



Technical and Vocational Education and Training (TVET) Council



**Occupational Standards
of Competence**

Marketing Merchandise

Level 2

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Qualification Overview

NVQB

in

Marketing Merchandise

Level 2

NVQ in Marketing Merchandise – Level 2

Qualification Overview

The NVQB Marketing Merchandise Level 2 is designed to allow persons to develop the required knowledge and skills for employment and/or career progression in the marketing sector. It allows candidates to progress into employment or onto the NVQB in Marketing Level 3.

Like all NVQs, this qualification is competence based. This means that it is linked to a candidates' ability to competently perform a range of tasks connected with their work. Candidates must plan a programme of development and assessment with their assessor and compile a portfolio of evidence to prove that they are competent in their work role.

Who is the qualification for?

This qualification is aimed at persons who are undertaking a range of activities which could include collecting market research data, analysing competitor activity, contributing to marketing campaigns, planning and organising an event or exhibition and using a range of digital technologies.

Jobs within the occupational sector:

- Marketing Merchandiser
- Brand Merchandiser
- Marketing Assistant
- Market Research Assistant
- Events Management Assistant

A09502 - APPROVED NATIONAL VOCATIONAL QUALIFICATION STRUCTURE

MARKETING MERCHANDISE - LEVEL 2

To achieve the full qualification, candidates must complete **all thirteen(13) units**.

<u>Mandatory Units (All must be completed)</u>	<u>CODES</u>
1. Contribute to the protection of the environment	U68402
1.1 Work in an environmentally conscious way	
1.2 Contribute to continuous improvements in protecting the environment	
2. Practise health, safety, security and hygiene	U54902
2.1 Follow health, safety and security practices	
2.2 Deal with emergency situations	
2.3 Follow hygiene procedures	
2.4 Identify and prevent hygiene risks	
3. Develop personal performance through delivering customer service	U84902
3.1 Review performance	
3.2 Prepare and maintain a personal development plan	
3.3 Undertake developmental activities	
4. Participate in workplace communication	U53802
4.1 Gather and convey workplace information	
4.2 Participate in workplace meetings and discussions	
4.3 Complete work related documents	
5. Maintain stock control	UA32902
5.1 Identify inventory and stock control systems	
5.2 Maintain stock levels	
5.3 Organise cyclical stock counts and report discrepancies or variances	
5.4 Produce reports on record keeping and inventory functions	
6. Pick and process merchandise orders	UA33002
6.1 Identify order picking processes, policies and procedures	
6.2 Pick and dispatch an order	
6.3 Record stock levels	

<u>Mandatory Units (All must be completed)</u>		<u>CODES</u>
7.	Identify marketing opportunities	UA33102
	7.1 Confirm business needs	
	7.2 Identify market needs	
	7.3 Identify marketing opportunities	
8.	Create and maintain visual merchandising displays	UA33202
	8.1 Interpret a visual merchandising plan	
	8.2 Monitor display requirements	
	8.3 Maintain displays to organisation requirements and plan	
	8.4 Contribute to the visual merchandising standards of the organisation	
9.	Undertake merchandising activities	UA33302
	9.1 Confirm daily roles and responsibilities	
	9.2 Prepare for merchandising activities	
	9.3 Prepare a pick list	
	9.4 Display goods	
	9.5 Interact with customers	
	9.6 Participate in housekeeping activities	
	9.7 Provide feedback	
10.	Provide marketing and promotion programme support	UA33402
	10.1 Confirm promotional and marketing activities	
	10.2 Respond to enquiries on promotional and marketing activities	
	10.3 Support marketing and promotional programmes	
11.	Collect and organise market research data	UA33502
	11.1 Collect market research data	
	11.2 Organise market research data	
	11.3 Use information technology to manage market research data	
12.	Use digital and social media in marketing campaigns	UA33602
	12.1 Plan the requirements for the use of digital and social media	
	12.2 Use digital technology for social media marketing purposes	
13.	Support the co-ordination of a marketing event	UA33702
	13.1 Identify roles in supporting the co-ordination of a marketing event	
	13.2 Prepare for event staging	
	13.3 Support the co-ordination of a marketing event	
	13.4 Provide feedback on event operations	

U68402**Contribute to the protection of the environment**

Unit Descriptor:

This unit deals with the knowledge, skills and attitudes required to conduct work activities in a manner that protects the environment. Candidates should take steps to minimise any negative impact on the environment by completing tasks and activities in a way which causes as little damage or disturbance as possible to the environment while following organisational procedures.

ELEMENT**PERFORMANCE CRITERIA**

To be competent you must achieve the following:

- | | |
|--|---|
| 1. Work in an environmentally conscious way | 1.1 Perform duties in accordance with relevant policies and legislation .

1.2 Execute duties in a manner which minimises environmental damage .

1.3 Operate and handle equipment and materials in a manner that minimises environmental damage . |
| 2. Contribute to continuous improvements in protecting the environment | 2.1 Identify instances of likely or actual environmental damage and take appropriate action.

2.2 Identify improvements to procedures and practices in terms of good environmental practice and report to relevant persons.

2.3 Dispose of hazardous and non-hazardous waste safely according to approved legislative procedures and practices.

2.4 Contribute to sustainable development particularly in the conservation of energy, water, use of resources and equipment to minimise environmental damage. |

RANGE STATEMENT

All range statements must be assessed:

1. Relevant policies and legislation:

- Organisational policies
- Health and safety at work
- Environmental legislation
- Solid waste management policies
- Recyclable policies

2. Manner which minimises environmental damage:

- Using recycled/reused items and materials where appropriate
- Disposing of polluting substances safely
- Reducing the volume of waste
- Using biodegradable and eco-friendly chemicals
- Planning tasks to reduce the use of fuel and electricity

3. Equipment and materials

- Hand tools
- Power tools
- Personal protective equipment
- Cleaning chemicals
- Soaps and sanitisers
- Paper towels
- Garbage disposal bags
- Cloths and towels
- Containers
- Access equipment

4. Hazardous waste:

- Oils
- Chemicals and solutions
- Harmful materials (asbestos, fibreglass)
- Electronic equipment
- Organic hazards (pest excrement, pest carcasses)

5. Non-hazardous waste:

- Food
- Plant matter
- Paper

UNDERPINNING KNOWLEDGE AND SKILLS

You need to know and understand:

1. What are the relevant policies and legislation governing environmental protection.
2. How to recognise any likely or actual environmental damage.
3. What are the appropriate actions to take in the discovery of likely or actual environmental damage.
4. What are the ways in which tools and materials should be used in order to minimise environmental damage.
5. What are the different types of pollution.
6. What are the consequences of pollution.
7. How to recognize wastage of energy, water, equipment and materials.
8. What are the methods of working that will minimise pollution and wastage of resources.
9. What are the types of damage which may occur, the impact these can have on the environment and corrective actions to be taken.
10. What are the methods of waste disposal which will minimise the risk to the environment.
11. What are the organisational requirements to prevent wastage.

EVIDENCE GUIDE

For assessment purposes:

(1) Critical Aspects of Evidence

Candidates must prove that they can carry out **all** the elements, meeting **all** of the performance criteria, range and underpinning knowledge **on no less than three (3) occasions**. This evidence must come from a real working environment.

(2) Methods of Assessment

Assessors should gather a range of evidence that is valid, sufficient, current and authentic.

Evidence may be collected in a variety of ways including:

- Observation
- Written/oral questioning
- Witness testimony
- Personal statement
- Written evidence (projects or assignments)
- Case study and scenario analysis
- Role play/simulation

(3) Context of Assessment

This unit may be assessed on the job, off the job or using a combination of both. Where assessment occurs off the job, that is, the candidate is not in productive work, then an appropriate simulation must be used where the range of conditions reflects realistic workplace situations. The competencies covered by this unit would be demonstrated by a candidate working alone or as part of a team. The assessment environment should not disadvantage the candidate.

The candidate must have access to all tools, equipment, materials and documentation required. The candidate must be permitted to refer to any relevant workplace procedures, products and manufacturing specifications, codes, standards, manuals and reference materials.

Simulation **must not be used**, except in exceptional circumstances where natural work evidence is unlikely to occur.

U54902

Practise health, safety, security and hygiene

Unit Descriptor:

This unit describes the knowledge, skills and attitudes required to coordinate health, safety and hygiene requirements to function effectively and efficiently. It details the outcomes required to comply with regulatory and organisational requirements for health, safety and hygiene including dealing with emergency situations and maintaining safe personal presentation standards.

ELEMENT**PERFORMANCE CRITERIA**

To be competent you must achieve the following:

- | | |
|---|--|
| 1. Follow health, safety and security practices | <ul style="list-style-type: none"> 1.1 Follow health, safety and security procedures in line with legislation, regulations and organisational procedures. 1.2 Identify and report obstacles to health, safety and security procedures. 1.3 Report suspicious behaviour or unusual occurrences in accordance with standard operating procedures. |
| 2. Deal with emergency situations | <ul style="list-style-type: none"> 2.1 Identify emergency and potential emergency situations. 2.2 Take appropriate action to deal with recognised emergency situations within the individual's scope of responsibility. 2.3 Seek assistance from colleagues to resolve or respond to emergency situations. 2.4 Report details of emergency situations according to industry requirements. |
| 3. Follow hygiene procedures | <ul style="list-style-type: none"> 3.1 Implement workplace hygiene procedures in a manner appropriate for the workplace. 3.2 Handle and store items with care according to industry requirements. |
| 4. Identify and prevent hygiene risks | <ul style="list-style-type: none"> 4.1 Identify potential hygiene risks. 4.2 Take actions within the scope of your own authority to minimise and/or remove risks. |

- 4.3 Report **hygiene risks** beyond own control to the appropriate person.

