

# Level 3 Certificate Diploma in Retail Skills (Visual Merchandising) (7384-32/35)

## Candidate logbook

600/3961/9

600/4062/2



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# Level 3 Certificate Diploma in Retail Skills (Visual Merchandising) (7384-32/35)

## Candidate logbook

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

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# 1 About your candidate logbook

## 1.1 Contact details

<b>Candidate name</b>	
<b>Candidate enrolment no</b>	
<b>Centre name</b>	
<b>Centre number</b>	
<b>Programme start date</b>	
<b>Date of registration with City &amp; Guilds</b>	

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.

<b>Your Assessor(s)</b>	
<b>Your Internal Verifier</b>	
<b>Quality Assurance Contact</b>	

# 1 About your candidate logbook

## 1.2 Introduction to the logbook

This logbook will help you complete the units in City & Guilds' **Level 3 Certificate Diploma in Retail Skills (Visual Merchandising)** (7384-32/35). It contains forms you can use to record your evidence of what you have done.

There are 17 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 3 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](http://www.cityandguilds.com)**.

## 2 Units

To achieve the Level 3 Certificate in Retail Skills (Visual Merchandising), learners must achieve a minimum of **31** credits overall. A minimum of **20** credits must be achieved at level 3, of which;

- **10** credits must come from the mandatory unit in group A
- A minimum of **10** credits must come from the level 3 optional units in group B
- A maximum of **10** credits can come from the level 2 optional units in group C

City & Guilds unit	Unit title	GLH	Credit value
	<b>Mandatory</b>		
316	Work effectively and support others in a retail organisation (E.08)	50	10
	<b>Optional</b>		
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
308	Choose merchandise to feature in visual merchandising displays (C.24)	27	6
309	Manage the use of signage and graphics in visual merchandising displays (C.25)	31	7
310	Evaluate the effectiveness of visual merchandising displays (C.26)	46	9
311	Manage budgets for visual merchandising projects (C.27)	46	10
312	Contribute to improving a retail organisation's visual merchandising policy (C.28)	36	8
313	Design visual merchandising display layouts (C.29)	46	10

To achieve the Level 3 Diploma in Retail Skills (Visual Merchandising), learners must achieve a minimum of **53** credits overall. A minimum of **43** credits must be achieved at level 3, of which;

- **10** credits must come from the mandatory unit in group A
- A minimum of **33** credits must come from the level 3 optional units in group B
- A maximum of **10** credits can come from the level 2 and 3 optional units in group C

<b>City &amp; Guilds unit</b>	<b>Unit title</b>	<b>GLH</b>	<b>Credit value</b>
<b>Mandatory group</b>			
316	Work effectively and support others in a retail organisation (E.08)	50	10
<b>Optional</b>			
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
304	Manage staff to receive goods in a retail environment (B.37)	24	5
305	Organise and monitor the storage of stock in a retail environment (B.38)	27	6
308	Choose merchandise to feature in visual merchandising displays (C.24)	27	6
309	Manage the use of signage and graphics in visual merchandising displays (C.25)	31	7
310	Evaluate the effectiveness of visual merchandising displays (C.26)	46	9
311	Manage budgets for visual merchandising projects (C.27)	46	10
312	Contribute to improving a retail organisation's visual merchandising policy (C.28)	36	8
313	Design visual merchandising display layouts (C.29)	46	10
317	Deputise for the leader of a retail team (E.09)	55	11
318	Contribute to the continuous improvement of retail operations within own area of responsibility (E.10)	47	10

### 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 225

# Follow guidelines for planning and preparing visual merchandising displays

5 credits

### Outcome 1 Understand the importance of visual merchandising displays and design briefs

<b>Assessment criteria (Knowledge)</b> <b>The learner can:</b>	<b>Portfolio reference</b>	
1.1 explain the role of visual merchandising displays in marketing, promotional and sales campaigns and activities		
1.2 explain the importance of the design brief in creating visual merchandising displays		
	Type of evidence	
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

### Outcome 2 Understand the selection of approaches and effects in visual merchandising displays

<b>Assessment criteria (Knowledge)</b> <b>The learner can:</b>	<b>Portfolio reference</b>	
2.1 explain why different approaches are needed for displays of different types of merchandise		
2.2 explain how light, colour, texture, shape and dimension combine to achieve different effects		
	Type of evidence	
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

### Outcome 3 Understand the sourcing of merchandise and props to be featured in visual merchandising displays

<b>Assessment criteria (Knowledge)</b> <b>The learner can:</b>	<b>Portfolio reference</b>	
3.1 explain how to use a design brief to identify the items needed for a display		
3.2 explain how different types of merchandise and props can attract customers' attention		
3.3 explain the importance of updating stock records to account for merchandise on display		
	Type of evidence	
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

## Outcome 4 Be able to plan visual merchandising displays to fulfil a design brief

Assessment criteria (Performance)	Evidence date					
<b>The learner can:</b>	<b>Portfolio reference</b>					
4.1 select display locations that enable the design brief to be fulfilled						
4.2 create ideas for improving the visual effect of displays, ensuring such ideas:						
<ul style="list-style-type: none"> <li>create the required effect</li> </ul>						
<ul style="list-style-type: none"> <li>are within the limits of the design brief</li> </ul>						
are within the limits of the organisation's visual design policies						
Type of evidence						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

## Outcome 5 Be able to source merchandise and props to be featured in visual merchandising displays

Assessment criteria (Performance)	Evidence date					
<b>The learner can:</b>	<b>Portfolio reference</b>					
5.1 agree alternative selections of merchandise and props with the designated person, when those originally specified are unavailable or unsuitable						
5.2 agree arrangements with suppliers for delivery of merchandise and props						
5.3 plan enough time for deliveries of merchandise and props to arrive before the display must be installed						
5.4 check the progress of deliveries of merchandise and props						
5.5 take action to resolve the situation when delays to deliveries of merchandise and props seem likely						
5.6 update stock records to account for merchandise on display						
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.

<b>Candidate Name:</b>	
<b>Candidate Signature:</b>	
<b>Date:</b>	

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.

