

Level 2 Award/Certificate in Forklift Truck Operations (3884)



Candidate logbook

Award (600/4669/7)

Certificate (600/4695/8)

www.cityandguilds.com
October 2013
Version 1.1

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1.1 Oct 2013	Amended title	Various

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City & Guilds Group

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1 About your candidate logbook

1.1 Contact details

Candidate name	
Candidate enrolment no	
Centre name	
Centre number	
Programme start date	
Date of registration with City & Guilds	

Keep a record of relevant contact details in the space provided below. You may find it helpful to make a note of phone numbers and e-mail addresses here.

Your Assessor(s)	
Your Internal Verifier	
Quality Assurance Contact	

1 About your candidate logbook

1.2 Introduction to the logbook

This logbook will help you complete the units in City & Guilds' **Level 2 Award/Certificate in Forklift Truck Operations (3884)**. It contains forms you can use to record your evidence of what you have done.

There are 16 units in total available in these qualifications. You should discuss and agree with your assessor/tutor which of these units you are going to work towards. The units in this logbook are for the Level 2 Award and Certificate qualification.

About City & Guilds

City & Guilds is your awarding body for this qualification. City & Guilds is the UK's leading awarding body for vocational qualifications.

Information about City & Guilds and our qualifications is available on our website **www.cityandguilds.com**.

2 Units

To achieve the **Level 2 Award/Certificate in Forklift Truck Operations (3884)**, learners must achieve **12** credits. They must complete **12** credits from the mandatory units.

City & Guilds unit	Unit title	GLH	Credit value
Mandatory group			
201	Prepare the forklift truck for driving or manoeuvring	6	1
202	Operate, move or manoeuvre the forklift truck	7	2
203	Select, transfer and position loads using a forklift truck	8	2
204	Undertake post operational checks on forklift trucks	6	1
205	Load the container, vehicle, vessel or craft	9	3
206	Unload the container, vehicle, vessel or craft	9	3

To achieve the **Level 2 Award/Certificate in Forklift Truck Operations (3884)**, learners must achieve a minimum of **24** credits. They must complete **17** credits from the mandatory units, a minimum of **1** credit from optional group A, a minimum of **3** credits from optional group 2 and a minimum of **3** credits from optional group C.

City & Guilds unit	Unit title	GLH	Credit value
Mandatory group			
201	Prepare the forklift truck for driving or manoeuvring	6	1
202	Operate, move or manoeuvre the forklift truck	7	2
203	Select, transfer and position loads using a forklift truck	8	2
204	Undertake post operational checks on forklift trucks	6	1
207	Obtain information on the collection and/or delivery of loads	10	2
208	Make an effective contribution to the business in the logistics sector	10	3
209	Contribute to the provision of customer service in logistics operations	18	3
210	Health, safety and security at work	20	3
Optional group A			
211	Keep work areas clean in logistics operations	17	3
212	Maintain hygiene standards in handling and storing goods in logistics operations	16	3
213	Principles of food safety in logistics	9	1
Optional group B			
214	Moving and/or handling goods in logistics operations	15	4

215	Sort goods and materials for recycling or disposal in logistics operations	10	3
216	Wrap and pack goods in logistics operations	12	3
Optional group C			
205	Load the container, vehicle, vessel or craft	9	3
206	Unload the container, vehicle, vessel or craft	9	3

3 The assessment process

Simulation is allowed in some of the units in this qualification. Where simulation is needed this must be agreed with your external verifier in advance to ensure validity. Candidates should be assessed under normal workplace conditions. However, there are situations where the actual workplace may not be appropriate, or where waiting for naturally occurring evidence is impractical. Therefore, the setting up or devising of assessment situations will be allowed where appropriate.

The following people at your centre will explain the assessment process and help you achieve your unit(s).

The assessor/tutor

The assessor/tutor is the person you will have the most contact with as you work towards your unit(s). You may have more than one assessor/tutor depending on which unit(s) you take or you may be assessed by a person who is not your tutor.

The internal verifier

The internal verifier maintains the quality of assessment within the centre.

The external verifier

The external verifier works for City & Guilds and helps to ensure that your centre meets the required standards for quality and assessment.

