

Level 1 Award Certificate Diploma in Retail Skills (7384- 10/11/12)

Candidate logbook

600/3947/4

600/3948/6

600/3949/8



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Level 1 Award Certificate Diploma in Retail Skills (7384- 10/11/12)

Candidate logbook

Version and date	Change detail	Section
1.1 Jan 2012	Additional Sections added	Candidate Record of Achievement & Expert/Witness Status list

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Contents

1	About your candidate logbook	7
1.1	Contact details	7
1.2	Introduction to the logbook	8
2	Units	9
3	The assessment process	16
4	Using your logbook	17
5	Candidate Record of Achievement	18
6	Expert/Witness Status list	19
Unit 101	Move goods and materials manually in a retail environment (B.01)	20
Unit 102	Keep stock at required levels in a retail environment (B.02)	23
Unit 103	Sort donated goods for resale or recycling in a retail environment (B.08)	26
Unit 104	Maintain food safety while working with food in a retail environment (B.20)	28
Unit 105	Load orders for despatch from a retail store to customers (B.29)	31
Unit 106	Wrap and pack goods for customers in a retail environment (C.01)	35
Unit 107	Contribute to monitoring and maintaining ease of shopping in a retail sales area (C.51)	38
Unit 108	Recognise and report security risks in a retail environment (E.01)	40
Unit 109	Comply with workplace health and safety requirements in a retail environment (E.02)	42
Unit 110	Work effectively in a retail team (E.03)	46
Unit 111	Keep the non-food retail environment clean and tidy (E.04)	49
Unit 112	Provide a counter and takeaway service (C.44)	52
Unit 201	Receive goods and materials into storage in a retail environment (B.03)	55
Unit 202	Place goods and materials into storage in a retail environment (B.04)	58
Unit 203	Keep stock on sale at required levels in a retail environment (B.05)	61
Unit 204	Process customer orders for goods in a retail environment (B.06)	64
Unit 205	Process returned goods in a retail environment (B.07)	67
Unit 206	Assemble products for display in a retail environment (B.09)	70
Unit 207	Hand-process fish in a retail environment (B.11)	72
Unit 208	Process greengrocery products for sale in a retail environment (B.12)	75
Unit 209	Finish meat products by hand in a retail environment (B.13)	78
Unit 210	Organise own work to meet a dough production schedule in a retail environment (B.17)	81
Unit 211	Maintain food safety while working with food in a retail environment (B.21)	84
Unit 212	Pick products in a retail environment to fulfil customer orders (B.28)	88
Unit 213	Check stock levels and sort out problems with stock levels in a retail environment (B.30)	91
Unit 214	Finish bake-off food products in a retail environment (B.35)	94

Unit 215	Glaze, coat or decorate bake-off products for sale in a retail environment (B.36)	97
Unit 216	Display stock to promote sales to customers in a retail environment (C.02)	100
Unit 217	Help customers to choose products in a retail environment (C.03)	105
Unit 218	Carry out promotional campaigns in a retail environment (C.04)	108
Unit 219	Deal with customer queries and complaints in a retail environment (C.05)	111
Unit 220	Demonstrate products to customers in a retail environment (C.06)	114
Unit 221	Process payments for purchases in a retail environment (C.08)	117
Unit 222	Process applications for credit agreements offered in a retail environment (C.09)	119
Unit 223	Promote loyalty schemes to customers in a retail environment (C.12)	122
Unit 224	Provide a bra fitting service in a retail environment (C.17)	125
Unit 225	Follow guidelines for planning and preparing visual merchandising displays (C.18)	129
Unit 226	Dress visual merchandising displays to attract customers (C.19)	132
Unit 227	Order and position signage and graphics for visual merchandising displays (C.20)	135
Unit 228	Dismantle and store props and graphics from visual merchandising displays (C.21)	138
Unit 229	Make props and decorate fixtures and panels for visual merchandising displays (C.22)	141
Unit 230	Assemble visual merchandising displays (C.23)	144
Unit 231	Follow point-of-sale procedures for age-restricted products in a retail environment (C.36)	147
Unit 232	Provide National Lottery products to customers (C.37)	149
Unit 233	Advise customers on the fixing and care of tiles (C.42)	152
Unit 234	Cash up in a retail environment (C.46)	155
Unit 235	Promote a retail store's credit card to customers in a retail environment (C.47)	157
Unit 236	Provide service to customers in a dressing room in a retail environment (C.48)	159
Unit 237	Promote food or drink products by offering samples to customers (C.49)	162
Unit 238	Deliver goods from a retail environment to the customer's delivery address (C.50)	165
Unit 239	Help customers to apply for a retail store's credit card and associated insurance products (C.52)	168
Unit 240	Help customers to choose delicatessen products in a retail environment (C.54)	172
Unit 241	Portion delicatessen products to meet customer requirements in a retail environment (C.55)	174
Unit 243	Demonstrate make-up and skincare products to customers at a beauty counter in a retail environment (C.59)	177
Unit 244	Operate a customer record card system on a beauty counter in a retail environment (C.60)	181
Unit 245	Protect own and others' health and safety when working in a retail environment (E.06)	184

Unit 246	Reduce security risks in a retail environment (E.07)	187
Unit 248	Prepare newspapers and magazines for return to merchandisers (E.20)	189
Unit 249	Check the accuracy of records of hours worked in a retail environment (E.22)	192
Unit 250	Give customers a positive impression of yourself and your organisation (D.01)	195
Unit 253	Hand divide, mould and shape fermented dough (B.19)	198
Unit 254	Select, weigh and measure bakery ingredients (B.18)	200
Unit 255	Identify and report the presence of pests, diseases and disorders (B.34)	203
Unit 256	Maintain moisture levels for crops or plants (B.31)	206
Unit 257	Merchandise plants and other relevant products (C.56)	209
Unit 258	Provide nutrients to crops or plants (B.32)	212
Unit 259	Remove unwanted plant growth to maintain development (B.33)	215
Appendix 1	Units for which simulated activities are allowed	219
Appendix 2	Units from which expert witness testimony is allowed if the assessor is not expert	220
Appendix 3	Skillscan	222
Appendix 4	Summary of City & Guilds assessment policies	225

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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 1 Award Certificate Diploma in Retail Skills (7384-10/11/12)**. It contains forms you can use to record your evidence of what you have done.