<b>Assessor Name:</b>	
<b>Assessor Signature:</b>	
<b>Date:</b>	

<b>IV Name:</b>	
<b>IV Signature:</b>	
<b>Date:</b>	

## Unit 226

## Dress visual merchandising displays to attract customers

7 credits

### Outcome 1 Understand the purpose of visual merchandising displays

<b>Assessment criteria (Knowledge)</b> <b>The learner can:</b>	<b>Portfolio reference</b>	
1.1 explain the different purposes of visual merchandising displays		
1.2 explain how visual merchandising displays can achieve add-on sales		
1.3 explain why add-on sales are important to the organisation		
	Type of evidence	
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

### Outcome 2 Understand how visual merchandising displays achieve their intended purposes

<b>Assessment criteria (Knowledge)</b> <b>The learner can:</b>	<b>Portfolio reference</b>	
2.1 explain the importance of visual merchandising displays in retail environments		
2.2 explain the importance of being aware of trends relating to visual merchandising		
2.3 explain how props, prototypes, dressings and fixtures create visual effects within displays		
2.4 explain why different kinds of merchandise need different approaches to display		
	Type of evidence	
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

### Outcome 3 Be able to dress in-store displays and window displays

Assessment criteria (Performance)	Evidence date					
The learner can:	Portfolio reference					
3.1 position merchandise, signage and graphics within displays:						
<ul style="list-style-type: none"> <li>in ways that attract the attention and interest of target customers</li> </ul>						
<ul style="list-style-type: none"> <li>to provide the information that customers need</li> </ul>						
<ul style="list-style-type: none"> <li>in line with organisational visual merchandising guidelines</li> </ul>						
3.2 group merchandise within displays in ways that suit:						
<ul style="list-style-type: none"> <li>the purpose of the display</li> </ul>						
<ul style="list-style-type: none"> <li>the style of the display</li> </ul>						
<ul style="list-style-type: none"> <li>the intended focal points of the display</li> </ul>						
<ul style="list-style-type: none"> <li>the angles from which customers will view the display</li> </ul>						
<ul style="list-style-type: none"> <li>the selling features of the merchandise</li> </ul>						
<ul style="list-style-type: none"> <li>the visual effect specified by the design brief</li> </ul>						
3.3 assess whether the display's lighting meets the design brief in achieving the required visual effects and atmosphere						
3.4 check that the finished display meets organisational requirements for:						
<ul style="list-style-type: none"> <li>health and safety</li> </ul>						
<ul style="list-style-type: none"> <li>security</li> </ul>						
<ul style="list-style-type: none"> <li>easy access</li> </ul>						
3.5 seek permission from the designated person to change displays when this is not within own authority						
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.

<b>Candidate Name:</b>	
<b>Candidate Signature:</b>	
<b>Date:</b>	

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.

<b>Assessor Name:</b>	
<b>Assessor Signature:</b>	
<b>Date:</b>	

<b>IV Name:</b>	
<b>IV Signature:</b>	
<b>Date:</b>	

## Unit 227

# Order and position signage and graphics for visual merchandising displays

3 credits

### Outcome 1 Understand the role of signage and graphics within visual merchandising

Assessment criteria (Knowledge) The learner can:	Portfolio reference	
1.1 explain the purpose of signage in visual merchandising		
1.2 explain how signage can contribute to the effectiveness of visual merchandising		
1.3 explain the purpose of graphics in visual merchandising		
1.4 explain how graphics can contribute to the effectiveness of visual merchandising		
Type of evidence		
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

### Outcome 2 Be able to promote products to customers as part of a promotional campaign

Assessment criteria (Performance)	Evidence date					
The learner can:	Portfolio reference					
2.1 describe to suppliers the signage and graphics required by the design brief						
2.2 order signage and graphics:						
• within the required timescales						
• within the available budget						
• from suppliers who have confirmed they can meet the specified requirements						
2.3 monitor the progress of orders for signage and graphics						
2.4 assess signage and graphics when these are delivered, to ensure they meet the agreed requirements						
Type of evidence						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

### Outcome 3 Be able to position signage and graphics to support visual merchandising

Assessment criteria (Performance)	Evidence date					
The learner can:	Portfolio reference					
3.1 position signage and graphics in accordance with:						
• the design brief						
• any house styles that apply						
• any branding requirements that apply						
• organisational policy on signage						
• legal requirements						
• the display's intended visual effect and message						
• organisational safety requirements						
3.2 the need for signage and graphics to remain securely attached						
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.

<b>Candidate Name:</b>	
<b>Candidate Signature:</b>	
<b>Date:</b>	

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.

<b>Assessor Name:</b>	
<b>Assessor Signature:</b>	
<b>Date:</b>	

<b>IV Name:</b>	
<b>IV Signature:</b>	
<b>Date:</b>	

## Unit 228

# Dismantle and store props and graphics from visual merchandising displays

3 credits

### Outcome 1 Understand the importance of storing props and graphics for future use in visual merchandising displays

Assessment criteria (Knowledge) The learner can:	Portfolio reference	
1.1 explain the importance of labelling props and graphics before leaving them in storage		
1.2 explain why records must be kept of props and graphics in storage		
1.3 explain why props and graphics must be stored securely		
Type of evidence		
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

### Outcome 2 Be able to dismantle visual merchandising displays

Assessment criteria (Performance)	Evidence date					
<b>The learner can:</b>	<b>Portfolio reference</b>					
2.1 dismantle displays using working practices that:						
<ul style="list-style-type: none"> <li>comply with organisational health and safety requirements</li> </ul>						
<ul style="list-style-type: none"> <li>attempt to protect the components of the display from being damaged</li> </ul>						
2.2 return merchandise to the designated places in line with organisational procedures						
2.3 dispose of unwanted items from the dismantled display in line with organisational procedures						
2.4 keep records of the movement and disposal of items from dismantled displays in line with organisational procedures						
2.5 clean display sites and components:						
<ul style="list-style-type: none"> <li>in line with organisational procedures</li> </ul>						
<ul style="list-style-type: none"> <li>using equipment and materials suited to the task</li> </ul>						
Type of evidence						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

### Outcome 3 Be able to store props and graphics from dismantled visual merchandising displays

Assessment criteria (Performance)	Evidence date					
The learner can:	Portfolio reference					
3.1 assess the space required for props and graphics that are to be put into storage						
3.2 store props and graphics:						
• in line organisational procedures						
• in secure but accessible places						
• in ways that do not pose a health and safety risk						
3.3 keep up-to-date storage records in line with organisational procedures						
3.4 report any damaged and/or missing props and graphics in line with organisational procedures						
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.

<b>Candidate Name:</b>	
<b>Candidate Signature:</b>	
<b>Date:</b>	

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.

