, hazardous, weight, orientation, confidentiality

Types of equipment and handling methods: mechanical, manual

Characteristics and special requirements: size, weight, fragility, value, perishability, hazardous, wrapping

Health, safety and security: hygiene and harmful substances, personal and colleagues' safety, security of goods, theft and stock loss

Correctly preparing dispatch area: available space, security, obstructions, clean and tidy area, safety

Loading methods: mechanical or manual, side or rear

LOLER: all equipment must have the correct certificate confirming its lifting capacity, reduce the need and risk from lifting equipment, must be sufficiently strong, suitable and stable, need competent trained people, planned, expect inspections or examinations

3 Understand how to deliver effective customer service

Roles: pickers, packers, dispatchers, loader stock controllers

Customer expectations: polite, willing, knowledgeable about products, clean and presentable appearance, honest

Employer expectations: polite, willing, knowledgeable about products, clean and presentable appearance, honest, team worker, knowledgeable about systems used

Listening skills: identify requirements, needs and expectations of the customer, identify customer complaints, queries and questions, identify different types of customers (internal/external)

Benefits of good customer service: good customer relationships, reputation, repeat business

Complaints: damaged or faulty goods, goods missing, poor attitude, poor communication with customer

Communication and courteous manner: good first impressions, effective customer relationships over the telephone, face to face, electronic

Stock information: leaflets, computer systems, manufacturer, packaging, catalogues, size, weight, value, hazardous, fragile

Reasons for up to date information: storage, customer needs

Keeping stock clean and in good condition: quality, safety, hygiene, to prevent damage

4 Understand health, safety, security and legislation

Groups of people: employees, customers, visitors, contractors

Health and safety responsibilities: comply with organisational policies and regulatory requirements for health and safety of self and others

Employer responsibilities for health and safety: safe working environment, instructed/supervised staff, safe systems and methods

Procedures for health and safety: monitored, compliant with national/local regulations

Sources of legal information: supervisors, operating manuals, manufacturers' instructions, internet

Safety procedures: manual handling, mechanical lifting, team lifting, assistance

Procedures for dealing with emergencies: raise alarm, alarm types, evacuation procedures, escape routes, assembly areas, use of fire fighting equipment, reporting procedures

Types of emergencies: fire, flood, explosion, accidents

Accident report contents: name, date, time, type, location, environmental conditions, persons involved, injuries, actions, witnesses, who to inform

Reasons for good housekeeping: safety, security, efficiency

Housekeeping practices: keep clean and tidy area, dispose of waste

Security incidents: theft of stock or money related to staff/customers in workplace, violence, harassment, break in, contamination of stock

Unauthorised access: awareness and procedures for reporting, challenging staff and customers

Controlling threatening/violent behaviour: calm, keep distance, tone of voice, no shouting

5 Understand how to be an effective team worker

Working effectively in a team: improve performance, improve the business, customer satisfaction, team spirit, understand each other's job roles

Following organisational guidelines: comply with guidelines, effective team work, customer satisfaction

Communication methods: telephone, face to face, written, electronic

Benefits of understanding your job role: avoid duplication of work, effective and efficient performance, job satisfaction

Importance of feedback: encourages staff, identifies strengths and training needs

Resources: training, internet, books, videos/DVD, intranet

Methods of identification: appraisal, one-to-ones, personal development plan, training analysis

Benefits to individual and business: motivation, clear development, clear objectives, improved performance, staff retention and morale

Resolving conflict: promptly deal with issues, discussion, reporting, guidance, disciplinary procedures

Essential guidance for tutors

Delivery

This unit gives learners the opportunity to understand and develop the skills needed to undertake a successful role in warehousing and storage.

Learners need to develop their knowledge of various principles of warehousing and storage and the impact this has on the business. This could be achieved through practical activities such as role play and simulations that will give learners the opportunity to practise the skills they have developed, alongside formal tutor input.