There are 67 units in total available in this qualification. 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 1 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 1 Award in Retail Skills, learners must achieve a minimum of **7** credits from the optional units available.

City & Guilds unit	Unit title	GLH	Credit value
	Optional		
101	Move goods and materials manually in a retail environment (B.01)	16	3
102	Keep stock at required levels in a retail environment (B.02)	16	3
103	Sort donated goods for resale or recycling in a retail environment (B.08)	6	3
104	Maintain food safety while working with food in a retail environment (B.20)	11	5
105	Load orders for despatch from a retail store to customers (B.29)	15	3
106	Wrap and pack goods for customers in a retail environment (C.01)	18	3
107	Contribute to monitoring and maintaining ease of shopping in a retail sales area (C.51)	8	2
108	Recognise and report security risks in a retail environment (E.01)	26	4
109	Comply with workplace health and safety requirements in a retail environment (E.02)	28	5
111	Keep the non-food retail environment clean and tidy (E.04)	16	3
112	Provide a counter and takeaway service (C.44)	30	3

To achieve the Level 1 Certificate in Retail Skills, learners must achieve a minimum of **19** credits.

- **7** credits must come from the mandatory unit 110
- A minimum of **5** credits must come from the optional level 1 units
- A maximum of **7** credits can come from the optional level 2 units
- Overall at least **12** credits must be achieved at level 1.

City & Guilds unit	Unit title	GLH	Credit value
Mandatory group			
110	Work effectively in a retail team (E.03)	7	35
Optional			
101	Move goods and materials manually in a retail environment (B.01)	3	16
102	Keep stock at required levels in a retail environment (B.02)	3	16
103	Sort donated goods for resale or recycling in a retail environment (B.08)	3	6
104	Maintain food safety while working with food in a retail environment (B.20)	5	11
105	Load orders for despatch from a retail store to customers (B.29)	3	15
106	Wrap and pack goods for customers in a retail environment (C.01)	3	18
107	Contribute to monitoring and maintaining ease of shopping in a retail sales area (C.51)	2	8
108	Recognise and report security risks in a retail environment (E.01)	4	26
109	Comply with workplace health and safety requirements in a retail environment (E.02)	5	28
111	Keep the non-food retail environment clean and tidy (E.04)	3	16
112	Provide a counter and takeaway service	3	30
201	Receive goods and materials into storage in a retail environment (B.03)	4	22
202	Place goods and materials into storage in a retail environment (B.04)	4	19
203	Keep stock on sale at required levels in a retail environment (B.05)	3	16
204	Process customer orders for goods in a retail environment (B.06)	3	19
205	Process returned goods in a retail environment (B.07)	3	18
206	Assemble products for display in a retail environment (B.09)	2	9
207	Hand-process fish in a retail environment (B.11)	6	21
208	Process greengrocery products for sale in a retail environment (B.12)	7	17
211	Maintain food safety while working with food in a retail environment (B.21)	6	13
212	Pick products in a retail environment to fulfil customer orders (B.28)	4	19

City & Guilds unit	Unit title	GLH	Credit value
213	Check stock levels and sort out problems with stock levels in a retail environment (B.30)	10	2
214	Finish bake-off food products in a retail environment (B.35)	15	3
215	Glaze, coat or decorate bake-off products for sale in a retail environment (B.36)	15	3
216	Display stock to promote sales to customers in a retail environment (C.02)	26	5
217	Help customers to choose products in a retail environment (C.03)	20	6
218	Carry out promotional campaigns in a retail environment (C.04)	18	4
219	Deal with customer queries and complaints in a retail environment (C.05)	24	4
220	Demonstrate products to customers in a retail environment (C.06)	15	3
221	Process payments for purchases in a retail environment (C.08)	17	4
222	Process applications for credit agreements offered in a retail environment (C.09)	25	5
223	Promote loyalty schemes to customers in a retail environment (C.12)	11	3
225	Follow guidelines for planning and preparing visual merchandising displays (C.18)	22	5
226	Dress visual merchandising displays to attract customers (C.19)	35	7
227	Order and position signage and graphics for visual merchandising displays (C.20)	15	3
228	Dismantle and store props and graphics from visual merchandising displays (C.21)	15	3
230	Assemble visual merchandising displays (C.23)	20	4
231	Follow point-of-sale procedures for age-restricted products in a retail environment (C.36)	11	2
232	Provide National Lottery products to customers (C.37)	25	4
233	Advise customers on the fixing and care of tiles (C.42)	35	6
234	Cash up in a retail environment (C.46)	9	2
235	Promote a retail store's credit card to customers in a retail environment (C.47)	12	3
236	Provide service to customers in a dressing room in a retail environment (C.48)	16	3
237	Promote food or drink products by offering samples to customers (C.49)	13	2
238	Deliver goods from a retail environment to the customer's delivery address (C.50)	17	3
239	Help customers to apply for a retail store's credit card and associated insurance products (C.52)	22	4
240	Help customers to choose delicatessen products in a retail environment (C.54)	15	3

City & Guilds unit	Unit title	GLH	Credit value
241	Portion delicatessen products to meet customer requirements in a retail environment (C.55)	9	2
243	Demonstrate make-up and skincare products to customers at a beauty counter in a retail environment (C.59)	15	4
244	Operate a customer record card system on a beauty counter in a retail environment (C.60)	8	2
245	Protect own and others' health and safety when working in a retail environment (E.06)	28	5
246	Reduce security risks in a retail environment (E.07)	25	5
248	Prepare newspapers and magazines for return to merchandisers (E.20)	10	2
249	Check the accuracy of records of hours worked in a retail environment (E.22)	17	4
250	Give customers a positive impression of yourself and your organisation (D.01)	33	5
253	Hand divide, mould and shape fermented dough (B.19)	21	4
254	Select, weigh and measure bakery ingredients (B.18)	16	3
255	Identify and report the presence of pests, diseases and disorders (B.34)	23	2
256	Maintain moisture levels for crops or plants (B.31)	15	2
257	Merchandise plants and other relevant products (C.56)	45	6
258	Provide nutrients to crops or plants (B.32)	15	2
259	Remove unwanted plant growth to maintain development (B.33)	38	5

To achieve the Level 1 Diploma in Retail Skills, learners must achieve a minimum of **37** credits.