<b>Assessor Name:</b>	
<b>Assessor Signature:</b>	
<b>Date:</b>	

<b>IV Name:</b>	
<b>IV Signature:</b>	
<b>Date:</b>	

## Unit 229

# Make props and decorate fixtures and panels for visual merchandising displays

10 credits

### Outcome 1 Understand the purpose of props within visual merchandising displays

Assessment criteria (Knowledge) The learner can:	Portfolio reference	
1.1 explain the visual effects that can be achieved with life size and scale models		
1.2 explain why it is necessary to decorate panels and fixtures in creative ways		
1.3 explain how decorated panels and fixtures contribute to visual effects		
1.4 explain why different kinds of merchandise need different approaches to decoration		
Type of evidence		
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

### Outcome 2 Be able to specify requirements for visual merchandising props

Assessment criteria (Performance)	Evidence date					
The learner can:	Portfolio reference					
2.1 produce specifications for visual merchandising props that:						
<ul style="list-style-type: none"> <li>meet the design brief</li> </ul>						
<ul style="list-style-type: none"> <li>are achievable within budget and timescales</li> </ul>						
<ul style="list-style-type: none"> <li>specify the type, size and function of the props needed</li> </ul>						
<ul style="list-style-type: none"> <li>specify whether props can be obtained ready made or need to be made to order</li> </ul>						
<ul style="list-style-type: none"> <li>include plans for obtaining the props</li> </ul>						
Type of evidence						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

### Outcome 3 Be able to make props for use in visual merchandising displays

Assessment criteria (Performance)	Evidence date					
<b>The learner can:</b>	<b>Portfolio reference</b>					
3.1 select techniques, materials, tools and equipment that are suited to making the props specified in the design brief						
3.2 produce final versions of props, ensuring they:						
<ul style="list-style-type: none"> <li>follow the requirements of the design brief</li> </ul>						
<ul style="list-style-type: none"> <li>follow organisational health and safety requirements</li> </ul>						
<ul style="list-style-type: none"> <li>are finished within the required timescales</li> </ul>						
Type of evidence						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

### Outcome 4 Be able to decorate fixtures and panels for visual merchandising displays

Assessment criteria (Performance)	Evidence date					
<b>The learner can:</b>	<b>Portfolio reference</b>					
4.1 select decorative techniques and materials that:						
<ul style="list-style-type: none"> <li>attempt to create the visual effect required by the design brief</li> </ul>						
<ul style="list-style-type: none"> <li>are within cost limits</li> </ul>						
4.2 use tools, equipment and materials for decorative work in line with organisational procedures						
4.3 produce finished decorative work that:						
<ul style="list-style-type: none"> <li>is free from faults</li> </ul>						
<ul style="list-style-type: none"> <li>has the visual impact required by the design brief</li> </ul>						
<ul style="list-style-type: none"> <li>is consistent with the design brief</li> </ul>						
<ul style="list-style-type: none"> <li>is completed within required timescales</li> </ul>						
Type of evidence						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

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<b>IV Signature:</b>	
<b>Date:</b>	

## Unit 230

## Assemble visual merchandising displays

4 credits

### Outcome 1 Understand the purpose of layout design

<b>Assessment criteria (Knowledge)</b> <b>The learner can:</b>	<b>Portfolio reference</b>	
1.1 explain what layout design is		
1.2 explain the role of layout design in effective visual design practice		
	Type of evidence	
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

### Outcome 2 Know how to interpret instructions for assembling visual merchandising displays

<b>Assessment criteria (Knowledge)</b> <b>The learner can:</b>	<b>Portfolio reference</b>	
2.1 describe the essential features and detailed requirements of display layouts as specified in plans		
2.2 describe organisational health and safety and security arrangements needed for displays as specified in plans		
2.3 describe potential problems with assembling displays		
	Type of evidence	
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

### Outcome 3 Be able to assemble visual merchandising displays

Assessment criteria (Performance)	Evidence date					
The learner can:	Portfolio reference					
3.1 plan the activities and resources needed to assemble displays as specified in plans, elevations and drawings						
3.2 assemble displays in line with:						
<ul style="list-style-type: none"> <li>organisational guidelines provided</li> </ul>						
<ul style="list-style-type: none"> <li>agreed deadlines</li> </ul>						
<ul style="list-style-type: none"> <li>organisational health and safety requirements</li> </ul>						
3.3 make adjustments to assembled displays to achieve creative effects within limits of own authority and the guidelines provided						
3.4 take actions to resolve problems that arise when assembling displays, within the guidelines provided						
Type of evidence						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

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<b>Date:</b>	

## Unit 304

## Manage staff to receive goods in a retail environment (B.37)

5 credits

### Outcome 1 Be able to manage staff to receive and check incoming deliveries of goods in a retail environment

Assessment criteria (Performance)	Evidence date					
<b>The learner can:</b>	<b>Portfolio reference</b>					
1.1 select sufficient staff to prepare for, receive and check expected incoming deliveries of goods						
1.2 explain to staff, in advance of deliveries of goods arriving:						
<ul style="list-style-type: none"> <li>what needs to be done to prepare the receiving area</li> </ul>						
<ul style="list-style-type: none"> <li>what needs to happen when the expected deliveries arrive</li> </ul>						
1.3 assess whether the area for receiving goods has been adequately prepared to ensure safe and secure unloading of goods						
1.4 assess whether there is enough storage space of the right type for the expected goods						
1.5 ensure that goods are unloaded safely and securely						
1.6 explain why incoming goods should be checked against requirements immediately after unloading						
1.7 ensure that incoming goods are checked against requirements immediately after unloading						
1.8 ensure that delivery records are completed in line with organisational procedures						
1.9 evaluate records of deliveries of goods to determine whether each supplier has met the organisation's service needs						
1.10 resolve problems with deliveries of goods in line with organisational procedures						
Type of evidence <input type="checkbox"/>						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R = Report						

## Unit 304

## Manage staff to receive goods in a retail environment (B.37)

### Declaration

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## Unit 305

## Organise and monitor the storage of stock in a retail environment (B.38)

6 credits

### Outcome 1 Understand the causes and prevention of stock loss within storage systems

Assessment criteria (Knowledge) The learner can:	Portfolio reference	
1.1 explain the causes of stock deterioration, loss and damage		
1.2 explain how to reduce stock loss within storage systems		
Type of evidence <input type="checkbox"/>		
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R = Report		

### Outcome 2 Understand the legal and organisational requirements for storing stock

Assessment criteria (Knowledge) The learner can:	Portfolio reference	
2.1 explain the legal and organisational requirements for storing stock, including health and safety requirements and the removal of out-of-date stock		
Type of evidence <input type="checkbox"/>		
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R = Report		

### Outcome 3 Be able to organise the use of storage facilities in a retail environment

Assessment criteria (Performance)	Evidence date					
The learner can:	Portfolio reference					
3.1 organise storage facilities to take account of:						
• day-to-day work						
• safety requirements						
• the need to keep stock secure						
• the need to keep stock in a saleable condition						
3.2 train staff to use the storage system:						
• securely						
• safely						
• in line with relevant legal requirements						