This unit will support learners who are preparing for a Level 2 NVQ in Warehousing and Storage, including those who are participating in an Apprenticeship in Warehousing and Storage. It may be delivered as off the job learning for those learners in employment or those who are enrolled on an apprenticeship programme in tandem with their development and application of practical skills. Alternatively, it may be delivered as essential knowledge and understanding before learners gain practical experience. Learners would benefit from the opportunity to experience warehousing and storage context through work experience, work placement or part-time employment, but this is not essential.

Assessment

Learners will be expected to produce evidence that shows their knowledge and understanding of the warehousing and storage principles.

To achieve the learning outcomes, learners must provide evidence that they are familiar with and understand the principles of receiving and storing goods, processing orders and dispatching goods, delivering effective customer service; that they understand health, safety, security and legislation related to warehousing and storage and that they understand how to be an effective team worker.

Evidence can be in the form of a scenario-based assessment giving learners a number of different examples of problems relating to receiving and storing goods, describing the different types of stock control systems and procedures that could be used and the types of PPE worn in a warehousing and storage environment. Learners must provide evidence that they are familiar with and understand the principles of processing orders and dispatching goods. This could be in the form of a written report describing the procedure for processing and dispatching orders, identifying the documents and systems used to check stock availability, identifying the process timelines, the packing requirements of goods and the health, safety, security and labelling requirements of different types of goods. Learners could also relate the Lifting Operations and Lifting Equipment Regulations 1998 (LOLER) to their loading and dispatch methods.

Further information

For further information please call Customer Services on 0844 576 0026 (calls may be recorded for training purposes) or visit our website (www.edexcel.com).

Useful publications

Further copies of this document and related publications can be obtained from:

Edexcel Publications
Adamsway
Mansfield
Nottinghamshire NG18 4FN

Telephone: 01623 467 467
Fax: 01623 450 481
Email: publications@linney.com

Related information and publications include:

- *Guidance for Centres Offering Edexcel/BTEC QCF Accredited Programmes* (Edexcel, distributed to centres annually)
- *Functional Skills* publications – specifications, tutor support materials and question papers
- *Regulatory arrangements for the Qualification and Credit Framework published by Ofqual August 2008*
- the current Edexcel publications catalogue and update catalogue.

Edexcel publications concerning the Quality Assurance System and the internal and external verification of vocationally related programmes can be found on the Edexcel website and in the Edexcel publications catalogue.

NB: Some of our publications are priced. There is also a charge for postage and packing. Please check the cost when you order.

How to obtain National Occupational Standards

Skills for Logistics
12 Warren Yard
Warren Farm Office Village
Milton Keynes MK12 5NW

Telephone: 01908 313360
Fax: 01908 313006
Email: info@skillsforlogistics.org
Website: www.skillsforlogistics.org

Professional development and training

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

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

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

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

Our customer service numbers are:

BTEC and NVQ	0844 576 0026
GCSE	0844 576 0027
GCE	0844 576 0025
The Diploma	0844 576 0028
DIDA and other qualifications	0844 576 0031

Calls may be recorded for training purposes.

The training we provide:

- is active – ideas are developed and applied
- is designed to be supportive and thought provoking
- builds on best practice.

Our training is underpinned by the LLUK standards for those preparing to teach and for those seeking evidence for their continuing professional development.

Annexe A

The Edexcel/BTEC qualification framework for the UK Logistics and Freight Industries sector

Progression opportunities within the framework.

QCF Level	General qualifications	BTEC full vocationally-related qualifications	BTEC Short Courses	NVQ/occupational
8				
7				
6				
5				
4				
3				Level 3 NVQ in Driving Goods Vehicles Level 3 NVQ in Logistics Operations Management Level 3 NVQ in Storage and Warehousing Level 3 NVQ in Traffic Office

QCF Level	General qualifications	BTEC full vocationally-related qualifications	BTEC Short Courses	NVQ/occupational
2				Level 2 NVQ in Carry and Deliver Goods Level 2 NVQ in Distribution, Warehousing and Storage Operations NVQ Level 2 in Driving Goods Vehicles Level 2 NVQ in Traffic Office Level 2 NVQ in Warehousing and Storage
1		BTEC First Diploma in Logistics		Level 1 NVQ in Distributive Operations Level 1 NVQ in Warehousing and Storage
Entry				

Annexe B

Wider curriculum mapping

Study of the Edexcel BTEC Level 2 (QCF) qualifications gives learners opportunities to develop an understanding of spiritual, moral, ethical, social and cultural issues as well as an awareness of citizenship, environmental issues, European developments, health and safety considerations and equal opportunities issues.