- **7** credits must come from the mandatory unit 110
- A minimum of **15** credits must come from the optional level 1 units
- A maximum of **15** credits can come from the optional level 2 units
- Overall at least **22** credits must be achieved at level 1.

City & Guilds unit	Unit title	GLH	Credit value
Mandatory group			
110	Work effectively in a retail team (E.03)	35	7
Optional			
101	Move goods and materials manually in a retail environment (B.01)	16	3
102	Keep stock at required levels in a retail environment (B.02)	16	3
103	Sort donated goods for resale or recycling in a retail environment (B.08)	6	3
104	Maintain food safety while working with food in a retail environment (B.20)	11	5
105	Load orders for despatch from a retail store to customers (B.29)	15	3
106	Wrap and pack goods for customers in a retail environment (C.01)	18	3
107	Contribute to monitoring and maintaining ease of shopping in a retail sales area (C.51)	8	2
108	Recognise and report security risks in a retail environment (E.01)	26	4
109	Comply with workplace health and safety requirements in a retail environment (E.02)	28	5
111	Keep the non-food retail environment clean and tidy (E.04)	16	3
112	Provide a counter and takeaway service (C.44)	30	3
201	Receive goods and materials into storage in a retail environment (B.03)	22	4
202	Place goods and materials into storage in a retail environment (B.04)	19	4
203	Keep stock on sale at required levels in a retail environment (B.05)	16	3
204	Process customer orders for goods in a retail environment (B.06)	19	3
205	Process returned goods in a retail environment (B.07)	18	3
206	Assemble products for display in a retail environment (B.09)	9	2
207	Hand-process fish in a retail environment (B.11)	21	6
208	Process greengrocery products for sale in a retail environment (B.12)	17	7
209	Finish meat products by hand in a retail environment (B.13)	29	9
210	Organise own work to meet a dough production schedule in a retail environment (B.17)	48	10
211	Maintain food safety while working with food in a retail environment (B.21)	13	6
212	Pick products in a retail environment to fulfil customer orders (B.28)	19	4

City & Guilds unit	Unit title	GLH	Credit value
213	Check stock levels and sort out problems with stock levels in a retail environment (B.30)	10	2
214	Finish bake-off food products in a retail environment (B.35)	15	3
215	Glaze, coat or decorate bake-off products for sale in a retail environment (B.36)	15	3
216	Display stock to promote sales to customers in a retail environment (C.02)	26	5
217	Help customers to choose products in a retail environment (C.03)	20	6
218	Carry out promotional campaigns in a retail environment (C.04)	18	4
219	Deal with customer queries and complaints in a retail environment (C.05)	24	4
220	Demonstrate products to customers in a retail environment (C.06)	15	3
221	Process payments for purchases in a retail environment (C.08)	17	4
222	Process applications for credit agreements offered in a retail environment (C.09)	25	5
223	Promote loyalty schemes to customers in a retail environment (C.12)	11	3
224	Provide a bra fitting service in a retail environment (C.17)	44	10
225	Follow guidelines for planning and preparing visual merchandising displays (C.18)	22	5
226	Dress visual merchandising displays to attract customers (C.19)	35	7
227	Order and position signage and graphics for visual merchandising displays (C.20)	15	3
228	Dismantle and store props and graphics from visual merchandising displays (C.21)	15	3
229	Make props and decorate fixtures and panels for visual merchandising displays (C.22)	45	10
230	Assemble visual merchandising displays (C.23)	20	4
231	Follow point-of-sale procedures for age-restricted products in a retail environment (C.36)	11	2
232	Provide National Lottery products to customers (C.37)	25	4
233	Advise customers on the fixing and care of tiles (C.42)	35	6
234	Cash up in a retail environment (C.46)	9	2
235	Promote a retail store's credit card to customers in a retail environment (C.47)	12	3
236	Provide service to customers in a dressing room in a retail environment (C.48)	16	3
237	Promote food or drink products by offering samples to customers (C.49)	13	2
238	Deliver goods from a retail environment to the customer's delivery address (C.50)	17	3
239	Help customers to apply for a retail store's credit card and associated insurance products (C.52)	22	4

City & Guilds unit	Unit title	GLH	Credit value
240	Help customers to choose delicatessen products in a retail environment (C.54)	15	3
241	Portion delicatessen products to meet customer requirements in a retail environment (C.55)	9	2
243	Demonstrate make-up and skincare products to customers at a beauty counter in a retail environment (C.59)	15	4
244	Operate a customer record card system on a beauty counter in a retail environment (C.60)	8	2
245	Protect own and others' health and safety when working in a retail environment (E.06)	28	5
246	Reduce security risks in a retail environment (E.07)	25	5
248	Prepare newspapers and magazines for return to merchandisers (E.20)	10	2
249	Check the accuracy of records of hours worked in a retail environment (E.22)	17	4
250	Give customers a positive impression of yourself and your organisation (D.01)	33	5
253	Hand divide, mould and shape fermented dough (B.19)	21	4
254	Select, weigh and measure bakery ingredients (B.18)	16	3
255	Identify and report the presence of pests, diseases and disorders (B.34)	23	0
256	Maintain moisture levels for crops or plants (B.31)	15	2
257	Merchandise plants and other relevant products (C.56)	45	6
258	Provide nutrients to crops or plants (B.32)	15	2
259	Remove unwanted plant growth to maintain development (B.33)	38	5

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. See Appendix for list of units where simulation is allowed.