3.3 assign staff clear roles and responsibilities for storing and moving stock						
3.4 develop plans to cope with unforeseen storage problems that take account of available resources						
3.5 review plans for coping with unforeseen storage problems						
3.6 revise plans to cope with unforeseen storage problems, taking account of any relevant factors						
3.7 monitor storage operations to ensure that staff are storing and moving stock:						
• securely						
• safely						
• in line with relevant legal requirements						
• 3.8 maintain stock records that are in line with organisational procedures						
Type of evidence <input type="checkbox"/>						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

#### **Outcome 4 Be able to monitor the storage and care of stock in a retail environment**

<b>Assessment criteria (Performance)</b>	<b>Evidence date</b>					
<b>The learner can:</b>	<b>Portfolio reference</b>					
4.1 maintain a routine that meets the organisation's requirements for checking the quality of storage facilities and stock						
4.2 perform spot checks of storage facilities and stock						
4.3 train staff to:						
• identify stock that is out of date or at risk of deteriorating						
• deal with stock that is out of date or at risk of deteriorating in line with legal requirements and organisational procedures						
4.4 monitor the storage and movement of stock to make sure that stock is reaching the shop floor as it is needed						
4.5 recommend to decision makers ways of running storage and stock movement systems more profitably						
Type of evidence <input type="checkbox"/>						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

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## Unit 308

## Choose merchandise to feature in visual merchandising displays (C.24)

6 credits

### Outcome 1 Understand the purpose of featuring merchandise in visual merchandising displays

Assessment criteria (Knowledge) The learner can:	Portfolio reference	
1.1 explain the role of displays featuring merchandise in marketing, promotional and sales campaigns and activities		
1.2 explain the importance of being creative when selecting merchandise for displays		
Type of evidence <input type="checkbox"/>		
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

### Outcome 2 Be able to evaluate merchandise for its display potential

Assessment criteria (Performance)	Evidence date					
<b>The learner can:</b>	<b>Portfolio reference</b>					
2.1 evaluate the suitability of different items of merchandise for featuring in a display, with respect to:						
• the purpose of the display						
• the potential of the merchandise to attract and interest customers						
• whether the merchandise to be featured is consistent with the organisation's visual display policy						
• the availability of the merchandise within the timescale for preparing the display						
• the cost of obtaining the merchandise in relation to the budget available for the display						
Type of evidence <input type="checkbox"/>						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

**Outcome 3 Be able to liaise with decision makers concerning the merchandise to be featured in a display**

Assessment criteria (Performance)	Evidence date					
<b>The learner can:</b>	<b>Portfolio reference</b>					
3.1 explain to decision makers:						
<ul style="list-style-type: none"> <li>the reasons for the choice of merchandise for display</li> </ul>						
<ul style="list-style-type: none"> <li>how the merchandise would feature in the display</li> </ul>						
3.2 reach an agreement with decision makers concerning the choice of merchandise before work starts on assembling the display						
3.3 reach agreement with decision makers concerning arrangements and timescales for the supply of merchandise						
Type of evidence <input type="checkbox"/>						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

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<b>Date:</b>	

## Unit 309

## Manage the use of signage and graphics in visual merchandising displays (C.25)

7 credits

### Outcome 1 Understand how signage and graphics are used in visual merchandising displays

Assessment criteria (Knowledge) The learner can:	Portfolio reference	
1.1 explain how the look of signage and graphics in visual merchandising displays can attract customers		
1.2 explain how signage and graphics are used in visual merchandising displays to convey information to customers		
	Type of evidence <input type="checkbox"/>	
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

### Outcome 2 Understand the importance of complying with legal requirements relating to the use of signage and graphics in visual merchandising

Assessment criteria (Knowledge) The learner can:	Portfolio reference	
2.1 explain the importance of complying with legal requirements relating to the use of signage and graphics in visual merchandising displays		
	Type of evidence <input type="checkbox"/>	
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

### Outcome 3 Understand the importance of monitoring the use of signage and graphics in visual merchandising displays

Assessment criteria (Knowledge) The learner can:	Portfolio reference	
3.1 explain the importance of monitoring the use of signage and graphics in visual merchandising displays to ensure that they are being used as intended		
	Type of evidence <input type="checkbox"/>	
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

## Outcome 4 Be able to assess the signage and graphics needed for visual merchandising displays

Assessment criteria (Knowledge) The learner can:	Portfolio reference	
4.1 assess the types and quantities of signage and graphics that will best:		
• suit the purpose of the display		
• meet legal requirements		
• comply with the organisation's visual design policy		
4.2 confirm with decision makers that proposals for the use of signage and graphics are acceptable		
Type of evidence <input type="checkbox"/>		
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

## Outcome 5 Be able to source the signage and graphics needed for visual merchandising displays

Assessment criteria (Performance)	Evidence date					
<b>The learner can:</b>	<b>Portfolio reference</b>					
5.1 confirm with suppliers:						
• the type of signage and graphics needed						
• quantities						
• costs						
• delivery dates						
• delivery arrangements						
5.2 assess whether the signage and graphics received from suppliers meet specified requirements before they are used						
Type of evidence <input type="checkbox"/>						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

## Outcome 6 Be able to co-ordinate the use of signage and graphics in visual merchandising

Assessment criteria (Performance)	Evidence date					
<b>The learner can:</b>	<b>Portfolio reference</b>					
6.1 distribute signage and graphics by the deadlines agreed in the design brief to those who are responsible for putting them on display						
6.2 explain to colleagues how they should install signage and graphics to meet the design brief						
6.3 check that signage and graphics are installed in line with specifications						
Type of evidence <input type="checkbox"/>						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

## Outcome 7 Be able to monitor the use of signage and graphics in visual merchandising

Assessment criteria (Performance)	Evidence date					
<b>The learner can:</b>	<b>Portfolio reference</b>					
7.1 perform checks on visual merchandising displays to ensure that signage and graphics are still being used as intended						
7.2 request feedback from colleagues on the use of signage and graphics on display						
7.3 take corrective action when signage and graphics are not being used in line with organisational procedures or the design brief						
Type of evidence <input type="checkbox"/>						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

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## Unit 310

## Evaluate the effectiveness of visual merchandising displays (C.26)

6 credits

### Outcome 1 Understand the types of evidence used to evaluate the effectiveness of visual merchandising displays

Assessment criteria (Knowledge) The learner can:	Portfolio reference	
1.1 explain the importance of evaluating the effectiveness of visual merchandising displays		
1.2 explain when the effectiveness of visual merchandising displays should be evaluated		
1.3 explain which types of information are the most useful for evaluating the effectiveness of visual merchandising displays		
1.4 explain the meaning of 'validity' and 'reliability' in relation to the measurement of customers' responses to visual merchandising displays		
Type of evidence <input type="checkbox"/>		
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