Spiritual, moral, ethical, social and cultural issues

Throughout the delivery of these qualifications learners will have the opportunity to actively participate in different kinds of decision making. They will have to consider fair and unfair situations and explore how to resolve conflict. Working in small groups they will learn how to respect and value others' beliefs, backgrounds and traditions.

Citizenship

Learners undertaking these qualifications will have the opportunity to develop their understanding of citizenship issues.

Environmental issues

Developing a responsible attitude towards the care of the environment is an integral part of this qualification. Learners are encouraged to minimise waste and discuss controversial issues.

European developments

Much of the content of the qualification applies throughout Europe, even though the delivery is in a UK context.

Health and safety considerations

Health and safety is embedded within many of the units in this qualification. Learners will consider their own health and safety at work, how to identify risks and hazards and how to minimise those risks.

Equal opportunities issues

There will be opportunities throughout this qualification to explore different kinds of rights and how these affect both individuals and communities, for example learners will consider their rights at work and the rights of employers and how these rights affect the work community.

Annexe C

National Occupational Standards

The grid below maps the knowledge covered in the Edexcel BTEC Level 2 Certificate in Warehousing and Storage Principles against the underpinning knowledge of the SSC National Occupational Standards.

NOS title	Learning outcome				
	1	2	3	4	5
LOG 1 – Maintain health, safety, and security in logistics operations					
O - 1, 3 K&U - a, d L&R - k, l, m OP - O	✓				
O - 1 K&U - a L&R - k, l OP - O		✓			
O - 8 K&U - a, b, e, j L&R - k, l OP - n, o, p				✓	
LOG 3 – Contribute to effective working relationships with colleagues in logistics operations					
O - 2, 3 K&U - a, b, c L&R - i, j, k OP - m	✓				
O - 2, 3 K&U - a, b, c L&R - i, j		✓			
O - 2, 3 K&U - a, b, c L&R - j OP - m			✓		

NOS title	Learning outcome				
	1	2	3	4	5
LOG 3 – Contribute to effective working relationships with colleagues in logistics operations <i>continued</i>					
O - 2 K&U - a, c				✓	
O - 1, 2, 4, 5, 7, 8 K&U - a, b, c, d, e, f OP - m					✓
WS1 – Keep equipment in good working order					
O - 2, 10 K&U - b L&R - j, k OP - n	✓				
L&R - j, k OP - n		✓			
L&R - k OP - n			✓		
O - 1, 2, 3, 10 K&U - b, c L&R - i, j, k OP - n				✓	
WS2 – Keep stock at required levels					
O - 3, 7, 10, 11 K&U - c L&R - k, l, m OP - n, o	✓				
O - 11 L&R - k, l OP - o		✓			
O - 11 L&R - l OP - 0			✓		

NOS title	Learning outcome				
	1	2	3	4	5
WS2 – Keep stock at required levels <i>continued</i>					
O - 5, 11 L&R - j, k, l OP - o				✓	
WS3 – Keep work areas clean					
O - 2, 12 L&R - l, m OP - p	✓				
O - 12 K&U - a L&R - l, m OP - p		✓			
O - 4, 5, 7, 12 K&U - a L&R - k, l, m OP - p				✓	
WS4 – Handle goods manually in logistics facilities					
O - 2, 7, 9 K&U - 9 L&R - i, j OP - l, m	✓				
O - 1, 2, 3, 9 K&U - b, c L&R - i, j OP - m		✓			
O - 2, 3, 9 K&U - b, c L&R - h, i, j OP - m				✓	