4 Using your logbook

Recording forms

This logbook contains all of the forms you and your assessor will need to plan, review and organise your evidence. Your assessor will be able to help you decide which forms you need to complete and help you fill them in.

Please photocopy these forms as required.

5 Candidate progress record

Level 2 Award/Certificate in Forklift Truck Operations (3884)

Minimum 12 credits

Units	201	202	203	204	205	206									
Credits	1	2	2	1	3	3									

Total Credits Achieved:

Level 2 Award/Certificate in Forklift Truck Operations (3884)

Minimum 24 credits

Units	201	202	203	204	205	206	207	208	209	210	211	212	213	214	215	216
Credits	1	2	2	1	3	3	2	3	3	3	3	3	1	4	3	3

Total Credits Achieved:

I confirm that the evidence supplied for the above listed units is authentic and a true representation of my own work. The work logged in the following pages is my own work carried out during my normal work duties.

The answers in the question bank are my own work and discussed with my assessor on completion. I have been observed in my workplace by my assessor on several occasions.

Candidate Name:	
Candidate Signature:	
Date:	

I confirm that this candidate has achieved all the requirements of this qualification with the evidence listed. Assessment was conducted under the specified conditions and context, and is valid, authentic, reliable, current and sufficient.

Assessor Name:	
Assessor Signature:	
Date:	

IV Name:	
IV Signature:	
Date:	

Unit 201

Prepare the fork lift truck for driving or manoeuvring

1 credit

Outcome 1 Know how to prepare the fork lift truck for driving or manoeuvring

Assessment criteria (Knowledge) The learner can:	Portfolio reference	
1.1 Explain the relevant organisational policies and procedures, in relation to preparing the fork lift truck for driving or manoeuvring, that relate to:		
<ul style="list-style-type: none"> • Health, safety and security 		
<ul style="list-style-type: none"> • Personal protective equipment 		
<ul style="list-style-type: none"> • Legal requirements 		
<ul style="list-style-type: none"> • Operating requirements 		
1.2 Explain how to check that the fork lift truck has sufficient fuel or energy for the task or shift		
1.3 Explain the operation of the fork lift trucks' instruments and controls to include:		
<ul style="list-style-type: none"> • How to check the vehicle systems 		
<ul style="list-style-type: none"> • How to check instruments, controls, gauges and vehicle systems 		
<ul style="list-style-type: none"> • Position of forks and or attachments for the load or travelling 		
<ul style="list-style-type: none"> • Indications of electrical or mechanical problems 		
1.4 Explain the responsibilities of the fork lift truck driver for the fork lift truck and the load		
1.5 Explain the organisational procedures for reporting defects including information on previously reported problems with the fork lift truck		
1.6 Explain how to obtain information on previously reported problems with the fork lift truck		
1.7 Explain which person(s) is officially responsible for allocating equipment or task		
1.8 Identify problems that can occur when preparing the fork lift truck for driving or manoeuvring		
1.9 Explain the appropriate action to take, in order to deal with identified problems		
Type of evidence →		
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

Outcome 2 Be able to prepare the fork lift truck for driving or manoeuvring

Assessment criteria (Performance)	Evidence date					
The learner can:	Portfolio reference					
2.1 Follow all organisational policies and procedures, in relation to preparing the fork lift truck for driving or manoeuvring, that relate to:						
• Health, safety and security						
• Personal protective equipment						
• Legal requirements						
• Operating requirements						
2.2 Check the fork lift truck has sufficient fuel or energy for the task or shift						
2.3 Check the fork lift truck systems to ensure the fork lift truck complies with operational and legal requirements						
2.4 Carry out adjustments to optimize control, observation and comfort						
2.5 Check that any ancillary attachments are in working order						
2.6 Position fork lift truck and any attachments used in an authorised position, location or parking bay as appropriate when not in use						
Type of evidence →						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Declaration

I confirm that the evidence supplied for the above listed unit is authentic and a true representation of my own work. The work logged is my own work carried out during my normal work duties.

The answers in the question bank are my own work and discussed with my assessor on completion. I have been observed in my workplace by my assessor on several occasions.