### Outcome 2 Be able to gather information about customers' responses to visual merchandising displays

Assessment criteria (Performance)	Evidence date					
<b>The learner can:</b>	<b>Portfolio reference</b>					
2.1 research customers' responses to visual merchandising displays, ensuring that the information gathered is:						
• valid						
• reliable						
• gathered in line with organisation's communications policy						
• gathered in ways that attempt to maintain the goodwill and co operation of those providing the information						
Type of evidence <input type="checkbox"/>						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

### Outcome 3 Be able to analyse information from customers' responses to evaluate the effectiveness of visual merchandising displays

Assessment criteria (Performance)	Evidence date					
<b>The learner can:</b>	<b>Portfolio reference</b>					
3.1 agree the standards for evaluating the effect of visual merchandising displays with decision makers						
3.2 analyse the evidence of the effectiveness of visual merchandising displays fairly against the agreed standards						
3.3 evaluate the effectiveness of visual merchandising displays in terms of:						
• the purpose of the display						
• customers' responses to it						
3.4 recommend to decision makers improvements that could be made to the way visual merchandising is carried out in the store, based on the research findings and conclusions						
Type of evidence <input type="checkbox"/>						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

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## Unit 311

## Manage budgets for visual merchandising projects (C.27)

10 credits

### Outcome 1 Understand the importance of controlling expenditure on visual merchandising projects

Assessment criteria (Knowledge) The learner can:	Portfolio reference	
1.1 explain the importance to the organisation of controlling expenditure on visual merchandising projects		
Type of evidence <input type="checkbox"/>		
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

### Outcome 2 Understand the concept of 'value for money' when managing visual merchandising projects

Assessment criteria (Knowledge) The learner can:	Portfolio reference	
2.1 explain what 'value for money' means when managing visual merchandising project		
2.2 explain why 'value for money' does not just mean paying the lowest prices		
Type of evidence <input type="checkbox"/>		
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

### Outcome 3 Be able to agree costs with decision makers for visual merchandising projects

Assessment criteria (Performance)	Evidence date					
The learner can:	Portfolio reference					
3.1 calculate estimates of the costs of proposed visual merchandising projects						
3.2 prepare business cases for visual merchandising project budgets that show how value for money will be achieved						

3.3 present budget proposals to decision makers in ways that attempt to persuade them to adopt the proposals						
3.4 negotiate budgets with decision makers in ways that attempt to keep them committed to the project's aims						
Type of evidence <input type="checkbox"/>						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

#### Outcome 4 Be able to control costs for visual merchandising projects

Assessment criteria (Performance)	Evidence date					
<b>The learner can:</b>	<b>Portfolio reference</b>					
4.1 explain to colleagues the cost limits they must work within on visual merchandising projects						
4.2 maintain accurate records of project expenditure in line with organisational procedures						
4.3 identify unacceptable discrepancies in project expenditure						
4.4 take action to resolve any discrepancies in project expenditure when this falls within own authority						
4.5 report unacceptable discrepancies in project costs to the designated person when resolving such discrepancies is not within own authority						
4.6 identify areas where value for money could have been improved within budget limits for the project						
Type of evidence <input type="checkbox"/>						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

#### Outcome 5 Be able to keep colleagues informed on expenditure on visual merchandising projects

Assessment criteria (Performance)	Evidence date					
<b>The learner can:</b>	<b>Portfolio reference</b>					
5.1 keep colleagues informed on expenditure on visual merchandising projects						
Type of evidence <input type="checkbox"/>						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

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## Unit 312

## Contribute to improving a retail organisation's visual merchandising policy (C.28)

10 credits

### Outcome 1 Understand how visual merchandising and visual design can benefit an organisation

Assessment criteria (Knowledge) The learner can:	Portfolio reference	
1.1 explain how having a visual merchandising policy can help the organisation to achieve its aims		
1.2 explain how visual design can help to promote and sell goods and services		
1.3 explain what customer focused design is		
1.4 explain how customer-focused design can benefit the organisation		
Type of evidence <input type="checkbox"/>		
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

### Outcome 2 Be able to evaluate the organisation's approach to visual design

Assessment criteria (Performance) The learner can:	Evidence date					
	Portfolio reference					
2.1 research what internal and external customers want and expect from the visual design of the organisation						
2.2 analyse research findings to identify internal and external customers' wishes and expectations concerning visual design in the organisation						
2.3 evaluate whether current and recent visual designs used in the organisation meet internal and external customers' wishes and expectations						
Type of evidence <input type="checkbox"/>						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

### Outcome 3 Be able to recommend new ideas for the organisation’s visual design

Assessment criteria (Performance)	Evidence date					
<b>The learner can:</b>	<b>Portfolio reference</b>					
3.1 develop ideas for improving the organisation’s approach to visual design						
3.2 create ideas for improving the visual design of the organisation						
3.3 assess whether own design ideas are relevant to the needs of the organisation						
3.4 present visual design recommendations to decision makers						
Type of evidence <input type="checkbox"/>						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

### Outcome 4 Be able to support staff putting the organisation’s visual design policy into practice

Assessment criteria (Performance)	Evidence date					
<b>The learner can:</b>	<b>Portfolio reference</b>					
4.1 explain the organisation’s visual design policy to staff in a way that attempts to encourage understanding and commitment						
4.2 provide opportunities for staff to ask questions						
4.3 perform checks to ensure that visual designs used in the organisation are consistent with the organisation’s visual design policy						
4.4 report to own line manager any problems with implementing the visual design policy that are not within own authority to resolve						
Type of evidence <input type="checkbox"/>						
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<b>Date:</b>	

## Unit 313

## Design visual merchandising display layouts (C.29)

10 credits

### Outcome 1 Understand the importance of display layout design in visual merchandising

<b>Assessment criteria (Knowledge)</b> <b>The learner can:</b>	<b>Portfolio reference</b>	
1.1 explain what layout design is		
1.2 explain the role of layout design in visual merchandising		
1.3 explain the importance of developing creative and practical display layout ideas in visual merchandising		
	Type of evidence <input type="checkbox"/>	
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R = Report		

### Outcome 2 Understand the elements of creative layout design solutions

<b>Assessment criteria (Knowledge)</b> <b>The learner can:</b>	<b>Portfolio reference</b>	
2.1 explain how to choose and combine scale		
2.2 explain the role of dimension		
	Type of evidence <input type="checkbox"/>	
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R = Report		

### Outcome 3 Understand the importance of display layout designs to those who put layouts together

<b>Assessment criteria (Knowledge)</b> <b>The learner can:</b>	<b>Portfolio reference</b>	
3.1 explain why specifications, drawings and supporting information are needed by those who will put layouts together		
	Type of evidence <input type="checkbox"/>	
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R = Report		