RANGE STATEMENT

All range statements must be assessed:

1. Health, safety and security procedures:

- Use of personal protective clothing and equipment
- Safe work techniques
- Safe handling of chemicals and dangerous materials
- Ergonomically sound workstations
- Emergency, fire and accident
- Hazard identification and control
- Security of documents, cash, equipment, people
- Key control systems

2. Obstacles:

- Loss of keys
- Strange or suspicious persons
- Broken or malfunctioning equipment
- Loss of property, goods or materials
- Damaged property
- Lack of suitable signage
- Lack of training on health and safety issues
- Unsafe work practices

3. Emergency:

- Personal/client injuries
- Fire
- Electrocution
- Natural disasters
- Criminal acts

4. Hygiene procedures:

- Avoidance of cross contamination
- Handling and disposal of linen and laundry
- Handling and disposal of garbage
- Cleaning and sanitising procedures
- Personal hygiene

5. Hygiene risks:

- Infectious linen
- Cross contamination
- Personal hygiene practices
- Poor work practices
- Cleaning
- Housekeeping
- Airborne dust

6. Minimise and/or remove risks:

- Auditing staff skills
- Provide training
- Organisational policies and procedures
- Follow up actions for audits or incidents

UNDERPINNING KNOWLEDGE AND SKILLS

You need to know and understand:

1. What are the hygiene and control procedures in the industry.
2. What factors contribute to workplace hygiene problems.
3. How to handle linen, laundry and garbage to avoid cross contamination and infection.
4. When and how to apply hygiene principles.
5. How to communicate effectively on health, safety, security and hygiene matters.
6. What are the relevant workplace health, safety, emergency and security procedures.
7. How to correctly dispose of garbage.

EVIDENCE GUIDE

For assessment purposes:

(1) Critical Aspects of Evidence

Candidates must prove that they can carry out **all** of the elements, meeting **all** of the performance criteria, range and underpinning knowledge **on more than one occasion**. This evidence must come from a real working environment.

(2) Method of Assessment

Assessors should gather a range of evidence that is valid, sufficient, current and authentic.

Evidence may be collected in a variety of ways including:

- Oral questioning
- Observation
- Written evidence (case study, projects, assignments)
- Witness testimony

(3) Context of Assessment

This unit may be assessed on the job, off the job or using a combination of both. Where assessment occurs off the job, that is, the candidate is not in productive work, then an appropriate simulation must be used where the range of conditions reflects realistic workplace situations. The competencies covered by this unit would be demonstrated by a candidate working alone or as part of a team. The assessment environment should not disadvantage the candidate.

The candidate must have access to all tools, equipment, materials and documentation required. The candidate must be permitted to refer to any relevant workplace procedures, products and manufacturing specifications, codes, standards, manuals and reference materials.

Simulation **should not be used**, except in exceptional circumstances, where natural work evidence is unlikely to occur.

U84902**Develop personal performance through delivering customer service**

Unit Descriptor:

This unit describes the knowledge, skills and attitudes required to carry out a self-assessment, plan performance activities, review and update plans and gather feedback within your role in customer service.

ELEMENT**PERFORMANCE CRITERIA**

To be competent you must achieve the following:

- | | |
|---|--|
| 1. Review performance | 1.1 Consult an appropriate person to establish what needs to be known and understood. |
| | 1.2 Identify and review areas based on your own positive and negative customer service experiences. |
| | 1.3 Carry out a self-assessment on your own performance to identify strengths, weaknesses and development needs. |
| 2. Prepare and maintain a personal development plan | 2.1 Agree strengths, weaknesses and needs with appropriate persons . |
| | 2.2 Draw up a development plan with appropriate persons to improve performance. |
| | 2.3 Develop a personal developmental plan based on identified needs. |
| | 2.4 Review progress towards objectives regularly with appropriate persons . |
| 3. Undertake developmental activities | 3.1 Complete developmental activities identified in the personal development plan. |
| | 3.2 Use every day experiences with customers and personal experiences as a customer to develop customer service performance. |
| | 3.3 Obtain feedback from appropriate persons about your customer service performance. |
| | 3.4 Review and update personal development plans as required. |

RANGE STATEMENT

All range statements must be assessed:

1. Appropriate persons:

- Supervisor/team leaders
- Manager
- Mentor/coach

2. Self-assessment:

- S.W.O.T. Analysis
- Performance appraisals

UNDERPINNING KNOWLEDGE AND SKILLS

You need to know and understand:

1. Who to consult to gain understanding about your role in delivering customer service.
2. How to identify and review areas based on own positive and negative customer experiences.
3. What is self-assessment and how to carry out an assessment to identify your own strengths, weaknesses and development needs.
4. How to identify and draft personal objectives and goals.
5. How to draw up personal development plans.
6. Why it is important to regularly review progress towards objectives with appropriate persons and how to do so.
7. Why it is important to complete developmental activities identified in the personal development plan.
8. How to use every day experiences with customers and personal experiences as a customer to develop customer service performance.
9. Why it is important to obtain feedback from appropriate persons about your customer service performance and the ways in which this can be done.
10. Why and how to update personal development plans.

EVIDENCE GUIDE

For assessment purposes:

(1) Critical Aspects of Evidence

Candidates must prove that they can carry out **all** of the elements, meeting **all** the performance criteria, range and underpinning knowledge **on more than one occasion**. This evidence must come from a real work environment.

(2) Methods of Assessment

Assessors should gather a range of evidence that is valid, sufficient, current and authentic.

Evidence may be collected in a variety of ways including:

- Observation
- Oral questioning
- Written evidence (case study, projects, assignments)
- Witness testimony

(3) Context of Assessment

This unit may be assessed on the job, off the job or a combination of both. Where assessment occurs off the job, that is, the candidate is not in productive work, then an appropriate simulation must be used where the range of conditions reflects realistic workplace situations. The competencies covered by this unit would be demonstrated by a candidate working alone or as part of a team. The assessment environment should not disadvantage the candidate.

The candidates must have access to all tools, equipment, materials and documentation required. The candidate must be permitted to refer to any relevant workplace procedures, products and manufacturing specifications, codes, standards, manuals and reference materials.

Simulation **should not be used** except in exceptional circumstances where natural work evidence is unlikely to occur.

U53802**Participate in workplace communication**

Unit Descriptor:

This unit describes the knowledge, skills and attitudes required to gather, interpret and convey information in response to workplace requirements.

ELEMENT**PERFORMANCE CRITERIA**

To be competent you must achieve the following:

- | | |
|--|--|
| 1. Gather and convey workplace information | 1.1 Access relevant and up-to-date information from appropriate sources . |
| | 1.2 Use effective communication strategies to gather and convey information. |
| | 1.3 Use appropriate medium to transfer information and ideas. |
| | 1.4 Identify and follow lines of communication with management and colleagues. |
| | 1.5 Define procedures for the location and storage of information. |
| | 1.6 Record information according to organisational procedures. |
| 2. Participate in workplace meetings and discussions | 2.1 Make useful contributions in meetings and discussions. |
| | 2.2 Express opinions clearly in a courteous and respectful manner. |
| | 2.3 Confirm that discussions are appropriate to the purpose and proposed outcome of the meeting. |
| | 2.4 Interpret and implement meeting outcomes. |
| 3. Complete work related documents | 3.1 Select correct documentation and complete accurately and legibly according to organisational requirements. |
| | 3.2 Identify and correct errors on forms and documents. |

RANGE STATEMENT

All range statements must be assessed:

1. Appropriate sources:

- Team members
- Suppliers
- Trade personnel
- Public sector (government)
- Industry

2. Communication strategies:

- Questioning
- Listening
- Speaking
- Writing
- Non-verbal communication

3. Medium:

- Memorandum
- Circular
- Notice
- Information discussion
- Follow-up or verbal instruction
- Face to face communication

4. Storage:

- Manual filing system
- Electronic filing system

5. Protocols:

- Organisational policies and procedures
- Legislation

6. Workplace interactions:

- Face to face
- Telephone
- ICT
- Written (electronic, memos, instructions, forms)
- Non-verbal (gestures, signals, signs, diagrams)

UNDERPINNING KNOWLEDGE AND SKILLS

You need to know and understand:

1. What are the organisational policies and procedures that relate to the communication of information.
2. How to locate, interpret and provide information in response to organisational requirements or customer requests.
3. What are appropriate sources of information.
4. What is effective communication.
5. What are the different modes of communication and how to use them.
6. What are the different communication strategies and how to use them.
7. How to communicate effectively with management, colleagues and clients to provide information and feedback.
8. How to participate in workplace meetings and discussions.
9. How to identify the purpose and proposed outcomes of a meeting and make positive contributions to achieve them.
10. How to express opinions in a clear and courteous manner.
11. How to use basic ICT resources (fax, telephone, computer).
12. What is the range of work related documentation and how this should be completed.

EVIDENCE GUIDE

For assessment purposes:

(1) Critical Aspects of Evidence

Candidates must prove that they can carry out **all** the elements, meeting **all** of the performance criteria, range and underpinning knowledge **on more than one occasion**. This evidence must come from a real working environment.

(2) Methods of Assessment

Assessors should gather a range of evidence that is valid, sufficient, current and authentic.

Evidence may be collected in a variety of ways including:

- Observation
- Written/oral questioning
- Written evidence
- Witness testimony
- Professional discussion

Questioning techniques should not require language, literacy or numeracy skills beyond those required in this unit of competency.