Candidate Name:	
Candidate Signature:	
Date:	

I confirm that this candidate has achieved all the requirements of this unit with the evidence listed. Assessment was conducted under the specified conditions and context, and is valid, authentic, reliable, current and sufficient.

Assessor Name:	
Assessor Signature:	
Date:	

IV Name:	
IV Signature:	
Date:	

Unit 202

Operate, move or manoeuvre the fork lift truck

2 credits

Outcome 1 Know how to operate, move or manoeuvre the fork lift truck

Assessment criteria (Knowledge) The learner can:	Portfolio reference	
1.1 Explain the relevant organisational policies and procedures, in relation to operating, moving or manoeuvring the fork lift truck, that relate to:		
<ul style="list-style-type: none"> • Health, safety and security 		
<ul style="list-style-type: none"> • Personal protective equipment 		
<ul style="list-style-type: none"> • Legal requirements 		
<ul style="list-style-type: none"> • Operating requirements 		
<ul style="list-style-type: none"> • Different locations 		
<ul style="list-style-type: none"> • Different loads 		
<ul style="list-style-type: none"> • Theft or damage (to truck and/or load) 		
1.2 Explain the observations required for operating, moving or manoeuvring the fork lift truck		
1.3 Explain how different audible and/or visual warning device are used		
1.4 Describe the risks associated with driving, moving or manoeuvring the fork lift truck at different locations		
1.5 Explain the factors that can affect the stability of the fork lift 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 fork lift truck		
1.8 Explain the appropriate action to take, in order to deal with identified problems		
Type of evidence →		
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

Outcome 2 Be able to operate, move or manoeuvre the fork lift truck

Assessment criteria (Performance)	Evidence date					
The learner can:	Portfolio reference					
2.1 Follow the relevant organisational policies and procedures, in relation to operating, moving or manoeuvring the fork lift truck, 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 fork lift truck smoothly maintaining stability of both fork lift truck and load						
2.8 Negotiate inclines and declines in a manner that will maintain the stability of both fork lift truck and the load						
2.9 Locate a suitable space for turning aligning pivot and reference points are sufficient						
2.10 Turn the fork lift truck in a manner that will maintain the stability of both fork lift truck and the load						
2.11 Stop the fork lift truck in a manner that will maintain the stability of both fork lift truck and the load						
2.12 Position the fork lift truck and any attachments used in an authorised position, location or parking bay as appropriate when not in use						
2.13 Dismount the fork lift truck safely						
2.14 Record all work according to organisational requirements						
Type of evidence →						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Declaration

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Candidate Name:	
Candidate Signature:	
Date:	

I confirm that this candidate has achieved all the requirements of this unit with the evidence listed. Assessment was conducted under the specified conditions and context, and is valid, authentic, reliable, current and sufficient.

Assessor Name:	
Assessor Signature:	
Date:	

IV Name:	
IV Signature:	
Date:	

Unit 203

Select, transfer and position loads using a fork lift truck

2 credits

Outcome 1 Know how to select, transfer and position loads using a fork lift truck

Assessment criteria (Knowledge) The learner can:	Portfolio reference	
1.1 Explain the relevant organisational policies and procedures, that relate to:		
<ul style="list-style-type: none"> • Health, safety and security 		
<ul style="list-style-type: none"> • Personal protective equipment 		
<ul style="list-style-type: none"> • Legal requirements 		
<ul style="list-style-type: none"> • Lifting systems 		
<ul style="list-style-type: none"> • Different locations 		
<ul style="list-style-type: none"> • 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 fork lift truck when engaged in selecting, transferring and positioning loads		
1.5 Explain the dangers of overloading the fork lift truck		
1.6 Identify problems that can occur when selecting, transferring and positioning loads using a fork lift truck		
1.7 Explain the appropriate action to take, in order to deal with identified problems		
Type of evidence →		
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

Outcome 2 Be able to select, transfer and position loads using a fork lift truck

Assessment criteria (Performance)	Evidence date					
The learner can:	Portfolio reference					
2.1 Follow all organisational policies and procedures that relate to:						
• Health, safety and security						
• Personal protective equipment						
• Legal requirements						
• Fork lift 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 fork lift truck and others						
2.8 Check that the safety and security of the load is maintained during transfer						
2.9 Check that the location allocated for the load is suitable						
2.10 Set the load down load in the correct position and location safely						
2.11 Record all work according to organisational requirements						
Type of evidence →						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Declaration

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The answers in the question bank are my own work and discussed with my assessor on completion. I have been observed in my workplace by my assessor on several occasions.