## Outcome 4 Be able to develop creative ideas for display layouts

Assessment criteria (Performance)	Evidence date					
<b>The learner can:</b>	<b>Portfolio reference</b>					
4.1 assess which layout best meets the intended purpose of the display						
4.2 generate different ideas for the design of the display layout						
4.3 evaluate ideas for the design of the display layout, using relevant criteria including:						
• cost						
• the time available to prepare the display						
4.4 select the display layout idea that is most likely to achieve the required visual effect within time and cost limits						
4.5 develop the chosen display layout idea in more detail ensuring that it:						
• fulfils the precise design requirements						
• is still achievable within the available time and cost						
• will fit the available space						
• can be assembled and used safely						
4.6 reach an agreement with decision makers on the final layout						
Type of evidence <input type="checkbox"/>						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

## Outcome 5 Be able to produce guidance to enable the assembly of display layout

Assessment criteria (Performance)	Evidence date					
The learner can:	Portfolio reference					
5.1 produce a drawing of the display layout that:						
<ul style="list-style-type: none"> <li>uses visual merchandising drawing and coding conventions to give information</li> </ul>						
<ul style="list-style-type: none"> <li>specifies the dimensions and orientation of the layout</li> </ul>						
<ul style="list-style-type: none"> <li>specifies the standards of the finished layout</li> </ul>						
5.2 estimate the quantities of materials needed for specified display layouts						
5.3 estimate the costs of materials and services needed for specified display layouts, doing so:						
<ul style="list-style-type: none"> <li>within the design requirement for the layouts</li> </ul>						
<ul style="list-style-type: none"> <li>within cost limits</li> </ul>						
5.4 provide detailed information on the layout design to enable the display to be assembled safely						
Type of evidence <input type="checkbox"/>						
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.

<b>Candidate Name:</b>	
<b>Candidate Signature:</b>	
<b>Date:</b>	

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.

<b>Assessor Name:</b>	
<b>Assessor Signature:</b>	
<b>Date:</b>	

<b>IV Name:</b>	
<b>IV Signature:</b>	
<b>Date:</b>	

## Unit 316

## Work effectively and support others in a retail organisation (E.08)

10 credits

### Outcome 1 Understand how own team contributes to the success of the wider organisation

<b>Assessment criteria (Knowledge)</b> <b>The learner can:</b>	<b>Portfolio reference</b>	
1.1 explain own team's purpose, aims and targets in the context of the wider organisation		
1.2 explain the roles and responsibilities of colleagues in own team		
1.3 explain the importance of good working relations within own team		
	Type of evidence <input type="checkbox"/>	
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

### Outcome 2 Understand own role within a team in a retail environment

<b>Assessment criteria (Knowledge)</b> <b>The learner can:</b>	<b>Portfolio reference</b>	
2.1 explain own responsibility for contributing to own team's success, including helping colleagues to learn		
2.2 explain the importance of being a reliable team member		
2.3 explain the factors to take account of when making commitments, including:		
• existing workload		
• the degree to which interruptions and changes of plan are within own control		
2.4 explain the importance of implementing the organisation's policies and procedures for health and safety, including the importance of setting a good example to colleagues		
	Type of evidence <input type="checkbox"/>	
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

### Outcome 3 Understand what motivates self and colleagues in a retail environment

Assessment criteria (Knowledge) The learner can:	Portfolio reference	
3.1 explain the factors that can affect own and colleagues' motivation to carry out work in a retail environment, including skills and existing workload		
3.2 explain potential circumstances that could affect morale in a retail environment		
Type of evidence <input type="checkbox"/>		
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

### Outcome 4 Be able to support effective working within a retail team

Assessment criteria (Performance)	Evidence date					
<b>The learner can:</b>	<b>Portfolio reference</b>					
4.1 allocate work in ways that take account of own and colleagues' preferences, skills and available time						
4.2 make and keep commitments to colleagues within:						
• own team						
• the wider organisation						
4.3 agree alternative actions when it is not possible to keep commitments made to colleagues						
4.4 interact with colleagues within own team and wider organisation in ways that attempt to maintain morale						
4.5 explain to team members why it is important to treat each other fairly, politely and with respect						
4.6 implement own organisation's health and safety procedures while working						
Type of evidence <input type="checkbox"/>						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

## Outcome 5 Be able to improve own work performance in own retail team

Assessment criteria (Performance)	Evidence date					
<b>The learner can:</b>	<b>Portfolio reference</b>					
5.1 identify knowledge and skills needed to improve own work performance						
5.2 reach agreement with own line manager concerning:						
• learning and development goals						
• action points and deadlines for own learning and development						
5.3 take measures to improve own performance						
5.4 review own progress against an agreed learning and development plan, including seeking feedback from those in a position to give it						
Type of evidence <input type="checkbox"/>						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

## Outcome 6 Be able to help others to learn in a retail environment

Assessment criteria (Performance)	Evidence date					
<b>The learner can:</b>	<b>Portfolio reference</b>					
6.1 communicate to colleagues own willingness and availability to provide work-related information and advice						
6.2 provide information and advice on request to colleagues where this is within own responsibility						
6.3 provide advice and support to colleagues to help them meet the organisation's standards						
6.4 communicate procedures to colleagues in a logical sequence to help them meet the organisation's standards						
6.5 provide colleagues with opportunities to practise new skills						
6.6 provide constructive feedback to colleagues on their progress in developing new skills						
6.7 ensure that health, safety and security are not compromised when helping others to learn						
6.8 refer colleagues to specialist advice as needed to support their learning						
Type of evidence <input type="checkbox"/>						
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.

<b>Candidate Name:</b>	
<b>Candidate Signature:</b>	
<b>Date:</b>	

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.

<b>Assessor Name:</b>	
<b>Assessor Signature:</b>	
<b>Date:</b>	

<b>IV Name:</b>	
<b>IV Signature:</b>	
<b>Date:</b>	

## Unit 317

## Deputise for the leader of a retail team (E.09)

11 credits

### Outcome 1 Understand the standards of performance required of own retail team when deputising for a team leader

<b>Assessment criteria (Knowledge)</b> <b>The learner can:</b>	<b>Portfolio reference</b>	
1.1 explain team leader responsibilities in relation to:		
• health and safety		
• equality, diversity and inclusion		
• security		
• staffing levels		
• absence reporting		
• timekeeping		
• personal appearance		
• handling customer complaints		
1.2 explain relevant legislation and regulations relating to the products the team sells		
1.3 explain the importance of setting an example to team members by following organisational procedures and policies at all times		
	Type of evidence <input type="checkbox"/>	
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