(3) Context of Assessment

This unit may be assessed on the job, off the job or a combination of both. Where assessment occurs off the job, that is the candidate is not in productive work, then an appropriate simulation must be used where the range of conditions reflects realistic workplace situations. The competencies covered by this unit would be demonstrated by a candidate working alone or as part of a team. The assessment environment should not disadvantage the candidate.

The candidate must have access to all tools, equipment, materials and documentation required. The candidate must be permitted to refer to any relevant workplace procedures, product and manufacturing specifications, codes, standards, manuals and reference materials.

Simulation **must not** be used, except in exceptional circumstances where natural work evidence is unlikely to occur.

UA32902

Maintain stock control

Unit Descriptor:

This unit deals with the knowledge, skills and attitudes required to use inventory systems to organise stock control in accordance with relevant regulations and organisational requirements.

ELEMENT**PERFORMANCE CRITERIA**

To be competent you must achieve the following:

- | | |
|---|--|
| 1. Identify inventory and stock control systems | <ul style="list-style-type: none"> 1.1 Identify and document the legal, regulatory and ethical requirements relating to the use of inventory systems in stock control. 1.2 Identify and document stock control equipment, software and inventory recording systems used within the organisation according to established procedures. 1.3 Discuss and agree with management, the database approach to inventory records and documentation in accordance with organisational policies and procedures. 1.4 Identify and adhere to the organisational procedures for identifying and reporting discrepancies or variances in stock. |
| 2. Maintain stock levels | <ul style="list-style-type: none"> 2.1 Conduct stock level maintenance checks in accordance with organisational requirements. 2.2 Re-order stock to meet stock level maintenance requirements in accordance with organisational policies and procedures. 2.3 Enter and extract data accurately from the inventory records system following the appropriate organisational procedures. |
| 3. Organise cyclical stock counts and report discrepancies or variances | <ul style="list-style-type: none"> 3.1 Plan and document the organisational process for conducting a cyclical stock count according to established procedures. 3.2 Conduct and document stock taking activities in accordance with organisational procedures. |

- 3.3 Identify and document types and causes of record discrepancies in accordance with organisational procedures.
 - 3.4 Select and use approved procedures for noting and correcting minor discrepancies in stock counts.
 - 3.5 Document and report major discrepancies in stock counts to relevant persons, in accordance with organisational procedures.
 - 4. Produce reports on record keeping and inventory functions
 - 4.1 Identify the types of reports to be produced from **inventory recording systems** in accordance with organisational procedures.
 - 4.2 Produce and submit reports in accordance with organisational procedures and relevant regulatory requirements.

RANGE STATEMENT

All range statements must be assessed:

1. Inventory recording systems:

- Perpetual inventory system
- Periodic inventory system

2. Cyclical stock count:

- Control group cycle counting
- Random sample cycle counting
- ABC analysis cycle counting

3. Relevant persons

- Supervisor
- Manager

UNDERPINNING KNOWLEDGE AND SKILLS

You need to know and understand

1. What are the legal, regulatory and ethical requirements relating to the use of inventory systems in stock control.
2. Why it is important to identify and document the legal, regulatory and ethical requirements relating to the use of inventory systems in stock control and how to do so.
3. What are stock control equipment, software and inventory recording systems.
4. How to identify and document stock control equipment, software and inventory recording systems.
5. Why it is important to discuss and agree with management the database approach to inventory records and documentation and how to do so.
6. What are the organisational procedures for identifying and reporting discrepancies or variances in stock.
7. How to conduct stock level maintenance checks, following organisational policies and procedures.
8. How to re-order stock to meet stock level maintenance requirements.
9. How to enter and extract data accurately from the inventory and records systems using appropriate organisational procedures.
10. What is a cyclical stock count.
11. How to plan and document the organisational process for conducting a cyclical stock count.
12. How to conduct and document stock taking activities in accordance with organisational procedures.
13. What are the types and causes of record discrepancies.
14. How to identify and document types and causes of record discrepancies, in accordance with organisational procedures.
15. How to select and use procedures for noting and correcting minor discrepancies in stock counts following organisational procedures.
16. How to document and report major discrepancies in stock counts to a manager, in accordance with organisational procedures.
17. What are the types of reports to be produced from inventory records systems.
18. How to produce and submit reports in accordance with organisational procedures and relevant regulatory requirements.

EVIDENCE GUIDE

For assessment purposes:

(1) Critical Aspects of Evidence

Candidates must prove that they can carry out **all** of the elements, meeting **all** the performance criteria, range and underpinning knowledge **on more than one occasion**. This evidence must come from a real work environment.

(2) Methods of Assessment

Assessors should gather a range of evidence that is valid, sufficient, current and authentic.

Evidence may be collected in a variety of ways including:

- Observation
- Written/oral questioning
- Written evidence
- Witness testimony
- Professional discussion
- Products of work

Questioning techniques should not require language, literacy or numeracy skills beyond those required in this unit of competency.

(3) Context of Assessment

This unit may be assessed on the job, off the job or a combination of both. Where assessment occurs off the job, that is the candidate is not in productive work, then an appropriate simulation must be used where the range of conditions reflects realistic organisational situations. The competencies covered by this unit would be demonstrated by a candidate working alone or as part of a team. The assessment environment should not disadvantage the candidate.

The candidate must have access to all tools, equipment, materials and documentation required. The candidate must be permitted to refer to any relevant organisational procedures, product and manufacturing specifications, codes, standards, manuals and reference materials.

Simulation **should not be used**, except in exceptional circumstances where natural work evidence is unlikely to occur.

UA33002**Pick and process merchandise orders**

Unit Descriptor:

This unit deals with the knowledge, skills and attitudes required to pick and process orders in accordance with relevant codes, regulations and organisational requirements. It includes identifying organisational order picking processes, policies and procedures; picking and despatching orders; and recording stock levels.

ELEMENT**PERFORMANCE CRITERIA**

To be competent you must achieve the following:

- | | |
|--|---|
| 1. Identify order picking processes, policies and procedures | <ul style="list-style-type: none"> 1.1 Identify and document the legal and regulatory requirements related to picking and processing orders. 1.2 Obtain and interpret the organisational procedures for order picking and completing related organisational documentation. 1.3 Identify and locate stock allocation and location systems in accordance with organisational policies and procedures. 1.4 Select and use appropriate manual handling equipment in accordance with work health and safety and occupational health and safety regulations. |
| 2. Pick and dispatch an order | <ul style="list-style-type: none"> 2.1 Plan work requirements and assemble appropriate equipment and documentation in accordance with organisational policies and quality control procedures. 2.2 Re-order stock to meet stock level maintenance requirements in accordance with organisational policies and procedures. 2.3 Establish a pick path in accordance with organisational procedures. 2.4 Select and stack appropriate pallet/s for orders to minimise stock damage and to maximise stability as required following organisational procedures. |

- 2.5 Select and locate products in dispatch areas in accordance with organisational procedures.
 - 2.6 Assemble products accurately and obtain the sign-off of picked orders to meet organisational schedules.
 - 2.7 Consolidate, secure, arrange and place orders in storage areas in accordance with schedules and organisational procedures.
3. Record stock levels
- 3.1 Check storage areas and note stock for replenishment in accordance with organisational procedures.
 - 3.2 Complete records in accordance with organisational requirements and procedures.

RANGE STATEMENT

All range statements must be assessed:

1. Legal and regulatory

- Organisational procedures and practices
- Standard operating procedures
- Conditions of service, legislation and industrial agreements
- National legislation
- Occupational health & safety

UNDERPINNING KNOWLEDGE AND SKILLS

You need to know and understand:

1. What are the legal and regulatory requirements related to picking and processing orders.
2. Why it is important to identify and document the legal and regulatory requirements related to picking and processing orders and how to do so.
3. How to obtain and interpret organisational procedures for order picking and completing related organisational documentation.
4. What are stock allocation and location systems.
5. Why it is important to identify and locate stock allocation and location systems in accordance with organisational policies and procedures and how to do so.
6. What are the types of manual handling equipment to be used in accordance with work health and safety and occupational health and safety regulations.
7. Why it is important to select and use appropriate manual handling equipment in accordance with work health and safety and occupational health and safety regulations.
8. How to plan work requirements and assemble appropriate equipment and documentation in accordance with organisational policies and quality control procedures.
9. How to re-order stock to meet stock level maintenance requirements, in accordance with organisational policies and procedures.
10. What is a 'Pick Path'.
11. How to establish a 'Pick Path' in accordance with organisational procedures.
12. How to select and stack appropriate pallets for orders to minimise stock damage and to maximise stability, as required, following organisational procedures.
13. How to select and locate products in dispatch areas in accordance with organisational procedures.
14. How to assemble products accurately and obtain sign-off of picked orders to meet organisational schedules.
15. How to consolidate, secure, arrange and place orders in storage areas in accordance with schedules and organisational procedures.
16. How to check storage areas and note stocks for replenishment in accordance with organisational procedures.
17. How to complete records in accordance with organisational requirements and procedures.

EVIDENCE GUIDE

For assessment purposes:

(1) Critical Aspects of Evidence

Candidates must prove that they can carry out **all** of the elements, meeting **all** the performance criteria, range and underpinning knowledge **on more than one occasion**. This evidence must come from a real work environment.

(2) Methods of Assessment

Assessors should gather a range of evidence that is valid, sufficient, current and authentic.

Evidence may be collected in a variety of ways including:

- Observation
- Written/oral questioning
- Written evidence
- Case study
- Project
- Witness testimony
- Professional discussion
- Products of work

Questioning techniques should not require language, literacy or numeracy skills beyond those required in this unit of competency.

(3) Context of Assessment

This unit may be assessed on the job, off the job or a combination of both. Where assessment occurs off the job, that is the candidate is not in productive work, then an appropriate simulation must be used where the range of conditions reflects realistic organisational situations. The competencies covered by this unit would be demonstrated by a candidate working alone or as part of a team. The assessment environment should not disadvantage the candidate.

