

**Level 3 Diploma in
Work-based Floristry
(0068-31)**



www.cityandguilds.com

**Learner guide and logbook
500/9049/5**

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Qualification Information

Level 3 Diploma in Work-based Floristry (0068-31)

What is it all about?

You are about to start a programme of work-based training and assessment leading to a nationally recognised qualification, based on the National Occupational Standards for the industry. This learner guide has been written in order to provide you with information and support as you work through to achieving your qualification. As you make progress you will be able to demonstrate that you have the necessary practical skills and the knowledge to do your work effectively and efficiently.

Introduction

This document contains the information that centres need to offer the following qualification

Qualification title and level	City & Guilds qualification number	Ofqual accreditation number
Level 3 Diploma in Work-based Floristry	0068-31	500/9049/5

What is the Qualifications and Credit Framework?

Ofqual have introduced the Qualifications and Credit Framework to increase flexibility for learners and employers. It allows learners to build towards a qualification, rather than having to do all of it at the same time. Qualifications may be built up from individual units according to rules of combination. The qualifications and rules of combination (structures) are set out in this handbook. The units are derived from the National Occupational Standards, which are compiled by Lantra SSC, the Sector Skills Council for the floristry industry.

Delivery and assessment of this qualification is similar to the previous NVQs but there are some administrative changes that centres will need to put in place, such as access to unique learner numbers.

Each unit has been assigned a number of credits and the units will be assessed in the workplace and build up to a Diploma.

The Qualification

The Level 3 Diploma in Work-based Floristry (0068-31) is a programme of workplace training and assessment leading to a nationally recognised qualification. It aims to

- meet the needs of learners who work or want to work in the floristry sector
- allow learners to learn, develop and practise the skills required for employment and/or career progression in the floristry sector
- replace the following qualification:
NPTC Level 3 NVQ in Floristry (6822-03) which expires on 30/04/10 (QAN 100/2391/4).

Level 3 Diploma in Work-based Floristry (0068-31)

This qualification will form part of the Advanced Apprenticeship framework for Floristry. It is a work-related, competence-based qualification. It reflects the skills and knowledge needed to do a job effectively, and shows that a learner is competent in the area of work the qualification represents.

Who will be involved?

The learner

That's you! You will need to:

- negotiate and agree an assessment programme with your assessor
- negotiate and develop a personal action plan with dates for review and assessment
- collect the evidence which proves your competence in your job
- organise and reference the evidence in a portfolio
- judge the evidence against the standards of competence to see whether it is adequate to present for assessment
- present the evidence for assessment; this may include:-
 - attending an assessment interview
 - being available to discuss your evidence with the internal and /or external verifier if requested

Later in this guide we will explain how you can identify and collect evidence and how you can prepare for being assessed in your daily work.

The assessor

- will have experience in your area of work, must be occupationally competent and may be your immediate supervisor or manager or a visiting assessor from a training centre who will visit you a minimum of 3 times to observe you at work
- will be experienced in assessing
- will themselves have achieved a higher qualification or have significant and current experience in the area of assessment. Therefore you may have more than 1 assessor
- can advise you on the planning and organisation of your evidence
- is responsible for making the decisions about your evidence and judging when you are competent.

The internal verifier

- is appointed by the centre where you are registered
- is responsible for maintaining the quality of assessment within the centre by checking the assessment decisions made by assessors
- will have experience in your area of work and must be occupationally competent
- will themselves have achieved a higher qualification or have significant and current experience in the area of assessment to allow them to act as an internal verifier.

The external verifier

- is appointed by City & Guilds to ensure that all assessments undertaken in your centre are fair, valid, consistent and that your centre meets the required national standard
- will make regular visits to your centre to observe assessments and examine portfolios of evidence
- makes regular reports to City & Guilds confirming what happens with assessment practice in your centre.

The expert witness

Wherever possible, the evidence which you produce should be witnessed. For example your assessor, line manager or colleagues may witness an activity or authenticate a document as being your own work.

Witness status

Witnesses fall into three main categories of experience:

1. Occupational expert and D32/D33 or A1/A2 assessor who is familiar with the standards
2. D32/D33 or A1/A2 assessor without occupational competence
3. Occupational expert who is familiar with the standards.