### Outcome 2 Understand how to gain the co-operation of own retail team when deputising for team leader

<b>Assessment criteria (Knowledge)</b> <b>The learner can:</b>	<b>Portfolio reference</b>	
2.1 explain the challenges involved in temporarily managing peer colleagues		
2.2 explain how clear communication helps teams to work effectively		
2.3 explain why it is important for a team leader to be approachable and trustworthy, including the importance of maintaining confidentiality		
2.4 explain the importance of treating all team members fairly		
	Type of evidence <input type="checkbox"/>	
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

### Outcome 3 Be able to maintain the standards of performance of own retail team when deputising for a team leader

Assessment criteria (Performance)	Evidence date					
<b>The learner can:</b>	<b>Portfolio reference</b>					
3.1 communicate accurate information and instructions to the team						
3.2 set an example for own team by following organisational procedures and policies when deputising for a team leader						
3.3 perform checks to ensure that team members follow organisational procedures and policies						
Type of evidence <input type="checkbox"/>						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

### Outcome 4 Be able to manage the morale of own retail team when deputising for a team leader

Assessment criteria (Performance)	Evidence date					
<b>The learner can:</b>	<b>Portfolio reference</b>					
4.1 allocate work tasks to team members in ways that attempt to maintain the morale of the team						
4.2 use methods to motivate own team that are suited to individual team members' existing levels of motivation and expertise						
4.3 praise good performance both to the individuals concerned and to management						
4.4 provide support to team members who are having difficulty coping with their work, in ways suited to the individual and the situation						
4.5 communicate potentially sensitive information only to those who have a right to receive it						
Type of evidence <input type="checkbox"/>						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

## Outcome 5 Be able to manage own performance when deputising for a team leader

Assessment criteria (Performance)	Evidence date					
The learner can:	Portfolio reference					
5.1 manage own time to carry out other work duties when deputising for a team leader						
5.2 follow organisational procedures when problems arise when deputising for a team leader						
Type of evidence <input type="checkbox"/>						
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.

<b>Candidate Name:</b>	
<b>Candidate Signature:</b>	
<b>Date:</b>	

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.

<b>Assessor Name:</b>	
<b>Assessor Signature:</b>	
<b>Date:</b>	

<b>IV Name:</b>	
<b>IV Signature:</b>	
<b>Date:</b>	

## Unit 318

# Contribute to the continuous improvement of retail operations within own area of responsibility (E.10)

10 credits

### Outcome 1 Understand how own area of responsibility can contribute to the overall success of the retail organisation

<b>Assessment criteria (Knowledge)</b> <b>The learner can:</b>	<b>Portfolio reference</b>	
1.1 explain characteristics of the organisation's brand image, customer base and desired market position		
1.2 explain the relationship between the agreed performance measures for own area of responsibility and the organisation's brand image and desired market position		
1.3 explain how systems and procedures in own area of responsibility are intended to support the achievement of organisational performance measures		
1.4 explain potential causes of failure to achieve organisational performance measures in the type of retail operations carried out in own area of responsibility		
	Type of evidence <input type="checkbox"/>	
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

### Outcome 2 Understand how to motivate staff in own area of responsibility to support and contribute to the continuous improvement of retail operations

<b>Assessment criteria (Knowledge)</b> <b>The learner can:</b>	<b>Portfolio reference</b>	
2.1 explain why it is important for staff to understand the purpose and intended benefits of improvements to retail operations		
2.2 explain how own manner when explaining improvements can affect staff's response to these		
2.3 explain the importance of encouraging staff to suggest ideas for improvement to retail operations		
2.4 explain the importance of ensuring that colleagues receive the credit if their ideas are implemented		
2.5 explain the importance of showing enthusiasm and leading by example when putting improvements into practice		
	Type of evidence <input type="checkbox"/>	
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report		

**Outcome 3 Be able to evaluate achievements of organisational performance measures for retail operations within own area of responsibility**

Assessment criteria (Performance)	Evidence date					
<b>The learner can:</b>	<b>Portfolio reference</b>					
3.1 evaluate organisational performance within own area of responsibility using information that is :						
• relevant						
• reliable						
• up to date						
Type of evidence <input type="checkbox"/>						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

**Outcome 4 Be able to develop recommendations for improving the effectiveness of retail operations**

Assessment criteria (Performance)	Evidence date					
<b>The learner can:</b>	<b>Portfolio reference</b>					
4.1 develop ideas to improve the effectiveness of operations in own area of responsibility						
4.2 evaluate which ideas for improvements to the effectiveness of operations in own area of responsibility should be put forward to decision makers, based on the extent to which the ideas are:						
• consistent with the organisation’s brand image						
• consistent with organisational policy						
• achievable, given the available resources						
• beneficial to the organisation and its customers						
Type of evidence <input type="checkbox"/>						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

## Outcome 5 Be able to recommend ideas for improving the effectiveness of retail operations to decision makers

Assessment criteria (Performance)	Evidence date					
<b>The learner can:</b>	<b>Portfolio reference</b>					
5.1 present ideas to decision makers for possible improvements, doing so:						
• with supporting facts						
• acknowledging any contributions made by other people						
5.2 explain to decision makers the benefits the recommended improvements could bring						
5.3 justify to decision makers the resources needed to put improvements into practice						
5.4 clarify any aspects of the recommended improvements decision makers wish to discuss further						
Type of evidence <input type="checkbox"/>						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

## Outcome 6 Be able to contribute to the implementation of planned improvements to retail operations within own area of responsibility

Assessment criteria (Performance)	Evidence date					
<b>The learner can:</b>	<b>Portfolio reference</b>					
6.1 explain planned improvements to staff in ways that attempt to:						
• make clear the benefits of the proposed changes						
• encourage involvement in implementing proposed changes						
6.2 ensure that staff have everything they need to implement proposed changes including additional training						
6.3 seek advice and support to resolve any problems with implementing proposed changes that are not within own authority to resolve						
6.4 demonstrate to staff own commitment to achieving the benefits of proposed changes through own behaviour						
Type of evidence <input type="checkbox"/>						
O = Observation WT = Witness Testimony P = Product Q = Questioning PD = Professional Discussion R =Report						

## Unit 318

## Contribute to the continuous improvement of retail operations within own area of responsibility (E.10)



### 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.

<b>Candidate Name:</b>	
<b>Candidate Signature:</b>	
<b>Date:</b>	

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.