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.

Unit 101

Move goods and materials manually in a retail environment (B.01)

3 credits

Outcome 1 Be able to move goods and materials manually in a retail environment

Assessment criteria (Performance)	Evidence date					
The learner can:	Portfolio reference					
1.1 perform checks to ensure that equipment needed to move goods and materials is available and in working order						
1.2 state what can go wrong with the equipment used for moving goods and materials						
1.3 move and handle goods and materials safely and in line with organisational procedures						
1.4 place goods and materials:						
• in the specified places						
• within the time allowed						
• in such a way that they can be easily identified and reached						
Type of evidence →						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Outcome 2 Know the importance of rotating stock when putting new stock into storage

Assessment criteria (Knowledge)	Portfolio reference	
The learner can:		
2.1 state the importance of rotating stock when putting new stock into storage		
Type of evidence →		
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

Outcome 3 Know what support is available to resolve problems with moving goods and materials manually

Assessment criteria (Knowledge) The learner can:	Portfolio reference	
3.1 identify the person to whom to report faulty equipment		
3.2 identify the people who can help to move goods and materials when necessary		
3.3 identify the person who can be asked for advice about where to place goods and materials		
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 102

Keep stock at required levels in a retail environment (B.02)

3 credits

Outcome 1 Know the importance of checking stock levels

Assessment criteria (Knowledge) The learner can:	Portfolio reference	
1.1 state the importance of accurate and up to date stock checks and records		
1.2 state the importance of following instructions and procedures for checking stock levels		
	Type of evidence →	
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

Outcome 2 Know the importance of rotating stock when putting new stock on display

Assessment criteria (Knowledge) The learner can:	Portfolio reference	
2.1 outline the importance of rotating stock when putting new stock on display		
	Type of evidence →	
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

Outcome 3 Know the risks involved in handling stock

Assessment criteria (Knowledge) The learner can:	Portfolio reference	
3.1 outline potential safety risks involved in handling stock		
3.2 outline how stock, premises and equipment can be damaged by poor stock handling		
3.3 state why the work area needs to be cleaned and tidied promptly after replenishing stock levels		
	Type of evidence →	
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

Outcome 4 Be able to move goods and materials manually in a retail environment

Assessment criteria (Performance)	Evidence date					
The learner can:	Portfolio reference					
4.1 perform checks on existing stock levels in such a way that:						
<ul style="list-style-type: none"> • an accurate count of stock is achieved 						
<ul style="list-style-type: none"> • instructions and organisational procedures are followed 						
<ul style="list-style-type: none"> • unsaleable stock is identified 						
<ul style="list-style-type: none"> • other people are not disturbed except when necessary 						
4.2 identify the person who can provide advice when instructions for checking stock are not clear						
4.3 identify the person who needs to be told about any unsaleable stock identified						
4.4 update stock records accurately and in line with organisational procedures						
Type of evidence →						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Outcome 5 Be able to position stock in a retail environment

Assessment criteria (Performance)	Evidence date					
The learner can:	Portfolio reference					
5.1 position stock in the right places according to instructions relating to:						
<ul style="list-style-type: none"> • stock rotation 						
<ul style="list-style-type: none"> • display requirements 						
5.2 identify the person who can provide advice when instructions for positioning stock are not clear						
5.3 handle stock in ways that:						
<ul style="list-style-type: none"> • protect own and other people's safety 						
<ul style="list-style-type: none"> • protect stock, equipment and premises from being damaged 						
<ul style="list-style-type: none"> • do not disturb other people except when necessary 						
5.4 clean and tidy the work area after replenishing stock levels in line with organisational procedures						
Type of evidence →						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Unit 102

Keep stock at required levels in a retail environment (B.02)



Declaration

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Assessor Name:	
Assessor Signature:	
Date:	

IV Name:	
IV Signature:	
Date:	

Unit 103

Sort donated goods for resale or recycling in a retail environment (B.08)

3 credits

Outcome 1 Know how to sort donated goods safely

Assessment criteria (Knowledge) The learner can:	Portfolio reference
1.1 outline the organisational safety requirements that apply to sorting donated goods	
Type of evidence →	
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report	

Outcome 2 Be able to sort donated goods for selling or recycling

Assessment criteria (Performance) The learner can:	Evidence date					
	Portfolio reference					
2.1 clean and tidy the work area before starting to sort goods						
2.2 sort donated goods by type and condition						
2.3 identify the person who can help with recognising and classifying unusual items						
2.4 place goods suitable for recycling in the designated containers						
2.5 follow organisational procedures for disposing of items that are not suitable for either selling or recycling						
2.6 place containers in the designated location ready for collection						
2.7 follow organisational requirements for protecting own health and safety when processing donated goods						
2.8 clean and tidy the work area after sorting goods						
Type of evidence →						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Unit 103

Sort donated goods for resale or recycling in a retail environment (B.08)



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Unit 104

Maintain food safety while working with food in a retail environment (B.20)

5 credits

Outcome 1 Know how own personal hygiene and behaviour contribute to food safety in a retail environment

Assessment criteria (Knowledge) The learner can:	Portfolio reference	
1.1 outline how clean hair, skin, nails and clothing contribute to food safety		
1.2 state how jewellery and other accessories can put food safety at risk		
1.3 state why unsafe behaviour must be avoided when working with or near food		
1.4 state why any open wounds, skin infections and infectious illnesses must be reported		
1.5 state the importance of ensuring that any open wounds and skin infections are treated and covered with a suitable dressing		
	Type of evidence →	
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

Outcome 2 Know how to deal with indicators of potential food safety hazards in a retail environment