The candidate must have access to all tools, equipment, materials and documentation required. The candidate must be permitted to refer to any relevant organisational procedures, product and manufacturing specifications, codes, standards, manuals and reference materials.

Simulation **should not be used**, except in exceptional circumstances where natural work evidence is unlikely to occur.

UA33102

Identify marketing opportunities

Unit Descriptor:

This unit deals with the knowledge, skills and attitudes required to identify potential marketing opportunities to enable the evaluation and selection of viable opportunities.

ELEMENT**PERFORMANCE CRITERIA**

To be competent you must achieve the following:

- | | | | |
|----|------------------------|-----|--|
| 1. | Confirm business needs | 1.1 | Identify and document the legal and ethical requirements of the business in accordance with organisational requirements. |
| | | 1.2 | Identify business information to confirm current performance and market position in accordance with the strategic and marketing plan . |
| | | 1.3 | Confirm the direction and goals of the business in accordance with the strategic and marketing plan . |
| | | 1.4 | Confirm and document the existing structure and operation of the business in accordance with the strategic and marketing plan . |
| | | 1.5 | Identify and record current capabilities and resources of the organisation in accordance with the strategic and marketing plan . |
| | | 1.6 | Identify and document business needs in accordance with the strategic and marketing plan . |
| 2. | Identify market needs | 2.1 | Investigate market trends and developments and identify market needs relative to the business. |
| | | 2.2 | Source comparative market information to identify possible market needs in relation to the business. |
| | | 2.3 | Identify and document the legal and ethical requirements of the market and their impact on the business in accordance with organisational requirements. |

- 2.4 Identify **new and emerging markets** and document their features in accordance with organisational requirements.
- 3. Identify marketing opportunities
 - 3.1 Identify and document **marketing opportunities** in accordance with organisational requirements.
 - 3.2 Evaluate and record **marketing opportunities** and supporting information in accordance with organisational requirements and the **marketing plan**.

RANGE STATEMENT

All range statements must be assessed:

1. Legal and ethical requirements:

- Legislation, e.g. trade practices and occupational health and safety legislation
- Regulations
- Codes of practice
- Ethical principles
- Policies and guidelines
- Society's expectations
- Cultural expectations and influences
- Social responsibilities e.g. protection of children, environmental issues

2. Business information:

- Needs assessment
- Customer requirements
- Sales figures
- Profitability
- Market share
- Competitors' performance

3. Marketing:

- Marketing of goods
- Services marketing
- Ideas marketing
- Public sector marketing
- Direct marketing
- Telemarketing
- Business-to-business marketing

4. Capabilities and resources:

- Location and position
- Level of technology
- Age and life of business equipment
- Industrial relations climate
- Human and financial resources
- Distribution channels
- Communications

5. New and emerging markets:

- Segment of the market not currently penetrated
- Export market
- E-commerce

UNDERPINNING KNOWLEDGE AND SKILLS

You need to know and understand:

1. What are the legal and ethical requirements of the business in accordance with organisational requirements.
2. Why it is important to identify and document the legal and ethical requirements that relate to a business and how to do so.
3. How to identify business information to confirm current performance and market position.
4. How to confirm the direction and goals of the business.
5. Why it is important to confirm and document the existing structure and operation of the business in accordance with the strategic and marketing plan and how to do so.
6. How to identify and record the current capabilities and resources of the organisation in accordance with the strategic and marketing plan.
7. How to identify and document business needs in accordance with the strategic and marketing plan.
8. Why it is important to investigate market trends and developments and identify the market needs relative to the business in accordance with the strategic and marketing plan and how to do so.
9. How to source comparative market information to identify possible market needs in relation to the business.
10. How to identify and document the legal and ethical requirements of the market and their impact on the business.
11. Why it is important to identify new and emerging markets and document their features in accordance with organisational requirements and how to do so.
12. How to identify and document marketing opportunities that are in accordance with organisational requirements.
13. Why it is important to evaluate and record marketing opportunities and supporting information in accordance with organisational requirements and the marketing plan and how to do so.

EVIDENCE GUIDE

For assessment purposes:

(1) Critical Aspects of Evidence

Candidates must prove that they can carry out **all** of the elements, meeting **all** the performance criteria, range and underpinning knowledge **on more than one occasion**. This evidence must come from a real work environment.

(2) Methods of Assessment

Assessors should gather a range of evidence that is valid, sufficient, current and authentic.

Evidence may be collected in a variety of ways including:

- Observation
- Written/oral questioning
- Written evidence
- Case study
- Project
- Witness testimony
- Professional discussion
- Products of work

Questioning techniques should not require language, literacy or numeracy skills beyond those required in this unit of competency.

(3) Context of Assessment

This unit may be assessed on the job, off the job or a combination of both. Where assessment occurs off the job, that is the candidate is not in productive work, then an appropriate simulation must be used where the range of conditions reflects realistic workplace situations. The competencies covered by this unit would be demonstrated by a candidate working alone or as part of a team. The assessment environment should not disadvantage the candidate.

The candidate must have access to all tools, equipment, materials and documentation required. The candidate must be permitted to refer to any relevant workplace procedures, product and manufacturing specifications, codes, standards, manuals and reference materials.

Simulation **should not be used**, except in exceptional circumstances where natural work evidence is unlikely to occur.

UA33202**Create and maintain visual merchandising displays**

Unit Descriptor:

This unit deals with the knowledge, skills and attitudes required to interpret a visual merchandising plan and to create and maintain displays to ensure that they meet the requirements of the plan and organisational standards.

ELEMENT**PERFORMANCE CRITERIA**

To be competent you must achieve the following:

- | | |
|--|--|
| 1. Interpret a visual merchandising plan | <ul style="list-style-type: none"> 1.1 Identify and document the legal and ethical requirements of creating and maintaining merchandising displays in accordance with organisational requirements. 1.2 Identify and analyse the design requirements of the organisation's visual merchandising plan. 1.3 Source the required resources to implement the merchandising plan from relevant sources. 1.4 Identify and document factors that may impact the merchandising plan. 1.5 Apply the organisation's visual merchandising standards to creating the display. |
| 2. Monitor display requirements | <ul style="list-style-type: none"> 2.1 Monitor displays regularly to ensure they meet the requirements of the visual merchandising plan according to organisational requirements. 2.2 Identify and document damage or changes to displays according to organisational procedures. 2.3 Take action to rectify problems with displays in accordance with the merchandising plan and within the scope of your authority. |
| 3. Maintain displays to organisation requirements and plan | <ul style="list-style-type: none"> 3.1 Maintain displays so that they are clean and tidy in accordance with the merchandising plan. |

- 3.2 Maintain organisational requirements in displays for visual merchandising.
 - 3.3 Make additions or changes to displays so that they consistently adhere to the visual merchandising plan.
- 4. Contribute to the visual merchandising standards of the organisation
 - 4.1 Interpret the visual **merchandising standards** of the organisation following organisational plans.
 - 4.2 Identify opportunities for improving the organisation's **visual merchandising standards**.
 - 4.3 Make contributions to the **visual merchandising standards** according to the merchandising plan.

RANGE STATEMENT

All range statements must be assessed

1. Legal and ethical requirements

- Legislation, e.g. trade practices and occupational health and safety legislation
- Regulations
- Codes of practice
- Ethical principles
- Policies and guidelines
- Society's expectations
- Cultural expectations and influences
- Social responsibilities e.g. protection of children, environmental issues

2. Design requirements:

- Colours used
- Layout of the display
- Functionality
- Merchandise
- Creativity
- Size and height of display
- Location in store of display

3. Resources:

- Design or sketch of display outcome
- Backdrop, fixtures and fittings
- People
- Time
- Promotional/literature materials
- Supports
- Lights
- Product

4. Factors:

- Store promotions
- Time requirements
- Budget requirements
- Availability of staff
- Volume of customers
- Nature of the products

5. Organisational visual merchandising standards:

- Store plan and design
- Retail image
- Available technology
- Location of display

6. Damage:

- To fixtures, fittings or display supports
- To items on display
- Changes in the appearance of the display
- Expired products

UNDERPINNING KNOWLEDGE AND SKILLS

You need to know and understand

1. What are the legal and ethical requirements of creating and maintaining merchandising displays.
2. Why it is important to identify and document the legal and ethical requirements of creating and maintaining merchandising displays in accordance with organisational requirements and how to do so.
3. Why it is important to identify the design requirements of an organisation's visual merchandising plan and how to do so.
4. What are the resources required to implement the merchandising plan and why and how to do so.
5. What are the factors that may impact the merchandising plan.
6. Why it is important to identify and document the factors that may impact the merchandising plan and how to do so.
7. What are the organisation's visual merchandising standards for creating displays.
8. Why it is important to apply the organisation's visual merchandising standards to creating displays and how to do so.
9. Why it is important to monitor displays regularly to ensure they meet the requirements of the visual merchandising plan and how to do so.
10. How to identify damage or changes to displays.
11. Why it is important to take action to rectify any problems with displays and how to do so within the scope of your authority.
12. How to maintain displays so that they are clean and tidy.
13. How to maintain the organisation's requirements in displays for visual merchandising.
14. How to make additions or changes to displays so that they consistently adhere to the visual merchandising plan.
15. Why it is important to be able to interpret the visual merchandising standards of the organisation and how to do so.
16. Why it is important to identify opportunities for improving the organisation's visual merchandising standards and how to do so.
17. How to make contributions to the visual merchandising standards, when appropriate.