<b>Assessor Name:</b>	
<b>Assessor Signature:</b>	
<b>Date:</b>	

<b>IV Name:</b>	
<b>IV Signature:</b>	
<b>Date:</b>	

## Appendix 1 Units for which simulated activities are allowed

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

<b>Unit number</b>	<b>Unit title</b>	<b>UAN</b>
101	Move goods and materials manually in a retail environment (B.01)	F/503/5656
102	Keep stock at required levels in a retail environment (B.02)	J/503/5657
106	Wrap and pack goods for customers in a retail environment (C.01)	K/503/5683
108	Recognise and report security risks in a retail environment (E.01)	F/503/5723
109	Comply with workplace health and safety requirements in a retail environment (E.02)	J/503/5724
110	Work effectively in a retail team (E.03)	L/503/5725
111	Keep the non-food retail environment clean and tidy (E.04)	R/503/5726
210	Organise own work to meet a dough production schedule in a retail environment (B.17)	A/503/5672
245	Protect own and others' health and safety when working in a retail environment (E.06)	Y/503/5727
246	Reduce security risks in a retail environment (E.07)	D/503/5728
319	Manage the prevention of wastage and loss in a retail environment (E.11)	H/503/5732
321	Monitor and maintain health and safety in a retail environment (E.18)	M/503/5734

## Appendix 2 Units from which expert witness testimony is allowed if the assessor is not expert

Retail Skills units for which expert witness testimony is allowed if the assessor is not expert in the specialism covered by the unit. This list includes only Skillsmart Retail's units. For guidance on assessing imported units, please refer to the relevant sector's own assessment principles.

Unit number	Unit title	UAN
104	Maintain food safety while working with food in a retail environment (B.20)	F/503/5673
207	Hand-process fish in a retail environment (B.11)	K/503/5666
208	Process greengrocery products for sale in a retail environment (B.12)	M/503/5667
209	Finish meat products by hand in a retail environment (B.13)	T/503/5668
210	Organise own work to meet a dough production schedule in a retail environment (B.17)	A/503/5672
211	Maintain food safety while working with food in a retail environment (B.21)	J/503/5674
214	Finish bake-off food products in a retail environment (B.35)	H/503/5679
215	Glaze, coat or decorate bake-off products for sale in a retail environment (B.36)	Y/503/5680
222	Process applications for credit agreements offered in a retail environment (C.09)	F/503/5690
223	Promote loyalty schemes to customers in a retail environment (C.12)	J/503/5691
224	Provide a bra fitting service in a retail environment (C.17)	Y/503/5694
225	Follow guidelines for planning and preparing visual merchandising displays (C.18)	D/503/5695
226	Dress visual merchandising displays to attract customers (C.19)	H/503/5696
227	Order and position signage and graphics for visual merchandising displays (C.20)	K/503/5697
228	Dismantle and store props and graphics from visual merchandising displays (C.21)	M/503/5698
229	Make props and decorate fixtures and panels for visual merchandising displays (C.22)	T/503/5699
230	Assemble visual merchandising displays (C.23)	D/503/5700
232	Provide National Lottery products to customers (C.37)	L/503/5708
233	Advise customers on the fixing and care of tiles (C.42)	R/503/5709

<b>Unit number</b>	<b>Unit title</b>	<b>UAN</b>
235	Promote a retail store's credit card to customers in a retail environment (C.47)	R/503/5712
239	Help customers to apply for a retail store's credit card and associated insurance products (C.52)	M/503/5717
240	Help customers to choose delicatessen products in a retail environment (C.54)	T/503/5718
241	Portion delicatessen products to meet customer requirements in a retail environment (C.55)	A/503/5719
243	Demonstrate make-up and skincare products to customers at a beauty counter in a retail environment (C.59)	T/503/5721
244	Operate a customer record card system on a beauty counter in a retail environment (C.60)	A/503/5722
303	Monitor and help improve food safety in a retail environment (B.22)	L/503/5675
308	Choose merchandise to feature in visual merchandising displays (C.24)	H/503/5701
309	Manage the use of signage and graphics in visual merchandising displays (C.25)	K/503/5702
310	Evaluate the effectiveness of visual merchandising displays (C.26)	M/503/5703
311	Manage budgets for visual merchandising projects (C.27)	T/503/5704
312	Contribute to improving a retail organisation's visual merchandising policy (C.28)	A/503/5705
313	Design visual merchandising display layouts (C.29)	F/503/5706
314	Help customers to choose alcoholic beverages in a retail environment (C.45)	J/503/5710
320	Produce staffing schedules to help a retail team to achieve its targets (E.12)	K/503/5733

# Appendix 3 Skillscan

Activities undertaken – do you			often	Sometimes	Never	Comments/Action
225	C.18	Follow guidelines for planning and preparing visual merchandising displays				
226	C.19	Dress visual merchandising displays to attract customers				
227	C.20	Order and position signage and graphics of visual merchandising displays				
228	C.21	Dismantle and store props and graphics from visual merchandising displays				
229	C.22	Make props and decorate fixtures and panels for visual merchandising displays				
230	C.23	Assemble visual merchandising displays				
304	B.37	Manage staff to receive goods in a retail environment				
305	B.38	Organise and monitor the storage of stock in a retail environment				
308	C.24	Choose merchandise to feature in visual merchandising displays				
309	C.25	Manage the use of signage and graphics in visual merchandising displays				
310	C.26	Evaluate the effectiveness of visual merchandising displays				
311	C.27	Manage budgets for visual merchandising projects				
312	C.28	Contribute to improving a retail organisation's visual merchandising policy				
313	C.29	Design visual merchandising display layouts				
316	E.08	Work effectively and support others in a retail organisation				
317	E.09	Deputise for the leader of a retail team				
318	E.10	Contribute to the continuous improvement of retail operations within own area of responsibility				

Assessment Site .....

Candidate Signature..... Candidate Name (Print).....

Assessor Signature..... Date .....

## Appendix 4 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](http://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](http://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](http://www.cityandguilds.com) or is available from the City & Guilds Customer Relations Team or your centre.

**City & Guilds**  
Believe you can



[www.cityandguilds.com](http://www.cityandguilds.com)



## Useful contacts

### UK learners

General qualification information

T: +44 (0)844 543 0033

E: [learnersupport@cityandguilds.com](mailto:learnersupport@cityandguilds.com)

### International learners

General qualification information

T: +44 (0)844 543 0033

F: +44 (0)20 7294 2413

E: [intcg@cityandguilds.com](mailto: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](mailto: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](mailto: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](mailto: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](mailto:walledgarden@cityandguilds.com)

### Employer

Employer solutions, Mapping, Accreditation, Development Skills, Consultancy

T: +44 (0)121 503 8993

E: [business@cityandguilds.com](mailto:business@cityandguilds.com)

### Publications

Logbooks, Centre documents, Forms, Free literature

T: +44 (0)844 543 0000

F: +44 (0)20 7294 2413

If you have a complaint, or any suggestions for improvement about any of the services that City & Guilds provides, email: [feedbackandcomplaints@cityandguilds.com](mailto:feedbackandcomplaints@cityandguilds.com)

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