NOS title	Learning outcome				
	1	2	3	4	5
WS5 – Pick goods to assemble orders for dispatch					
O - 3, 4, 5, 6, 7, 10 K&U - c, d, e L&R - h, i OP - l		✓			
O - 5, 10 K&U - e L&R - g, h, i OP - l				✓	
WS6 – Wrap and pack goods					
O - 2, 6, 7, 8, 10, 13 K&U - a, b, c L&R - h, i OP - l		✓			
O - 10, 13 L&R - h OP - l				✓	
LOG4 – Develop effective working relationships with colleagues in logistics operations					
K&U - b L&R - k, l OP - o	✓				
K&U - b L&R - k, l OP - o		✓			
O - i K&U - b L&R - k, l OP - o			✓		

NOS title	Learning outcome				
	1	2	3	4	5
LOG4 – Develop effective working relationships with colleagues in logistics operations <i>continued</i>					
L&R - j, k OP - o				✓	
O - 1, 8, 9, 10 K&U - a, b, f, h L&R - l OP - o					✓
WS7 – Provide customers with information and advice on goods and services					
O - 10 L&R - j, k OP - n	✓				
O - 1, 2, 3, 8 K&U - a, e, f OP - n			✓		
O - 10 L&R - j OP - n				✓	
WS8 – Operate equipment to perform work requirements					
O - 8 L&R - a, b OP - p	✓				
O - 1 K&U - a, b L&R - m OP - p		✓			
O - 8 L&R - l, m OP - p				✓	

NOS title	Learning outcome				
	1	2	3	4	5
WS9 – Move goods in logistics facilities					
O - 2, 9, 11 L&R - h, i OP - l	✓				
O - 11 K&U - c, d OP - p L&R - h, i		✓			
O - 11 K7U - b, c, d L&R - g, h, i OP - l				✓	
WS10 – Receive goods from deliveries					
O - 1, 2, 3, 9, 11 K&U - a, h, i L&R - l, m OP - p	✓				
O - 5, 11 K&U - f L&R - l, m OP - p		✓			
O - 5, 11 L&R - l, m OP - p			✓		
WS11 – Place goods in storage					
O - 1, 2, 4, 10 K&U - d, i L&R - m, n, o OP - q	✓				

NOS title	Learning outcome				
	1	2	3	4	5
WS11 – Place goods in storage <i>continued</i>					
O - 5, 10 K&U - g L&R - m, n OP - q		✓			
O - 3, 5, 6, 10 K&U - 1 L&R - l, m OP - q				✓	
WS12 – Maintain the safety and quality of goods					
O - 1, 4, 9 K&U - c, e L&R - h, i OP - l	✓				
O - 5, 9 K&U - e L&R - h, i OP - l		✓			
O - 5, 9 L&R - h, i OP - l			✓		
O - 2, 9 K&U - e L&R - h, i OP - l				✓	
WS13 – Maintain the safety of hazardous goods and materials					
O - 10 K&U - e L&R - k, l OP - p				✓	

NOS title	Learning outcome				
	1	2	3	4	5
WS14 – Maintain hygiene standards in handling and storing goods					
O - 1, 3, 9 K&U - a, d, e L&R - i, j OP - m	✓				
O - 5, 9 L&R - i, j, k OP - m		✓			
O - 5, 9 L&R - h, i OP - m				✓	
WS15 – Process orders for dispatch to customers					
O - 10 K&U - b L&R - h, i OP - l		✓			
O - 10 L&R - g, h, i OP - l				✓	
WS16 – Assemble orders for dispatch					
O - 5, 11 K&U - e, f L&R - j, k OP - m		✓			
O - 5, 11 K&U - e, f L&R - h, i, j OP - m				✓	

NOS title	Learning outcome				
	1	2	3	4	5
WS17 – Dispatch goods for delivery					
O - 4, 6, 11 K&U - b, c, d, e L&R - i, j OP - m		✓			
O - 6, 7, 11 K&U - c, f L&R - h, i, j OP - m				✓	
WS21 – Audit stock levels and stock records					
O - 12 L&R - i, j, k OP - n				✓	

Key

a blank space indicates no coverage of the underpinning knowledge

- O Occupational standards
- K&U Knowledge and understanding
- L&R Legal and regulations
- OP Organisational procedures

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