Candidate Name:	
Candidate Signature:	
Date:	

I confirm that this candidate has achieved all the requirements of this unit with the evidence listed. Assessment was conducted under the specified conditions and context, and is valid, authentic, reliable, current and sufficient.

Assessor Name:	
Assessor Signature:	
Date:	

IV Name:	
IV Signature:	
Date:	

Unit 204

Undertake post operational checks for fork lift trucks

1 credit

Outcome 1 Know how to undertake post operational checks for a fork lift truck

Assessment criteria (Knowledge) The learner can:	Portfolio reference	
1.1 Explain the relevant organisational policies and procedures, that relate to:		
• Health, safety and security		
• Personal protective equipment		
• Legal requirements		
• Lifting systems		
• Different loads		
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 undertaking post operational checks for a fork lift truck		
1.5 Explain the appropriate action to take, in order to deal with identified problems		
	Type of evidence →	
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

Outcome 2 Be able to undertake post operational checks for fork lift trucks

Assessment criteria (Performance)	Evidence date					
The learner can:	Portfolio reference					
2.1 Follow all organisational policies and procedures that relate to:						
• Health, safety and security						
• Personal protective equipment						
• Legal requirements						
• Fork lift operating systems						
• Different loads						
2.2 Undertake the routine checks that must be carried out after using the fork lift truck						
2.3 Check that the regulations relating to the fork lift truck are met						
2.4 Demonstrate how to complete post						
2.5 Position the fork lift truck and any attachments used in an authorised position, location or parking bay as appropriate when not in use						
2.6 Complete all relevant paperwork according to organisational procedures						
Type of evidence →						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Declaration

I confirm that the evidence supplied for the above listed unit is authentic and a true representation of my own work. The work logged is my own work carried out during my normal work duties.

The answers in the question bank are my own work and discussed with my assessor on completion. I have been observed in my workplace by my assessor on several occasions.

Candidate Name:	
Candidate Signature:	
Date:	

I confirm that this candidate has achieved all the requirements of this unit with the evidence listed. Assessment was conducted under the specified conditions and context, and is valid, authentic, reliable, current and sufficient.

Assessor Name:	
Assessor Signature:	
Date:	

IV Name:	
IV Signature:	
Date:	

Unit 205

Load the container, vehicle, vessel or craft

3 credits

Outcome 1 Know how to load the container, vehicle, vessel or craft using a fork lift truck

Assessment criteria (Knowledge) The learner can:	Portfolio reference	
1.1 Explain the relevant organisational policies and procedures for loading the container, vehicle, vessel or craft that relate to:		
<ul style="list-style-type: none"> • • health, safety and security 		
<ul style="list-style-type: none"> • • personal protective equipment 		
<ul style="list-style-type: none"> • • legal requirements 		
<ul style="list-style-type: none"> • • lifting systems 		
<ul style="list-style-type: none"> • • different locations 		
<ul style="list-style-type: none"> • • different containers, vehicles, vessels or craft 		
<ul style="list-style-type: none"> • • 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 fork lift truck when engaged in loading the container, vehicle, vessel or craft		
1.5 Explain the dangers of overloading the fork lift truck		
1.6 Explain load restrictions for the container, vehicle, vessel or craft		
1.7 Explain factors that can affect loading and delivery sequences		
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 fork lift truck		
1.10 Explain the appropriate action to take, in order to deal with identified problems		
Type of evidence →		
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

Outcome 2 Be able to load the container, vehicle, vessel or craft using a fork lift truck

Assessment criteria (Performance)	Evidence date					
The learner can:	Portfolio reference					
2.1 Follow all organisational policies and procedures for loading the container, vehicle, vessel or craft using the fork lift truck relate to:						
• health, safety and security						
• personal protective equipment						
• • legal requirements						
• • fork lift operating systems						
• • 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						
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 fork lift truck and others when manoeuvring the fork lift truck						
2.9 Operate the vehicle controls to maintain the safety, security of yourself, the fork lift 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 in the correct position and location safely						
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						
Type of evidence →						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Declaration

I confirm that the evidence supplied for the above listed unit is authentic and a true representation of my own work. The work logged is my own work carried out during my normal work duties.