Assessment criteria (Knowledge) The learner can:	Portfolio reference	
2.1 outline the types of indicators of potential food safety hazards to remain alert for in own workplace		
2.2 outline how to recognise indicators of potential food safety hazards in own workplace		
2.3 state which indicators of potential food safety hazards are within own authority to deal with, and which indicators must be reported		
2.4 outline the organisational procedures for dealing with indicators of potential food safety hazards that are within own authority		
	Type of evidence →	
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

Outcome 3 Be able to keep self and clothes clean while working with food in a retail environment

Assessment criteria (Performance)	Evidence date					
The learner can:	Portfolio reference					
3.1 keep own hair, skin, nails and clothing in a suitable condition for working with food						
3.2 remove any jewellery and other accessories that could cause food safety hazards						
3.3 ensure that any protective clothing the organisation provides for own use is:						
• worn in line with organisational requirements						
• changed when the organisation says it should be						
3.4 wash own hands:						
• at the right times to keep them in a suitable condition for working with food						
• using effective methods						
3.5 demonstrate safe behaviour that helps prevent contamination to the food being worked with						
3.6 identify the person to whom to report any open wounds, skin infections and infectious illnesses						
Type of evidence →						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Outcome 4 Be able to deal with indicators of potential food safety hazards in a retail environment

Assessment criteria (Performance)	Evidence date					
The learner can:	Portfolio reference					
4.1 identify obvious indicators of potential food safety hazards in the workplace						
4.2 deal with potential food safety hazards by:						
• removing them when authorised to do so						
• reporting them to the right person when dealing with them is not within own authority						
Type of evidence →						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

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Date:	

IV Name:	
IV Signature:	
Date:	

Unit 105

Load orders for despatch from a retail store to customers (B.29)

3 credits

Outcome 1 Know why it is important to work safely in the loading area

Assessment criteria (Knowledge) The learner can:	Portfolio reference	
1.1 state the importance of keeping the loading area free of obstacles, litter and spillages		
1.2 state how regular equipment checks help to ensure safety in the loading area		
Type of evidence →		
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

Outcome 2 Know how own working practices contribute to an efficient delivery service

Assessment criteria (Knowledge) The learner can:	Portfolio reference	
2.1 state the importance of checking the information on order labels		
2.2 state how the positioning of orders in the vehicle helps the delivery process to run smoothly and efficiently		
Type of evidence →		
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

Outcome 3 Be able to keep loading facilities and equipment in a usable condition

Assessment criteria (Performance)	Evidence date					
The learner can:	Portfolio reference					
3.1 perform checks on the loading area for obstacles, litter and spillages						
3.2 remove any obstacles, litter and spillages from the loading area						
3.3 perform checks to ensure that loading equipment is fit for use						
3.4 clean loading equipment in line with organisational procedures						
3.5 repair loading equipment in line with organisational procedures and when authorised to do so						
Type of evidence →						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Outcome 4 Be able to ensure that orders are ready for loading

Assessment criteria (Performance)	Evidence date					
The learner can:	Portfolio reference					
4.1 perform checks to ensure that orders are labelled with all the required information						
4.2 perform checks to ensure that orders are placed in the designated areas ready for loading						
Type of evidence →						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Outcome 5 Be able to load orders into delivery vehicles

Assessment criteria (Performance)	Evidence date					
The learner can:	Portfolio reference					
5.1 lift and move packed orders in ways that attempt to prevent:						
• injury to self and others						
• damage to goods and property						
5.2 position orders in a vehicle according to:						
• instructions for the required order of delivery						
• organisational procedures for keeping goods secure and protected from damage during transit						
Type of evidence →						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

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IV Signature:	
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Unit 106

Wrap and pack goods for customers in a retail environment (C.01)

3 credits

Outcome 1 Know about the types of packaging that can be used in a retail environment

Assessment criteria (Knowledge) The learner can:	Portfolio reference	
1.1 outline any legal requirements relating to the types of packaging provided to customers in own workplace		
1.2 outline the organisation's policy relating to the types of packaging provided to customers		
1.3 outline the ways in which goods can be damaged if protective packaging is not used		
	Type of evidence →	
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

Outcome 2 Know the importance of minimising and disposing of waste in a retail environment

Assessment criteria (Knowledge) The learner can:	Portfolio reference	
2.1 outline why wastage needs to be kept to a minimum		
2.2 state the importance of disposing of waste materials promptly		
	Type of evidence →	
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

Outcome 3 Be able to package goods for customers in a retail environment

Assessment criteria (Performance)	Evidence date					
The learner can:	Portfolio reference					
3.1 choose packaging materials that:						
• meet legal requirements and organisational policy						
• are suitable for the goods						
3.2 package goods, ensuring that:						
• they are protected from damage during packaging						
• wastage is kept to a minimum						
• tools are used safely						
• packages are closed and sealed in line with organisational instructions						
3.3 identify the designated person to ask for advice if instructions are not clear						
3.4 store materials and tools in the designated places and in line with organisational procedures after use						
3.5 dispose of waste materials in the designated containers						
Type of evidence →						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

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Unit 107

Contribute to monitoring and maintaining ease of shopping in a retail sales area (C.51)

2 credits

Outcome 1 Know how the layout and appearance of the sales floor influences sales

Assessment criteria (Knowledge) The learner can:	Portfolio reference	
1.1 state how the layout and appearance of the sales floor influence sales		
Type of evidence →		
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

Outcome 2 Be able to maintain own area of the sales floor during trading hours

Assessment criteria (Performance)	Evidence date					
The learner can:	Portfolio reference					
2.1 keep own work area clean, tidy and free from obstructions						
2.2 ensure that merchandise meets organisational standards for positioning and presentation						
2.3 remove unsaleable merchandise from the sales floor						
2.4 ensure that information concerning prices, products and promotions is visible to customers						
2.5 ensure that own activities on the sales floor minimise disruption to customers						
Type of evidence →						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Outcome 3 Be able to report problems that could have a negative effect on the customer experience