EVIDENCE GUIDE

For assessment purposes:

(1) Critical Aspects of Evidence

Candidates must prove that they can carry out **all** of the elements, meeting **all** the performance criteria, range and underpinning knowledge **on more than one occasion**. This evidence must come from a real work environment.

(2) Methods of Assessment

Assessors should gather a range of evidence that is valid, sufficient, current and authentic.

Evidence may be collected in a variety of ways including:

- Observation
- Written/oral questioning
- Written evidence
- Case study
- Project
- Witness testimony
- Professional discussion
- Products of work

Questioning techniques should not require language, literacy or numeracy skills beyond those required in this unit of competency.

(3) Context of Assessment

This unit may be assessed on the job, off the job or a combination of both. Where assessment occurs off the job, that is the candidate is not in productive work, then an appropriate simulation must be used where the range of conditions reflects realistic workplace situations. The competencies covered by this unit would be demonstrated by a candidate working alone or as part of a team. The assessment environment should not disadvantage the candidate.

The candidate must have access to all tools, equipment, materials and documentation required. The candidate must be permitted to refer to any relevant workplace procedures, product and manufacturing specifications, codes, standards, manuals and reference materials.

Simulation **should not be used**, except in exceptional circumstances where natural work evidence is unlikely to occur.

UA33302**Undertake merchandising activities**

Unit Descriptor:

This unit deals with the knowledge, skills and attitudes required to carry out merchandising activities. It includes confirming daily roles and responsibilities, preparing for merchandising activities, preparing a pick list and dealing with customers.

ELEMENT**PERFORMANCE CRITERIA**

To be competent you must achieve the following:

- | | |
|---|--|
| 1. Confirm daily roles and responsibilities | 1.1 Identify and document legislation, codes and national standards relevant to merchandising activities in accordance with organisational requirements.

1.2 Confirm roles and responsibilities with relevant persons in accordance with the merchandising plan and organisational requirements.

1.3 Identify and acquire from relevant persons , required documentation and materials for tasks in accordance with the merchandising plan.

1.4 Confirm documentation with relevant persons in accordance with the merchandising plan. |
| 2. Prepare for merchandising activities | 2.1 Check and prepare equipment and materials for use in accordance with the merchandising plan.

2.2 Check prices and bar codes for currency and authorisation in accordance with the merchandising plan.

2.3 Check printed materials for accuracy, in accordance with the merchandising plan. |
| 3. Prepare a pick list | 3.1 Check goods to determine what is needed to replenish and replace stock in accordance with the merchandising plan.

3.2 Record the status of goods according to bar codes, price, size and description. |

- 3.3 Check and document expiry dates according to price, size, bar codes and description.
- 3.4 Compile and authorise a pick list with **relevant persons** in accordance with the merchandising plan.
- 4. Display goods
 - 4.1 Acquire goods from the warehouse and check against pick list and the merchandising plan.
 - 4.2 Use appropriate **equipment** to move goods to the required location using safe techniques.
 - 4.3 Rotate goods according to date codes and 'best by' dates in accordance with the merchandising plan.
 - 4.4 Remove, pack and record **damaged**, spoiled, out-of-date or slow-moving goods for return to the warehouse in accordance with the merchandising plan and organisational procedures.
 - 4.5 Re-label poorly or incorrectly labelled goods in accordance with the merchandising plan.
 - 4.6 Price replacement goods and match shelf-talker **information** against pricing **information** in accordance with the merchandising plan.
 - 4.7 Pack shelves according to the store's planograms, organisational standards or marketing plan.
 - 4.8 Create and dismantle promotional displays according to instructions and organisational procedures.
 - 4.9 Carry out activities according to occupational safety and health requirements, minimising injury to self or others.
 - 4.10 Prevent and minimise damage to goods, in accordance with organisational safety and health policies.

- 5. Interact with customers
 - 5.1 Use product knowledge to offer help and advice to customers in accordance with the merchandising plan and organisational procedures and policy.
 - 5.2 Promote products to customers as opportunities are identified.
- 6. Participate in housekeeping activities
 - 6.1 Clean shelves and contents according to schedule or as needed and in accordance with the merchandising plan and organisational requirements.
 - 6.2 Provide assistance with stocktaking, as instructed by the manager or supervisor.
 - 6.3 Store unused **materials** safely in the appropriate place according to organisational safety and health requirements.
 - 6.4 Clean and store **equipment** in accordance with organisational procedures and policy and manufacturer's instructions.
 - 6.5 Report damaged and malfunctioning **equipment** to relevant personnel, in accordance with organisational safety and health requirements and manufacturer's recommendations.
 - 6.6 Pack and label goods removed from shelves for storage or dispatch in accordance with the merchandising plan and organisational requirements.
 - 6.7 Clean up spills and debris immediately in accordance with safety and health requirements and organisational procedures and policy.
- 7. Provide feedback
 - 7.1 Share **information** gathered about the movement of goods from shelves with **relevant persons**, in accordance with organisational procedures.

- 7.2 Document and report **information** gathered through interaction with customers to **relevant persons** in accordance with organisational procedures.
- 7.3 Complete and submit appropriate **documentation** to relevant personnel according to organisational requirements.

RANGE STATEMENT

All range statements must be assessed:

1. Legislation, codes and national standards:

- Legislation, e.g. trade practices and occupational health and safety legislation, environmental issues, equal opportunities, anti-discrimination
- Regulations
- Industry codes of practice
- Ethical principles
- Policies and guidelines
- Consumer protection

2. Relevant persons:

- Manager or supervisor
- Sales representatives
- Warehouse Manager/Clerk
- Data Clerk

3. Documentation:

- Price list
- Pick list
- Planogram
- Manufacturer's specifications for equipment and tools
- Policies and procedures (organisational, quality assurance, emergency)
- Supplier or client instructions
- Dangerous goods declarations and material safety data sheets
- Codes of practice

4. Materials:

- Labels
- Price tags
- Clearance tags
- Shelf talkers
- Signs

5. Status of goods:

- Slow-moving
- Finished
- Damaged
- Expired

6. Equipment:

- Trolleys or shopping carts
- Pricing guns
- Tape dispenser
- Craft knife/box opener

7. Damaged goods:

- Torn or ripped
- Punctured
- Dented
- Leaking
- Heavily soiled or stained
- Broken
- Spoiled

8. Information:

- Goods identification numbers and codes
- Merchandise transfers, stock requisitions and bar codes
- Manufacturer's specifications for equipment and tools
- Policies and procedures (organisational, quality assurance, emergency)
- Supplier or client instructions
- Dangerous goods declarations and material safety data sheets
- Codes of practice

UNDERPINNING KNOWLEDGE AND SKILLS

You need to know and understand

1. What are the legislation, codes and national standards relevant to merchandising activities.
2. Why it is important to identify and document legislation, codes and national standards relevant to merchandising activities and how to do so.
3. How to confirm roles and responsibilities with relevant personnel.
4. What is a merchandising plan.
5. What are the required documents and materials to carry out tasks in accordance with the merchandising plan.
6. Why it is important to identify and acquire from relevant personnel, documentation and materials needed for tasks, in accordance with the merchandising plan and how to do so.
7. How to confirm documentation with relevant personnel in accordance with the merchandising plan.
8. How to check and prepare equipment and materials for use in accordance with the merchandising plan.
9. How to check prices and bar codes for currency and authorisation in accordance with the merchandising plan.
10. How to check printed materials for accuracy in accordance with the merchandising plan.
11. How to check goods to determine what is needed to replenish and replace stock in accordance with the merchandising plan.
12. Why it is important to record the status of goods according to bar codes, price, size and description and how to do so.
13. How to check and document expiry dates according to price, size, bar codes and description.
14. What is a pick list.
15. How to compile and authorise a pick list with relevant personnel and in accordance with the merchandising plan.
16. How to acquire goods from the warehouse and check against the pick list and the merchandising plan.
17. How to use appropriate equipment to move goods to the required location using safe techniques.
18. How to rotate goods according to date codes and 'best by' dates, in accordance with the merchandising plan.
19. How to remove, pack and record damaged goods, spoiled, out-of-date or slow-moving goods for return to warehouse, in accordance with the merchandising plan and organisational procedures.
20. How to re-label poorly or incorrectly labelled goods, in accordance with the merchandising plan.

21. How to price replacement goods and match shelf-talker information against pricing information in accordance with the merchandising plan.
22. What are the organisational standards for merchandising.
23. What is a planogram.
24. How to pack shelves according to the store's planograms, organisational standards or marketing plan.
25. How to create and dismantle promotional displays according to instructions and organisational procedures.
26. Why it is important to carry out activities according to occupational safety and health requirements, minimising injury to self or others and how to do so.
27. How to prevent and minimise damage to goods in accordance with organisational safety and health policies.
28. How to use product knowledge to offer help and advice to customers in accordance with the merchandising plan and organisational procedures and policy.
29. Why it is important to promote products to customers as opportunities are identified and how to do so.
30. How to clean shelves and contents according to schedule or as needed and in accordance with the merchandising plan.
31. How to provide assistance with stocktaking, as instructed.
32. How to store unused materials safely in the appropriate place.
33. How to clean and store equipment in accordance with organisational procedures and policy.
34. Why it is important to report damaged and malfunctioning equipment to relevant personnel, in accordance with safety and health requirements and organisational procedures and how to do so.
35. Why it is important to pack and label goods removed from shelves for storage or dispatch, in accordance with the merchandising plan and organisational requirements and how to do so.
36. Why it is important to clean up spills and debris immediately in accordance with safety and health requirements and organisational procedures and policy and how to do so.
37. Why it is important to share with relevant personnel information gathered about the movement of goods from the shelves in accordance with organisational procedures and how to do so.
38. Why it is important to document and report information gathered through interaction with customers to supervisor or sales personnel in accordance with organisational procedures and how to do so.
39. How to complete and submit appropriate documentation to relevant personnel.