The answers in the question bank are my own work and discussed with my assessor on completion. I have been observed in my workplace by my assessor on several occasions.

Candidate Name:	
Candidate Signature:	
Date:	

I confirm that this candidate has achieved all the requirements of this unit with the evidence listed. Assessment was conducted under the specified conditions and context, and is valid, authentic, reliable, current and sufficient.

Assessor Name:	
Assessor Signature:	
Date:	

IV Name:	
IV Signature:	
Date:	

Unit 206

Unload the container, vehicle, vessel or craft

3 credits

Outcome 1 Know how to unload the container, vehicle, vessel or craft using a fork lift truck

Assessment criteria (Knowledge) The learner can:	Portfolio reference	
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		
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 fork lift 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 unloading		
1.6 Explain the dangers of overloading the fork lift truck		
1.7 Identify the person responsible for receiving the load		
1.8 Identify problems that can occur when unloading a container, vehicle, vessel or craft using a fork lift truck		
1.9 Explain the appropriate action to take, in order to deal with identified problems		
Type of evidence →		
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

Outcome 2 Be able to load the container, vehicle, vessel or craft using a fork lift truck

Assessment criteria (Performance)	Evidence date					
The learner can:	Portfolio reference					
2.1 Follow all organisational policies and procedures for unloading the container, vehicle, vessel or craft using the fork lift truck relate to:						
• health, safety and security						
• personal protective equipment						
• legal requirements						
• fork lift operating systems						
• different locations						
• different containers, vehicles, vessels or craft						
• different loads						
• proof of delivery systems						
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						
2.6 Communicate effectively						
2.7 Maintain the safety, security of yourself, the fork lift truck and others when manoeuvring the fork lift 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 vehicle controls to maintain the safety, security of yourself, the fork lift 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 in the correct position and location safely						
2.13 Record all work according to organisational requirements						
Type of evidence →						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Declaration

I confirm that the evidence supplied for the above listed unit is authentic and a true representation of my own work. The work logged is my own work carried out during my normal work duties.

The answers in the question bank are my own work and discussed with my assessor on completion. I have been observed in my workplace by my assessor on several occasions.

Candidate Name:	
Candidate Signature:	
Date:	

I confirm that this candidate has achieved all the requirements of this unit with the evidence listed. Assessment was conducted under the specified conditions and context, and is valid, authentic, reliable, current and sufficient.

Assessor Name:	
Assessor Signature:	
Date:	

IV Name:	
IV Signature:	
Date:	

Unit 207

Obtain information on the collection and/or delivery of loads

2 credits

Outcome 1 Know how to obtain information on the collection and/or delivery of loads

Assessment criteria (Knowledge) The learner can:	Portfolio reference	
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:		
<ul style="list-style-type: none"> • health, safety and security 		
<ul style="list-style-type: none"> • legal requirements 		
<ul style="list-style-type: none"> • operating requirements 		
<ul style="list-style-type: none"> • monitoring requirements 		
1.2 Explain the required information on the load to include:		
<ul style="list-style-type: none"> • the type of information for the load 		
<ul style="list-style-type: none"> • where the information can be found 		
<ul style="list-style-type: none"> • destination and schedule and any recent information that could affect the destination and schedule 		
<ul style="list-style-type: none"> • requirements for loading and unloading 		
<ul style="list-style-type: none"> • requirements for collections 		
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		
Type of evidence →		
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

Outcome 2 Be able to obtain information on the collection and/or delivery of loads

Assessment criteria (Performance)	Evidence date					
The learner can:	Portfolio reference					
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						
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						
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						
Type of evidence →						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Declaration

I confirm that the evidence supplied for the above listed unit is authentic and a true representation of my own work. The work logged is my own work carried out during my normal work duties.