Assessment criteria (Performance)	Evidence date					
The learner can:	Portfolio reference					
3.1 report to the designated person problems that could have a negative effect on the customer experience						
Type of evidence →						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Unit 107

Contribute to monitoring and maintaining ease of shopping in a retail sales area (C)



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IV Name:	
IV Signature:	
Date:	

Unit 108

Recognise and report security risks in a retail environment (E.01)

3 credits

Outcome 1 Know why it is important to keep own work area secure

Assessment criteria (Knowledge) The learner can:	Portfolio reference	
1.1 outline what can happen, to people and to the organisation, if own work area is not kept secure		
1.2 state the importance of reporting security risks promptly		
Type of evidence →		
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

Outcome 2 Know security risks associated with a retail environment

Assessment criteria (Knowledge) The learner can:	Portfolio reference	
2.1 outline security risks that can arise in a retail environment		
2.2 identify situations that can lead to reduced alertness for security risks		
Type of evidence →		
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

Outcome 3 Be able to report security risks in a retail environment

Assessment criteria (Performance)	Evidence date					
The learner can:	Portfolio reference					
3.1 identify potential security risks in own workplace						
3.2 report security risks to the designated person						
3.3 outline the importance of not exceeding own level of authority when faced with security risks						
Type of evidence →						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

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Unit 109

Comply with workplace health and safety requirements in a retail environment (E.02)

5 credits

Outcome 1 Know types and causes of accidents and emergencies in a retail environment

Assessment criteria (Knowledge) The learner can:	Portfolio reference	
1.1 identify types of accidents and emergencies that can arise in a retail environment		
1.2 outline causes of accidents and emergencies that can arise in a retail environment		
	Type of evidence →	
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

Outcome 2 Know how own behaviour contributes to health and safety in a retail environment

Assessment criteria (Knowledge) The learner can:	Portfolio reference	
2.1 state the importance of acting within the limits of own responsibility and authority when accidents and emergencies arise, including reasons relating to personal safety and legal requirements		
2.2 state the importance of following health and safety procedures		
2.3 state the importance of planning the route before moving goods		
2.4 outline the importance of using safe techniques for lifting and handling in relation to:		
• own safety		
• the safety of others who are helping with lifting		
• the safety of others who are close by		
2.5 state when it is necessary to ask others for help with lifting		
	Type of evidence →	
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

Outcome 3 Be able to follow organisational procedures in the event of accidents and emergencies in a retail environment

Assessment criteria (Performance)	Evidence date					
The learner can:	Portfolio reference					
3.1 identify potential situations that constitute accidents and emergencies						
3.2 seek immediate help from an appropriate source in the event of accidents and emergencies						
3.3 follow immediately instructions given by senior staff and/or the emergency services in relation to accidents and emergencies						
Type of evidence →						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Outcome 4 Be able to work safely in own role within a retail environment

Assessment criteria (Performance)	Evidence date					
The learner can:	Portfolio reference					
4.1 carry out own work duties in line with:						
<ul style="list-style-type: none"> organisational procedures for reducing health and safety risks 						
<ul style="list-style-type: none"> legal requirements for reducing health and safety risks 						
4.2 use safety equipment in line with the manufacturer's instructions						
4.3 identify the person who can provide advice about working safely						
Type of evidence →						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Outcome 5 Be able to lift and handle goods safely in a retail environment

Assessment criteria (Performance)	Evidence date					
The learner can:	Portfolio reference					
5.1 lift and handle goods:						
<ul style="list-style-type: none"> using organisational procedures for lifting and handling goods 						
<ul style="list-style-type: none"> using any lifting and handling equipment in line with the organisation's and/or manufacturer's guidelines 						
<ul style="list-style-type: none"> checking that any equipment to be used is in working order 						
<ul style="list-style-type: none"> asking others to help when necessary 						
Type of evidence →						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

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Unit 110

Work effectively in a retail team (E.03)

7 credits

Outcome 1 Know about discrimination, bullying and harassment in own work place

Assessment criteria (Knowledge) The learner can:	Portfolio reference	
1.1 outline how own employer defines discrimination		
1.2 outline own employer's procedures for dealing with discrimination		
Type of evidence →		
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

Outcome 2 Be able to work as part of a retail team

Assessment criteria (Performance)	Evidence date					
The learner can:	Portfolio reference					
2.1 state the importance of asking for help and information from colleagues when needed						
2.2 ask colleagues politely for the help and information needed to do own work						
2.3 state the importance of responding positively whenever possible to colleagues' requests for help						
2.4 respond to colleagues' requests for help and information:						
• when own workload allows						
• within the limits of own responsibility						
• in ways that attempt to maintain working relationships						
2.5 identify the people who can provide advice if working with colleagues proves to be difficult						
2.6 state the importance of always following organisational instructions for safeguarding own and others' health and safety at work						
2.7 follow organisational instructions for safeguarding own and others' health and safety at work						
Type of evidence →						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Outcome 3 Know how to follow plans and procedures for learning to do own job

Assessment criteria (Knowledge) The learner can:	Portfolio reference	
3.1 state the importance of being an effective learner at work		
3.2 state the importance of planning own learning, including the use of action points and deadlines		
3.3 state the importance of requesting help to resolve problems with own training		
3.4 identify the learning activities to be undertaken, including the specific action points and deadlines in own training programme		
3.5 identify the people who can be approached for help with any problems relating to own training programme		
Type of evidence →		
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

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Unit 111

Keep the non-food retail environment clean and tidy (E.04)

3 credits

Outcome 1 Know about health and safety aspects of cleaning and tidying work surfaces in a non-food retail environment

Assessment criteria (Knowledge) The learner can:	Portfolio reference	
1.1 identify potential health and safety risks posed by:		
• cleaning equipment and materials, both in use and in storage		
• spillages		
• litter and waste		
1.2 outline the health and safety legislation relating to routine cleaning of a non-food retail environment, including dealing with spillages and disposing of waste and litter		
	Type of evidence →	
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