EVIDENCE GUIDE

For assessment purposes:

(1) Critical Aspects of Evidence

Candidates must prove that they can carry out **all** of the elements, meeting **all** the performance criteria, range and underpinning knowledge **on more than one occasion**. This evidence must come from a real work environment.

(2) Methods of Assessment

Assessors should gather a range of evidence that is valid, sufficient, current and authentic.

Evidence may be collected in a variety of ways including:

- Observation
- Written/oral questioning
- Written evidence
- Case study
- Project
- Witness testimony
- Professional discussion
- Products of work

Questioning techniques should not require language, literacy or numeracy skills beyond those required in this unit of competency.

(3) Context of Assessment

This unit may be assessed on the job, off the job or a combination of both. Where assessment occurs off the job, that is the candidate is not in productive work, then an appropriate simulation must be used where the range of conditions reflects realistic workplace situations. The competencies covered by this unit would be demonstrated by a candidate working alone or as part of a team. The assessment environment should not disadvantage the candidate.

The candidate must have access to all tools, equipment, materials and documentation required. The candidate must be permitted to refer to any relevant workplace procedures, product and manufacturing specifications, codes, standards, manuals and reference materials.

Simulation **should not be used**, except in exceptional circumstances where natural work evidence is unlikely to occur.

UA33402

Provide marketing and promotion programme support

Unit Descriptor:

This unit deals with the knowledge, skills and attitudes required to support promotional and marketing programmes by confirming the timing and purpose of the programme, responding to enquiries and ensuring that materials are available to internal and external customers.

ELEMENT**PERFORMANCE CRITERIA**

To be competent you must achieve the following:

- | | |
|---|---|
| 1. Confirm promotional and marketing activities | <ul style="list-style-type: none"> 1.1 Establish the legal, regulatory and ethical requirements that relate to promotional and marketing programmes. 1.2 Obtain and confirm the timing and purpose of promotion and marketing programmes in accordance with the marketing plan. 1.3 Confirm your supporting role in specific marketing and promotion programmes with relevant supervisory personnel in accordance with the marketing plan and organisational procedures. 1.4 Communicate to customers, as directed, details of promotional and marketing programmes in accordance with the marketing plan and organisational procedures. |
| 2. Respond to enquiries on promotional and marketing activities | <ul style="list-style-type: none"> 2.1 Receive and action enquiries concerning promotional and marketing programmes in accordance with the marketing plan and organisational policy and procedures. 2.2 Provide on request, accurate details of promotional and marketing programmes to internal or external personnel in accordance with the marketing plan and organisational policy and procedures. |
| 3. Support marketing and promotional programmes | <ul style="list-style-type: none"> 3.1 Secure promotional, advertising or marketing materials or merchandise to meet organisational internal or external demand. |

- 3.2 Issue promotional, advertising materials or merchandise to internal or external requests in accordance with the marketing plan and organisational policy and procedures.
- 3.3 Obtain and document orders for more promotional, advertising marketing materials or merchandise in a timely manner, in accordance with the marketing plan and organisational policy and procedures.

RANGE STATEMENT

All range statements must be assessed:

1. Legal, regulatory and ethical requirements:

- Occupational health and safety
- Industry codes of practice
- License, patent or copyright arrangements
- Environmental protection legislation
- Transport, storage and handling of goods

2. Purpose of promotion and marketing:

- Product launch
- Brand awareness
- Refreshing of product
- Information sharing
- Opening
- Clearance sale
- Increasing customer awareness
- Creating and presenting an image

3. Supporting role:

- Requesting and collecting feedback
- Providing information about promotional activities
- Collecting data
- Securing and monitoring promotional merchandise and materials
- Issuing promotional merchandise and materials
- Lodging orders for more merchandise in a timely manner
- Conducting telemarketing
- Manning a display booth

4. Action enquiries:

- Providing details of promotional programme
- Issuance of marketing and promotional materials
- Taking of orders
- Taking of customer details

UNDERPINNING KNOWLEDGE AND SKILLS

You need to know and understand

1. Why it is important to establish the relevant legal, regulatory and ethical requirements that relate to promotional and marketing programmes.
2. What are the legal, regulatory and ethical requirements that relate to promotional and marketing programmes.
3. Why it is important to obtain and confirm the timing and purpose of promotion and marketing programmes in accordance with the marketing plan and how to do so.
4. Why it is important to confirm with relevant supervisory personnel, your supporting role in specific marketing and promotion programmes.
5. What details of the promotional and marketing programmes you would communicate to customers.
6. How to communicate details of promotional and marketing programmes to customers.
7. What are the procedures for receiving and actioning enquiries concerning promotional and marketing programmes and how to do so.
8. How to provide accurate details of promotional and marketing programmes to internal or external personnel on request.
9. How to secure promotional, advertising or marketing materials or merchandise to meet internal or external demand.
10. How to issue promotional, advertising or special materials or merchandise to internal or external requests.
11. How to obtain and document orders for more promotional, advertising or marketing materials or merchandise in a timely manner.

EVIDENCE GUIDE

For assessment purposes:

(1) Critical Aspects of Evidence

Candidates must prove that they can carry out **all** of the elements, meeting **all** the performance criteria, range and underpinning knowledge **on more than one occasion**. This evidence must come from a real work environment.

(2) Methods of Assessment

Assessors should gather a range of evidence that is valid, sufficient, current and authentic.

Evidence may be collected in a variety of ways including:

- Observation
- Written/oral questioning
- Written evidence
- Witness testimony
- Professional discussion
- Products of work

Questioning techniques should not require language, literacy or numeracy skills beyond those required in this unit of competency.

(3) Context of Assessment

This unit may be assessed on the job, off the job or a combination of both. Where assessment occurs off the job, that is the candidate is not in productive work, then an appropriate simulation must be used where the range of conditions reflects realistic workplace situations. The competencies covered by this unit would be demonstrated by a candidate working alone or as part of a team. The assessment environment should not disadvantage the candidate.

The candidate must have access to all tools, equipment, materials and documentation required. The candidate must be permitted to refer to any relevant workplace procedures, product and manufacturing specifications, codes, standards, manuals and reference materials.

Simulation **should not be used**, except in exceptional circumstances where natural work evidence is unlikely to occur.

UA33502**Collect and organise market research data**

Unit Descriptor:

This unit deals with the knowledge, skills and attitudes required to collect and organise market research data and use information technology to manage market research data

ELEMENT**PERFORMANCE CRITERIA**

To be competent you must achieve the following:

- | | |
|----------------------------------|--|
| 1. Collect market research data | <ul style="list-style-type: none"> 1.1 Establish the legal, regulatory and ethical requirements that relate to collecting, organising and using information technology to manage market research data. 1.2 Discuss and agree with research participants, the purpose, use, timescale and level of confidentiality of the research in accordance with the research plan and organisational policies and procedures. 1.3 Identify the need for and sources of evidence to support market research data in accordance with the research plan and organisational policies and procedures. 1.4 Set research parameters, aims and evaluation criteria in accordance with the research plan. 1.5 Select and use data collection techniques that are consistent with the research and marketing plans. 1.6 Collect and record market research data within agreed timescales and in accordance with the marketing and research plans. 1.7 Adhere to organisational protocols and standards in the collection of market research data. |
| 2. Organise market research data | <ul style="list-style-type: none"> 2.1 Validate the accuracy of data collected in accordance with the requirements of the research plan and organisational procedures. |

- 2.2 Organise quantitative and qualitative data in accordance with the requirements of the research plan.
 - 2.3 Present information in the agreed format in accordance with the requirements of the research plan and organisational procedures.
 - 3. Use information technology to manage market research data
 - 3.1 Maintain the currency, completeness and accuracy of market research files in accordance with the research plan and organisational procedures.
 - 3.2 Enhance or amend files for use in targeting, segmentation and campaigns in accordance with the research plan and organisational procedures.

RANGE STATEMENT

All range statements must be assessed:

1. Legal, regulatory and ethical requirements:

- Occupational health and safety
- Industry codes of practice
- License, patent or copyright arrangements
- Environmental protection legislation
- Marketing code of ethics
- Data protection

2. Sources of evidence:

- New product or service
- New customer or stakeholder
- Existing customers
- Competitors
- Feedback

3. Data collection techniques:

- Qualitative
- Quantitative
- Primary and secondary research

UNDERPINNING KNOWLEDGE AND SKILLS

You need to know and understand

1. What are the legal, regulatory and ethical requirements that relate to collecting and organising market research data.
2. Why it is important to establish the legal, regulatory and ethical requirements that relate to collecting and organising market research data and the use of information technology to manage market research data and how to do so.
3. Why it is important to discuss and agree with research participants the purpose, use, timescale and level of confidentiality of the research.
4. What are the available sources of evidence.
5. Why it is important to identify the need for market research and the sources of evidence to support the research and how to do so.
6. What are research parameters.
7. How to set research parameters, aims and evaluation criteria in accordance with the research plan.
8. What are the available data collection techniques.
9. Why it is important to select and use data collection techniques that are consistent with the research and marketing plans and how to do so.
10. Why it is important to collect and record market research data within agreed timescales and in accordance with the marketing and research plans.
11. What are the protocols and standards in the collection of market research data.
12. Why it is important to adhere to organisational protocols and standards in the collection of market research data and how to do so.
13. What is the difference between primary and secondary research.
14. Why it is important to validate the accuracy of the data collected in accordance with the requirements of the research plan and how to do so.
15. What are 'qualitative' and quantitative' data
16. How to organise quantitative and qualitative data in accordance with the requirements of the research plan.
17. Why it is important to present information in the agreed format in accordance with the requirements of the research plan.
18. What are the strengths and weaknesses of a range of analytical methods.
19. Why it is important to maintain the currency, completeness and accuracy of market research files and how to do so.