The answers in the question bank are my own work and discussed with my assessor on completion. I have been observed in my workplace by my assessor on several occasions.

Candidate Name:	
Candidate Signature:	
Date:	

I confirm that this candidate has achieved all the requirements of this unit with the evidence listed. Assessment was conducted under the specified conditions and context, and is valid, authentic, reliable, current and sufficient.

Assessor Name:	
Assessor Signature:	
Date:	

IV Name:	
IV Signature:	
Date:	

Unit 208

Make an effective contribution to the business in the logistics sector

3 credits

Outcome 1 Know how to make an effective contribution to a business in the logistics sector

Assessment criteria (Knowledge) The learner can:	Portfolio reference	
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		
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		
	Type of evidence →	
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

Outcome 2 Be able to make an effective contribution to a business in the logistics sector

Assessment criteria (Performance)	Evidence date					
The learner can:	Portfolio reference					
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						
2.5 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						
2.8 Promptly action requests from others that fall within own responsibility						
Type of evidence →						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Declaration

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Candidate Name:	
Candidate Signature:	
Date:	

I confirm that this candidate has achieved all the requirements of this unit with the evidence listed. Assessment was conducted under the specified conditions and context, and is valid, authentic, reliable, current and sufficient.

Assessor Name:	
Assessor Signature:	
Date:	

IV Name:	
IV Signature:	
Date:	

Unit 209

Contribute to the provision of customer service in logistics operations

3 credits

Outcome 1 Know how to contribute to the provision of customer services in logistics operations

Assessment criteria (Knowledge) The learner can:	Portfolio reference	
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		
1.5 Describe the implications of:		
• a negative image on your organisation		
• poor communication		
• poor customer service		
1.6 Describe how misunderstandings and conflict in working relationships may be resolved constructively		
• 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		
	Type of evidence →	
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

Outcome 2 Be able to contribute to the provision of customer services in logistics operations

Assessment criteria (Performance)	Evidence date					
The learner can:	Portfolio reference					
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 clothing						
• maintaining effective customer relations						
• personal appearance and hygiene						
• reporting procedures and systems						
• recording information						
• confidentiality						
• complaints						
Develop positive relationships with customers						
2.3 Ensure that own personal appearance and hygiene meet organisational policies and standards						
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						
Type of evidence →						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

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Assessor Name:	
Assessor Signature:	
Date:	

IV Name:	
IV Signature:	
Date:	

Unit 210

Health, safety and security at work

3 credits

Outcome 1 Be able to work safely

Assessment criteria (Performance)	Evidence date					
The learner can:	Portfolio reference					
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 & Safety at Work Act / COSHH						
1.9 Identify who the nominated first aiders are						
Type of evidence →						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Outcome 2 Be able to monitor the workplace for hazards

Assessment criteria (Performance)	Evidence date					
The learner can:	Portfolio reference					
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)						
Type of evidence →						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Outcome 3 Be able to contribute to workplace security

Assessment criteria (Performance)	Evidence date					
The learner can:	Portfolio reference					
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						
Type of evidence →						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

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Date:	

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Assessor Name:	
Assessor Signature:	
Date:	

IV Name:	
IV Signature:	
Date:	

Unit 211

Keep work areas clean in logistics operations

3 credits

Outcome 1 Know the requirements relating to the cleaning of work areas in logistics operations

Assessment criteria (Knowledge) The learner can:	Portfolio reference	
1.1 Explain the relevant organisational policies and procedures for cleaning work areas in logistics operations, that relate to:		
• health, safety and security		
• personal protective equipment		
• 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		
	Type of evidence →	
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

Outcome 2 Be able to carry out correct cleaning procedures in logistics operations

Assessment criteria (Performance)	Evidence date					
The learner can:	Portfolio reference					
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						
Type of evidence →						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Outcome 3 Be able to follow post cleaning procedures in logistics operations

Assessment criteria (Performance)	Evidence date					
The learner can:	Portfolio reference					
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						
Type of evidence →						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Declaration

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Candidate Name:	
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Date:	