Outcome 2 Know the importance of cleaning with consideration for others in a non-food retail environment

Assessment criteria (Knowledge) The learner can:	Portfolio reference	
2.1 state the importance of minimising disturbance to other people when cleaning a non-food retail environment		
	Type of evidence →	
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

Outcome 3 Know the importance of personal hygiene and tidiness in a non-food retail environment

Assessment criteria (Knowledge) The learner can:	Portfolio reference	
3.1 state the importance of maintaining personal hygiene in a non-food retail environment		
3.2 state how a clean and tidy appearance can help to give customers a positive impression of self and the organisation		
	Type of evidence →	
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

Outcome 4 Be able to clean and tidy work surfaces in a non-food retail environment

Assessment criteria (Performance)	Evidence date					
The learner can:	Portfolio reference					
4.1 use equipment and materials to clean and tidy work surfaces in a non-food retail environment in line with organisational procedures						
4.2 follow organisational procedures for safe working practices while cleaning and tidying work surfaces in a non-food retail environment including:						
<ul style="list-style-type: none"> positioning items so that they do not constitute a hazard 						
<ul style="list-style-type: none"> keeping the risk of spillages to a minimum 						
<ul style="list-style-type: none"> cleaning up any spillages 						
<ul style="list-style-type: none"> disposing of rubbish and waste safely 						
4.3 clean work surfaces in ways that attempt to minimise disturbance to other people						
4.4 perform checks to ensure that work surfaces are thoroughly clean						
4.5 store cleaning equipment and materials in line with organisational procedures when cleaning is finished						
4.6 dispose of used cleaning products in line with organisational procedures						
Type of evidence →						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Outcome 5 Be able to maintain own personal hygiene in a non-food retail environment

Assessment criteria (Performance)	Evidence date					
The learner can:	Portfolio reference					
5.1 use protective clothing for performing own duties in line organisational procedures						
5.2 keep own hair, skin and nails clean for performing own duties						
Type of evidence →						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

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Unit 112

Provide a counter and takeaway service (C.44)

3 credits

Outcome 1 Be able to serve customers at the counter

Assessment criteria (Performance)	Evidence date					
The learner can:	Portfolio reference					
1.1 give customers information that meets their needs, and promotes organisations' products and service						
1.2 find out what customers require, and if necessary tell them about any waiting time						
1.3 process the order promptly						
1.4 serve food and drink items at the recommended temperature, using clean, hygienic and undamaged service equipment of the appropriate type						
1.5 make sure there are appropriate condiments and accompaniments available for customers						
Type of evidence →						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Outcome 2 Know how to serve customers at the counter

Assessment criteria (Knowledge)	Portfolio reference	
The learner can:		
2.1 describe safe and hygienic working practices for serving customers and why these are important		
2.2 state why it is important to use separate serving equipment for each food item		
2.3 state why portions must be controlled when serving customers		
2.4 state why food and drink items must be served at the correct temperature		
2.5 state why information given to customers must be accurate		
2.6 outline the types of unexpected situations that may occur when serving customers and how to deal with them		
Type of evidence →		
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

Outcome 3 Be able to maintain counter and service areas

Assessment criteria (Performance)	Evidence date					
The learner can:	Portfolio reference					
3.1 keep work area tidy, hygienic and free from rubbish and food debris during service						
3.2 maintain enough stock of clean service items						
3.3 restock with food and drink items when necessary						
3.4 display and store food and drink items in line as required						
3.5 clear work area of used and non- required service items at the appropriate times						
3.6 dispose of rubbish, used disposable items and food waste as required						
Type of evidence →						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Outcome 4 Know how to maintain counter and service areas

Assessment criteria (Knowledge)	Portfolio reference	
The learner can:		
4.1 describe safe and hygienic working practices for clearing and why these are important		
4.2 state why food which is prepared first should be served first		
4.3 state why counter preparation areas and dining areas must be kept tidy and free from rubbish and food debris throughout the service		
4.4 state why waste must be handled and disposed of correctly		
4.5 state why a constant stock of service items should be maintained		
4.6 state why maintaining food at the correct temperature is important and how this can be ensured		
4.7 outline the types of unexpected situations that may occur when clearing away and how to deal with them		
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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IV Signature:	
Date:	

Unit 201

Receive goods and materials into storage in a retail environment (B.03)

4 credits

Outcome 1 Understand the importance of preparing for expected deliveries

Assessment criteria (Knowledge) The learner can:	Portfolio reference	
1.1 explain why it is necessary to prepare thoroughly to receive deliveries		
1.2 explain why any shortage of storage space needs to be reported promptly		
1.3 explain why accurate, complete and up-to-date records are needed for deliveries		
1.4 explain how adequate preparation helps to ensure that the health and safety requirements relating to deliveries are met		
	Type of evidence →	
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

Outcome 2 Understand own responsibility for handling goods and materials

Assessment criteria (Knowledge) The learner can:	Portfolio reference	
2.1 explain the importance of handling goods and materials safely, hygienically and in ways that protect them from damage		
	Type of evidence →	
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

Outcome 3 Be able to prepare to receive deliveries in a retail environment

Assessment criteria (Performance)	Evidence date					
The learner can:	Portfolio reference					
3.1 identify:						
• the quantity of the items expected						
• the nature of the items expected						
• the storage space needed						
3.2 perform checks to ensure that enough storage space is available for expected deliveries						
3.3 identify the person to report any shortage of storage space to						
3.4 perform checks to ensure that the receiving area is clean, tidy and free from obstructions and hazards						
3.5 perform checks to ensure that the necessary handling equipment is available and is in good working order						
3.6 perform checks to ensure that the relevant records are complete, accurate and up to date						
Type of evidence →						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Outcome 4 Be able to receive deliveries into storage in a retail environment