20. How to enhance or amend files for use in targeting, segmentation and campaigns in accordance with the research plan and organisational procedures.
21. What can be the impact of poor market research data management on an organisation.

EVIDENCE GUIDE

For assessment purposes:

(1) Critical Aspects of Evidence

Candidates must prove that they can carry out **all** of the elements, meeting **all** the performance criteria, range and underpinning knowledge **on more than one occasion**. This evidence must come from a real work environment.

(2) Methods of Assessment

Assessors should gather a range of evidence that is valid, sufficient, current and authentic.

Evidence may be collected in a variety of ways including:

- Observation
- Written/oral questioning
- Written evidence
- Case study
- Project
- Witness testimony
- Professional discussion
- Products of work

Questioning techniques should not require language, literacy or numeracy skills beyond those required in this unit of competency.

(3) Context of Assessment

This unit may be assessed on the job, off the job or a combination of both. Where assessment occurs off the job, that is the candidate is not in productive work, then an appropriate simulation must be used where the range of conditions reflects realistic workplace situations. The competencies covered by this unit would be demonstrated by a candidate working alone or as part of a team. The assessment environment should not disadvantage the candidate.

The candidate must have access to all tools, equipment, materials and documentation required. The candidate must be permitted to refer to any relevant workplace procedures, product and manufacturing specifications, codes, standards, manuals and reference materials.

Simulation **should not be used**, except in exceptional circumstances where natural work evidence is unlikely to occur.

UA33602**Use digital and social media in marketing campaigns**

Unit Descriptor:

This unit deals with the knowledge, skills and attitudes required for the use of digital and social media marketing to target customers using digital and social media.

ELEMENT**PERFORMANCE CRITERIA**

To be competent you must achieve the following:

- | | |
|--|--|
| 1. Plan the requirements for the use of digital and social media | <ul style="list-style-type: none"> 1.1 Align and document the objectives and budget for digital and social media marketing in accordance with the marketing plan. 1.2 Identify and document the nature and location of target customers in accordance with the marketing plan. 1.3 Identify and document sources of information about the nature and location of target customer groups. 1.4 Discuss and agree with relevant persons, the implications of retention and acquisition campaigns that may affect the choice of digital and social media to be used. 1.5 Detail and record the methods to be used to reach target customers in accordance with the marketing plan. 1.6 Discuss and agree on the requirements of the data collection and reporting system that will be used to capture the information required by the marketing plan. 1.7 Discuss and agree on the message that will convey the marketing proposition in accordance with the marketing plan. |
| 2. Use digital technology for social media marketing purposes | <ul style="list-style-type: none"> 2.1 Select and use the digital medium that is most appropriate for the marketing message to be conveyed in accordance with the marketing plan. |

- 2.2 Adopt and use writing and visual styles that are best suited to the chosen digital marketing medium.
- 2.3 Identify and document the precautions used to prevent marketing messages being identified as “spam”
- 2.4 Distribute marketing messages in accordance with the marketing plan and organisational procedures.
- 2.5 Conduct digital and social media marketing in accordance with **legal, regulatory and industry requirements** and standards.
- 2.6 Address and document problems in conducting digital and social marketing in accordance with the marketing plan.

RANGE STATEMENT

All range statements must be assessed:

1. Target customers:

- Specific customers
- Local market
- Demographics
- Customers with specific needs or preference
- Customers with a particular way of life

2. Relevant persons:

- Manager
- Supervisor
- Team leader

3. Methods:

- Survey customers
- Research competitors
- Competitions
- Target advertisements
- Connect with influencers

4. Legal, regulatory and industry requirements:

- Occupational health and safety
- Industry codes of practice
- License, patent or copyright arrangements
- Environmental protection legislation
- Data protection

UNDERPINNING KNOWLEDGE AND SKILLS

You need to know and understand

1. Why it is important to align and document the objectives and budget for digital and social media marketing in accordance with the marketing plan and how to do so.
2. Who and what are target customers.
3. How to identify and document the nature and location of target customers in accordance with the marketing plan.
4. Why it is important to identify and document the sources of information about the nature and location of target customer groups and how to do so.
5. Why it is important to discuss and agree with relevant persons the implications of retention and acquisition campaigns as they affect the choice of digital and social media to be used, in accordance with the marketing plan.
6. How to detail and record the methods to be used to reach target customers in accordance with the marketing plan.
7. What is a data collection and reporting system.
8. Why it is important to discuss and agree on the requirements of the data collection and reporting system that will be used to capture the information required by the marketing plan and how to do so.
9. What is a marketing proposition.
10. How to discuss and agree on the message that will convey the marketing proposition in accordance with the marketing plan.
11. How to select and use the digital medium that is most appropriate for the marketing message to be conveyed in accordance with the marketing plan.
12. Why it is important to adopt and use writing and visual styles that are best suited to the chosen digital marketing medium and how to do so.
13. Why it is important to identify and document the precautions used to prevent marketing messages being identified as “spam” and how to do so.
14. How to distribute marketing messages in accordance with the marketing plan and organisational procedures.
15. What are the legal, regulatory and industry requirements relating to digital and social media.
16. Why it is important to conduct digital and social media marketing in accordance with legal, regulatory and industry requirements and standards and how to do so.
17. Why it is important to address and document problems in conducting digital and social marketing in accordance with the marketing plan and how to do so.

EVIDENCE GUIDE

For assessment purposes:

(1) Critical Aspects of Evidence

Candidates must prove that they can carry out **all** of the elements, meeting **all** the performance criteria, range and underpinning knowledge **on more than one occasion**. This evidence must come from a real work environment.

(2) Methods of Assessment

Assessors should gather a range of evidence that is valid, sufficient, current and authentic.

Evidence may be collected in a variety of ways including:

- Observation
- Written/oral questioning
- Written evidence
- Case study
- Project
- Witness testimony
- Professional discussion
- Products of work

Questioning techniques should not require language, literacy or numeracy skills beyond those required in this unit of competency.

(3) Context of Assessment

This unit may be assessed on the job, off the job or a combination of both. Where assessment occurs off the job, that is the candidate is not in productive work, then an appropriate simulation must be used where the range of conditions reflects realistic workplace situations. The competencies covered by this unit would be demonstrated by a candidate working alone or as part of a team. The assessment environment should not disadvantage the candidate.

The candidate must have access to all tools, equipment, materials and documentation required. The candidate must be permitted to refer to any relevant workplace procedures, product and manufacturing specifications, codes, standards, manuals and reference materials.

Simulation **should not be used**, except in exceptional circumstances where natural work evidence is unlikely to occur.

UA33702**Support the coordination of a marketing event**

Unit Descriptor:

This unit deals with the knowledge, skills and attitudes required to support the coordination and delivery of a marketing event.

ELEMENT**PERFORMANCE CRITERIA**

To be competent you must achieve the following:

- | | |
|--|---|
| 1. Identify roles in supporting the co-ordination of a marketing event | <ul style="list-style-type: none"> 1.1 Follow the legal, regulatory and ethical requirements that relate to the co-ordination and delivery of a marketing event. 1.2 Identify and document the range of support activities that may be required when supporting the co-ordination of an event in accordance with the event plan and organisational procedures. 1.3 Identify and document the responsibilities involved in supporting the co-ordination of a marketing event. 1.4 Identify and discuss with relevant persons the types of problems that may occur during events and how to deal with these. |
| 2. Prepare for event staging | <ul style="list-style-type: none"> 2.1 Interpret operational documentation and clarify details of event staging requirements and resources with relevant persons. 2.2 Participate in event briefings and clarify own and team roles, responsibilities and timelines. |
| 3. Support the co-ordination of a marketing event | <ul style="list-style-type: none"> 3.1 Contribute to setting up and preparing the venue making sure all necessary resources and supporting activities are in place, in accordance with the event plan. 3.2 Liaise with management of the venue to ensure that facility resources are available and in place in accordance with the event plan and terms of the contract. |

- 3.3 Arrange resources during the event in accordance with the event plans and agreed terms of the contract.
 - 3.4 Greet delegates and help them to feel welcome.
 - 3.5 Meet delegates' needs throughout the event, in accordance with the event plan and requirements.
 - 3.6 Resolve or refer **problems** to **relevant persons** as required and in accordance with the event plan.
 - 3.7 Comply with **environmental and social sustainability procedures** as required.
 - 3.8 Clear and vacate the venue according to the terms of the contract and in accordance with the event plan.
4. Provide feedback on event operations
- 4.1 Review event operations and factors affecting efficiency and success, including your own role.
 - 4.2 Participate in event debriefings, provide feedback on operational issues and suggest improvements.