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Assessor Name:	
Assessor Signature:	
Date:	

IV Name:	
IV Signature:	
Date:	

Unit 212

Maintain hygiene standards in handling and storing goods in logistics operations

3 credits

Outcome 1 Know how to maintain hygiene standards when handling and storing goods in logistics operations

Assessment criteria (Knowledge) The learner can:	Portfolio reference	
1.1 Explain the relevant organisational policies and procedures for maintaining hygiene standards in handling and storing goods in logistics operations, that relate to:		
<ul style="list-style-type: none"> • health, safety and security 		
<ul style="list-style-type: none"> • personal protective equipment 		
<ul style="list-style-type: none"> • personal hygiene 		
<ul style="list-style-type: none"> • environmental factors 		
<ul style="list-style-type: none"> • special requirements 		
<ul style="list-style-type: none"> • 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		
Type of evidence →		
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

Outcome 2 Be able to maintain standards of hygiene when handling and storing goods in logistics operations

Assessment criteria (Performance)	Evidence date					
The learner can:	Portfolio reference					
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						
2.4 Handle the goods using the correct handling methods and equipment						
2.5 Dispose of waste in accordance with organisational policies and procedures						
Type of evidence →						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

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Date:	

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Assessor Name:	
Assessor Signature:	
Date:	

IV Name:	
IV Signature:	
Date:	

Unit 213

Principles of food safety in logistics

1 credit

Outcome 1 Understand how individuals must take responsibility for food safety

Assessment criteria (Knowledge) The learner can:	Portfolio reference	
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		
	Type of evidence →	
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

Outcome 2 Understand how to keep him/herself clean and hygienic

Assessment criteria (Knowledge) The learner can:	Portfolio reference	
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		
	Type of evidence →	
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

Outcome 3 Understand how to keep storage areas and vehicles clean

Assessment criteria (Knowledge) The learner can:	Portfolio reference	
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		
	Type of evidence →	
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

Outcome 4 Understand how to keep food safe

Assessment criteria (Knowledge) The learner can:	Portfolio reference	
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		
Type of evidence →		
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

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Assessor Name:	
Assessor Signature:	
Date:	

IV Name:	
IV Signature:	
Date:	

Unit 214

Moving and/or handling goods in logistics operations

4 credits

Outcome 1 Know how to move and/or handle goods in logistics operations

Assessment criteria (Knowledge) The learner can:	Portfolio reference	
1.1 Explain the relevant organisational policies and procedures for moving and/or handling goods in logistics operations that relate to:		
<ul style="list-style-type: none"> • health, safety and security 		
<ul style="list-style-type: none"> • environmental factors 		
<ul style="list-style-type: none"> • special requirements 		
<ul style="list-style-type: none"> • legal requirements 		
<ul style="list-style-type: none"> • operating requirements 		
<ul style="list-style-type: none"> • 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		
Type of evidence →		
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

Outcome 2 Be able to move and/or handle the goods in logistics operations

Assessment criteria (Performance)	Evidence date					
The learner can:	Portfolio reference					
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						
Type of evidence →						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Declaration

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Assessor Name:	
Assessor Signature:	
Date:	

IV Name:	
IV Signature:	
Date:	

Unit 215

Sort goods and materials for recycling or disposal in logistics operations

3 credits

Outcome 1 Know how to sort goods and materials for recycling or disposal in logistics operations

Assessment criteria (Knowledge) The learner can:	Portfolio reference	
1.1 Explain the relevant organisational policies and procedures for sorting goods and materials for recycling and disposal in logistics operations, that relate to:		
<ul style="list-style-type: none"> • health, safety and security 		
<ul style="list-style-type: none"> • personal protective equipment 		
<ul style="list-style-type: none"> • environmental factors 		
<ul style="list-style-type: none"> • special requirements 		
<ul style="list-style-type: none"> • waste management 		
<ul style="list-style-type: none"> • 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		
Type of evidence →		
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

Outcome 2 Be able to sort the goods and materials for recycling or disposal in logistics operations

Assessment criteria (Performance)	Evidence date					
The learner can:	Portfolio reference					
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						
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						
Type of evidence →						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Declaration