Assessment criteria (Performance)	Evidence date					
The learner can:	Portfolio reference					
4.1 perform checks to ensure that the type, quantity and quality of items delivered are acceptable						
4.2 describe how to refuse faulty deliveries, including how to record these and who needs to know about them						
4.3 use methods that are safe, hygienic and protect the items from damage to check deliveries						
4.4 allow deliveries to be off-loaded only into the designated areas						
4.5 update stock control systems in line with organisational procedures						
4.6 follow legal and organisational requirements for maintaining security and safety while receiving deliveries						
Type of evidence →						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Declaration

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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

Place goods and materials into storage in a retail environment (B.04)

4 credits

Outcome 1 Understand the requirements for storing goods and materials in a retail environment

Assessment criteria (Knowledge) The learner can:	Portfolio reference	
1.1 explain what might cause the goods and materials to deteriorate in storage		
1.2 describe the types of storage facilities and storage conditions that are needed for the goods and materials		
1.3 outline the legal and organisational requirements for storing goods and materials safely and securely		
1.4 explain why stock needs to be rotated in storage		
	Type of evidence →	
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

Outcome 2 Know procedures for resolving problems with storage facilities and equipment

Assessment criteria (Knowledge) The learner can:	Portfolio reference	
2.1 describe the procedures for reporting any lack of suitable storage facilities		
2.2 describe how to fix faulty equipment when this falls within own responsibility		
2.3 describe the procedures for reporting equipment faults that are not within own responsibility to fix		
	Type of evidence →	
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

Outcome 3 Be able to place goods and materials into storage in a retail environment

Assessment criteria (Performance)	Evidence date					
The learner can:	Portfolio reference					
3.1 perform checks to ensure that adequate storage facilities are available						
3.2 perform checks to ensure that handling equipment is in working order						
3.3 place goods and materials:						
• safely and securely						
• in the designated storage facilities						
• within the time allowed						
• in ways that make efficient use of the available storage space						
• in ways that enable items to be reached easily when needed						
3.4 complete relevant records in line with organisational procedures						
Type of evidence →						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

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IV Name:	
IV Signature:	
Date:	

Unit 203

Keep stock on sale at required levels in a retail environment (B.05)

3 credits

Outcome 1 Understand the relationship between stock levels and demand for stock

Assessment criteria (Knowledge) The learner can:	Portfolio reference	
1.1 explain the importance of having enough stock in the store to meet demand		
1.2 describe the factors that can affect demand for stock		
	Type of evidence →	
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

Outcome 2 Understand the relationship between stock levels and the quality of stock on sale

Assessment criteria (Knowledge) The learner can:	Portfolio reference	
2.1 explain how stock rotation reduces the risk that stock will become unsaleable		
2.2 describe the signs that stock is no longer saleable		
	Type of evidence →	
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

Outcome 3 Be able to check the level of stock on sale in a retail environment

Assessment criteria (Performance)	Evidence date					
The learner can:	Portfolio reference					
3.1 calculate when to check stock levels, taking into account:						
• expected demand for stock						
• the time needed to order replacement stock						
3.2 use the organisation’s stock control system to assess:						
• current stock levels,						
• the stock levels needed						
• any shortfalls in stock						
3.3 describe the procedures for informing colleagues that stock needs replacing						
Type of evidence →						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Outcome 4 Be able to replenish stock on sale in a retail environment

Assessment criteria (Performance)	Evidence date					
The learner can:	Portfolio reference					
4.1 order stock as needed to maintain required levels						
4.2 prepare stock for sale within the time allowed						
4.3 arrange for stock to be moved to the sales floor as needed						
4.4 rotate stock:						
• in accordance with organisational procedures						
• with the least possible disturbance to other people						
4.5 dispose of packaging waste in accordance with organisational procedures						
4.6 update the stock control system in line with organisational procedures to reflect:						
• stock movements						
• any disposal of unsalable stock						
4.7 calculate expected changes in demand and the corresponding changes that need to be made to stock levels						
Type of evidence →						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

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Unit 204

Process customer orders for goods in a retail environment (B.06)

3 credits

Outcome 1 Understand the importance of customer service in relation to processing customers' orders

Assessment criteria (Knowledge) The learner can:	Portfolio reference	
1.1 explain the importance of giving customers clear, accurate and complete information about the terms of supply		
1.2 explain the importance of keeping customers informed of the progress of their orders		
	Type of evidence →	
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

Outcome 2 Understand the correct use of customer information in relation to processing customers' orders

Assessment criteria (Knowledge) The learner can:	Portfolio reference	
2.1 describe the information that must be obtained from customers when they place orders		
2.2 explain why information is needed from customers when they place orders, including any information that is required by law		
2.3 outline the legal and organisational requirements relating to customer confidentiality		
2.4 explain the consequences of not keeping customer information confidential		
	Type of evidence →	
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

Outcome 3 Be able to find out what customers want to order

Assessment criteria (Performance)	Evidence date					
The learner can:	Portfolio reference					
3.1 ask questions to clarify customers' requirements						
3.2 use product information to help customers who are unsure which exact products will best meet their requirements						
Type of evidence →						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Outcome 4 Be able to check the availability of the goods customers want to order

Assessment criteria (Performance)	Evidence date					
The learner can:	Portfolio reference					
4.1 describe the available sources of supply						
4.2 check the availability of goods and the terms and conditions of supply						
4.3 offer alternative options to customers if the required goods are not currently in stock						
Type of evidence →						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

Outcome 5 Be able to process orders for customers

Assessment criteria (Performance)	Evidence date					
The learner can:	Portfolio reference					
5.1 check customer identity and credit status in accordance with legal and organisational procedures						
5.2 prepare accurate and complete orders using the organisation's required format						
5.3 communicate orders to those responsible for fulfilling them in line with organisational procedures						
5.4 maintain the requisite level of confidentiality when storing, using and sharing customer information						
Type of evidence →						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

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