RANGE STATEMENT

All range statements must be assessed:

1. Legal, regulatory and ethical requirements:

- Occupational health and safety
- Industry codes of practice
- License, patent or copyright arrangements
- Environmental protection legislation
- Data protection
- Rules and requirements of the event

2. Relevant persons:

- Manager
- Supervisor
- Team leader
- Rostered

3. Problems:

- Minor (can be resolved by making adjustments with little or no assistance)
- Major (those that have resource or financial implications)
- Costs money or will affect others
- Seriously impacts the overall target or deadline
- No apparent solution
- Security, health or safety risk
- Solution is outside the candidate's scope of authority

4. Operational documentation:

- Contact numbers for contractors and emergency services
- Event programme and scheduled time for activities
- Itemised list of resources
- Site maps or layout plan for venue or site
- Plans and procedures
- Running sheet for delivery of event
- Staffing rosters

5. Event staging:

- Products and services (catering, displays, stands, signage, speakers)
- Technical equipment and services (audiovisual, lighting, sound)
- Venue or site (layouts, registration area and equipment)

6. Environmental and social sustainability procedures:

- Recycling and disposing of waste, especially hazardous substances
- Reducing impact on the lifestyle of neighbouring residents
- Safety for crowds and the movement of large numbers of attendees
- Use of energy, water and other resources during event set-up, operation and break-down

UNDERPINNING KNOWLEDGE AND SKILLS

You need to know and understand

1. What are the legal, regulatory and ethical requirements that relate to the co-ordination and delivery of an event.
2. What is an 'Event Plan'.
3. Why it is important to identify and document the range of support activities that may be required when supporting the co-ordination of an event and how to do so
4. What are the responsibilities involved in supporting the co-ordination of an event.
5. Why it is important to identify and discuss with relevant persons, the types of problems that may occur during events and how to deal with these.
6. Why it is important to interpret and clarify operational documentation and details of event staging requirements and resources with relevant persons and how to do so.
7. What are the types of follow-up activities that may be required to carry out the co-ordination of an event.
8. Why it is important to participate in event briefings and clarify your own and team roles, responsibilities and timelines and how to do so.
9. How to assist in setting up and preparing the venue making sure all necessary resources and supporting activities are in place, in accordance with the event plan.
10. What is a 'Terms of Contract'.
11. How to liaise with the management of the venue to make sure that resources are available and in place in accordance with the event plan and terms of the contract.
12. How to arrange the resources during an event in accordance with event plans and agreed terms of the contract.
13. What are the organisational protocols for greeting delegates at an event.
14. Why it is important to greet delegates and make them feel welcome and how to do so.
15. How to meet delegates' needs throughout an event in accordance with the event plan and requirements.
16. What are the types of problems that may occur before, during and after an event.
17. Why it is important to resolve or refer problems to relevant persons, as required and in accordance with the event plan and how to do so.
18. Why it is important to comply with environmental and social sustainability procedures and how to do so.
19. How to clear and vacate the venue according to the terms of the contract and in accordance with the event plan.
20. Why it is important to review event operations and factors affecting efficiency and success, including your own role and how to do so.

21. Why it is important to be able to participate in event debriefs, provide feedback on operational issues and suggest improvements and how to do so.

EVIDENCE GUIDE

For assessment purposes:

(1) Critical Aspects of Evidence

Candidates must prove that they can carry out **all** of the elements, meeting **all** the performance criteria, range and underpinning knowledge **on more than one occasion**. This evidence must come from a real work environment.

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- Witness testimony
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This unit may be assessed on the job, off the job or a combination of both. Where assessment occurs off the job, that is the candidate is not in productive work, then an appropriate simulation must be used where the range of conditions reflects realistic workplace situations. The competencies covered by this unit would be demonstrated by a candidate working alone or as part of a team. The assessment environment should not disadvantage the candidate.

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Simulation **should not be used**, except in exceptional circumstances where natural work evidence is unlikely to occur.

Assessment methods

The methods which can be used to determine competence in performance and underpinning knowledge.

Assessors

The Assessor's role is to determine whether evidence presented by a candidate for assessment within the programme meets the required standard of competence in the relevant unit or element. The Assessor needs to be competent to assess to national standards in the area under assessment.

Approved Centre

Organisation/Centre approved by the TVET Council to offer full National Vocational Qualifications.

Case Studies

In situations where it is difficult for workplace assessment to take place, case studies can offer the candidate an opportunity to demonstrate potential competence.

A case study is a description of an actual or imaginary situation presented in some detail. The way the case study is presented will vary depending upon the qualification, but the most usual methods are written, taped or filmed.

The main advantage of a case study is the amount of evidence of underpinning knowledge they can generate and the specific nature of the evidence produced.

Competence

In the context of vocational qualifications, competence means: the ability to carry out prescribed activities to nationally pre-determined standards in an occupation. The definition embraces cognitive, practical and behavioural skills, underpinning knowledge and understanding and the ability to react appropriately in contingency situations.

Element

An element is a description of an activity which a person should be able to do. It is a description of an action, behaviour or outcome which a person should be able to demonstrate.

Explanation of NVQ Levels

NVQs cover five (5) levels of competence, from entry level staff at Level 1 through to senior management at Level 5.

Level 1 - Entry Level

Recognises competence in a range of varied work activities performed in a variety of contexts. Most work activities are simple and routine. Collaboration with others through work groups or teams may often be a requirement. Substantial supervision is required especially during the early months evolving into more autonomy with time.

Level 2 - Skilled Occupations:

Recognises competence in a broad range of diverse work activities performed in a variety of contexts. Some of these may be complex and non-routine and involve some responsibility and autonomy. Collaboration with others through work groups or teams and guidance of others may be required.

Level 3 - Technician and Supervisory Occupations:

Recognises competence in a broad range of complex, technical or professional work activities performed in a wide variety of contexts, with a substantial degree of personal responsibility and autonomy. Responsibility for the work of others and the allocation of resources are often a requirement. The individual is capable of self-directed application, exhibits problem solving, planning, designing and supervisory capabilities.

Level 4 - Technical Specialist and Middle Management Occupations:

Recognises competence involving the application of a range of fundamental principles and complex techniques across a wide and unpredictable variety of contexts. Requires very substantial personal autonomy and often significant responsibility for the work of others, the allocation of resources, as well as personal accountability for analysis, diagnosis, design, planning, execution and evaluation.

Level 5 - Chartered, Professional and Senior Management Occupations:

Recognises the ability to exercise personal professional responsibility for the design, development or improvement of a product, process, system or service. Requires technical and management competencies at the highest level and includes those who have occupied positions of the highest responsibility and made outstanding contribution to the promotion and practice of their occupation.

External Verifier

The External Verifier is trained and appointed by the TVET Council and is competent to approve and ensure an approved Centre's quality of provision.

Internal Verifier

The Internal Verifier acts in a supporting role for Assessors to ensure consistent quality of assessment and competence. They need to be competent to assess to national standards in the area under assessment.

NVQ

National Vocational Qualifications (NVQs) are work-based qualifications that assess an individual's competence in a work situation and certify that the individual can perform the work role to the standards expected in employment.

NVQs are based on national occupational standards of competence drawn up by standards-setting bodies known as Industry Lead Bodies. The standards describe the level and breadth of performance that is expected of persons working in the industry or sector which the NVQ covers.

NVQ Coordinator

Within each approved Centre offering NVQs, there is a Centre contact who has overall responsibility for the operation and administration of the NVQ system.

Observation

Observation of the candidate carrying out his/her job in the workplace is the assessment method recommended in the vast majority of units and elements. Observation of staff carrying out their duties is something that most supervisors and managers do every day.

Performance criteria

Performance criteria indicate what is required for the successful achievement of an element. They are descriptions of what you would expect to see in competent performance.

Product of Work

This could be items produced during the normal course of work which can be used for evidence purposes such as reports, menus, promotional literature, training plans, etc.

Questioning

Questioning is one of the most appropriate ways to collect evidence to assess a candidate's underpinning knowledge and understanding.

Questioning can also be used to assess a candidate in those areas of work listed in the range which cannot be assessed by observation. Guidance on when this assessment method can be used is given in the assessment guidance of each individual element.

As an assessment method, questioning ensures the Assessor has all of the evidence about a candidate's performance. It also allows the Assessor to clarify situations.

Range statements

The range puts the element of competence into context. A range statement is a description of the range of situations to which an element and its performance criteria is intended to apply.

Range statements are prescriptive therefore, each category must be assessed.

Role-plays

Role-plays are simulations where the candidate is asked to act out a situation in the way he/she considers “real” people would behave. By using role-play situations to assess a candidate the Assessor is able to collect evidence and make a judgment about how the candidate is most likely to perform. This may be necessary if the range specified includes a situation in which the candidate is unlikely to find himself/herself in the normal course of their work, or where the candidate needs to develop competence, before being judged competent for example, in a disciplinary situation,

Simulations

Where possible, assessment should always be carried out by observing **natural performance** in the workplace. **Simulated performance**, however, can be used where specified to collect evidence about an aspect of the candidate’s work which occurs infrequently or is potentially hazardous for example, dealing with fires.

By designing the simulated situation, briefing the candidate and observing his/her performance, the Assessor will be able to elicit evidence which will help the Assessor judge how a candidate is **most likely** to perform in real life.

Supplementary evidence

Supplementary evidence can be used to confirm and support performance evidence. Types of supplementary evidence include witness testimonies, reports, journals or diaries, records of activities, personal statements, simulation (see note in glossary).

Underpinning knowledge

Underpinning knowledge indicates what knowledge is essential for a person to possess in order to successfully achieve an element and prove total competence.

Units

A unit of competence describes one or more activities which form a significant part of an individual’s work. Units are accredited separately but in combination can make up a vocational qualification. There are three categories of units:

Mandatory units - are core to a qualification and must to be completed.

Optional units - candidates must choose the required number of individual units, specified in the qualification structure, to achieve the qualification.

Work-based projects

Work-based projects are a useful way for the Assessor to collect evidence to support any decision made about a candidate's performance. They are particularly appropriate in determining the level of a candidate's underpinning knowledge and understanding where it may be insufficient to rely only on questioning or observation.

A project often involves the identification of a solution to a specific problem identified by the Assessor and/or the candidate (such as looking at ways to redress a recent drop in sales), or may be a structured programme of work built around a central situation or idea (such as the introduction of a new job rostering process).