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Assessor Name:	
Assessor Signature:	
Date:	

IV Name:	
IV Signature:	
Date:	

Unit 216

Wrap and pack goods in logistics operations

3 credits

Outcome 1 Know how to prepare the goods for wrapping and packing in logistics operations

Assessment criteria (Knowledge) The learner can:	Portfolio reference	
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		
• environmental factors		
• special requirements		
• personal protective equipment		
• waste management		
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		
Type of evidence →		
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

Outcome 2 Be able to wrap and pack the goods in logistics operations

Assessment criteria (Performance)	Evidence date					
The learner can:	Portfolio reference					
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						
Type of evidence →						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Declaration

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Candidate Signature:	
Date:	

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Assessor Name:	
Assessor Signature:	
Date:	

IV Name:	
IV Signature:	
Date:	

Appendix 1 Summary of City & Guilds assessment policies

Health and Safety

All centres have to make sure that they provide a safe and healthy environment for learning, including induction and assessment. City & Guilds external verifiers check this when they visit assessment centres.

Equal Opportunities

Your centre will have an equal opportunities policy. Your centre will explain this to you during your induction, and may give you a copy of the policy.

City & Guilds equal opportunities policy is available from our website www.cityandguilds.com, City & Guilds Customer Relations Team or your centre.

Access to assessment

City & Guilds qualifications are open to all candidates, whatever their gender, race, creed, age or special needs. Some candidates may need extra help with their assessment, for example, a person with a visual impairment may need a reader.

If you think you will need alternative assessment arrangements because you have special needs, you should discuss this with your centre during your induction, and record this on your assessment plan. City & Guilds will allow centres to make alternative arrangements for you if you are eligible and if the qualification allows for this. This must be agreed before you start your qualification.

City & Guilds guidance and regulations document *Access to assessment and qualifications* is available on the City & Guilds website www.cityandguilds.com, from the City & Guilds Customer Relations Team or your centre.

Complaints and appeals

Centres must have a policy and procedure to deal with any complaints you may have. You may feel you have not been assessed fairly, or may want to appeal against an assessment decision if you do not agree with your assessor.

These procedures will be explained during induction and you will be provided with information about the Quality Assurance Co-ordinator within your centre who is responsible for this.

Most complaints and appeals can be resolved within the centre, but if you follow the centre procedure and are still not satisfied you can complain to City & Guilds.

Our complaints policy is on our website www.cityandguilds.com or is available from the City & Guilds Customer Relations Team or your centre.

Useful contacts

UK learners

General qualification information

T: +44 (0)844 543 0033

E: learnersupport@cityandguilds.com

International learners

General qualification information

T: +44 (0)844 543 0033

F: +44 (0)20 7294 2413

E: intcg@cityandguilds.com

Centres

Exam entries, Certificates, Registrations/enrolment, Invoices, Missing or late exam materials, Nominal roll reports, Results

T: +44 (0)844 543 0000

F: +44 (0)20 7294 2413

E: centresupport@cityandguilds.com

Single subject qualifications

Exam entries, Results, Certification, Missing or late exam materials, Incorrect exam papers, Forms request (BB, results entry), Exam date and time change

T: +44 (0)844 543 0000

F: +44 (0)20 7294 2413

F: +44 (0)20 7294 2404 (BB forms)

E: singlesubjects@cityandguilds.com

International awards

Results, Entries, Enrolments, Invoices, Missing or late exam materials, Nominal roll reports

T: +44 (0)844 543 0000

F: +44 (0)20 7294 2413

E: intops@cityandguilds.com

Walled Garden

Re-issue of password or username, Technical problems, Entries, Results, e-assessment, Navigation, User/menu option, Problems

T: +44 (0)844 543 0000

F: +44 (0)20 7294 2413

E: walledgarden@cityandguilds.com

Employer

Employer solutions, Mapping, Accreditation, Development Skills, Consultancy

T: +44 (0)121 503 8993

E: business@cityandguilds.com

Publications

Logbooks, Centre documents, Forms, Free literature

T: +44 (0)844 543 0000

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If you have a complaint, or any suggestions for improvement about any of the services that City & Guilds provides, email:
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