In some circumstances it may be possible to accept witness testimony from a non-occupational expert, e.g. for evidence for a non-vocationally specific skill such as dealing with clients, validating a competition result. In these cases, the following two categories of witness may be valid:

4. Occupational expert who is not familiar with the standards
5. Non-expert not familiar with the standards, e.g. a customer.

Why do you need witnesses?

It is important to demonstrate that the evidence was produced by you under the circumstances described. The witness is therefore able to observe and report on your performance on tasks which produce evidence towards the work-based qualification. The job of the expert witness is to report to the assessor their observations of your performance. The assessor will then judge whether the evidence is sufficient.

How do you involve a witness?

The key to this is planning. In many cases someone, for example a colleague, may naturally be involved with your work and so be able to witness and authenticate evidence. However, if the work is usually unobserved, you might arrange for someone to be present (where practical) to observe your performance. Alternatively where you are working directly with or for a customer, you might ask the customer to act as a witness.

What do they have to do?

After observing your work, the witness will need to write a short statement describing what you actually did. The witness should be aware of assessment criteria for the activity and the evidence requirements which are explained in the qualification handbook. As you will be aware of the standards and the evidence you require, you may decide to write out the statement yourself and ask your witness to read it and sign if they agree with it.

You may also provide statements for yourself, e.g. to justify why you produced a product in a particular way, but this would usually need to be augmented by supplementary evidence such as a work sheet or witness statement from a customer.

A Witness Status List and a Witness Statement Form have been included in the portfolio builder pack for you to photocopy and use.

You must ensure that each witness is recorded with a sample signature in the Witness Status List. Only the approved assessor is qualified to judge the evidence. The job of the expert witness is to report to the assessor their observations of the learner's performance.

Assessment for the Diploma

How will my competence be assessed?

Occupational competence can be described as the consistent demonstration of skill, knowledge and understanding, to the standard specified by the assessment criteria for each unit of the work-based qualification. Each unit relates to competence in a different area of activity within a job.

Assessment of your competence will be based upon realistic work place situations, performing purposeful and recognisable tasks which will require a combination of skills and related knowledge.

What is evidence?

Evidence is what you will need to provide in order to prove your competence, your ability to do the job and so meet the standards. You can draw on past experience to provide such evidence as well as collecting evidence from your current job. Your evidence will need to be filed and indexed in a portfolio. You will need to map your evidence to the assessment criteria and present it for assessment when you think each unit is complete.

Most assessment for your work-based qualification will be carried out by your assessor judging the evidence about tasks you have carried out. There are five basic sources of evidence and you may collect evidence from all of them:

Performance at work

Observation in the workplace is an essential source of evidence. Your assessor may watch you working and assess your performance against the unit.

Assessment guidance and examples of evidence have been provided for each assessment criteria in the unit. Evidence may also be provided by witness statements, work records, job sheets, or a diary of your work. In this case, you need to match the evidence provided by witnesses against the unit.

Although evidence can be provided by witnesses, no unit of your work-based qualification can be signed off as complete without the involvement of a qualified assessor to judge the evidence presented.

Performance of specially set tasks

You may be asked to undertake a particular activity, e.g. a simulated task, project or case study, sometimes in a college or other training environment.

Questioning

Questioning may be written or oral, usually occurring as a result of an observed assessment.

Your assessor will ask you questions to make sure you have the necessary knowledge and understanding to carry out your job activities to the required standard.

Historical evidence

You may have done things in the past which are applicable to your work-based qualification. These may be used as evidence, provided that they are sufficiently current and relevant to the qualification standard, e.g. a relevant qualification. This is sometimes known as Accreditation of Prior Learning (APL).

Simulation

Simulation should only be used where it is difficult to collect evidence through a real work situation, the real work environment or within an acceptable time frame. Simulations will usually deal with contingencies such as unexpected problems, emergencies or other incidents, which will not necessarily occur frequently.

Background evidence and previous experience

It is useful to include a copy of your CV, a copy of your previous or current job description, any previous certificates which relate to this qualification.

You can also include performance evidence from previous experiences and achievement

- CV
- Job descriptions
- Certificates
- Records of achievement
- Accounts of experience
- Case studies or projects from previous work
- Licences
- Records of courses attended
- Staff appraisals
- Products
- Endorsements
- Employer references

If you wish to bring forward a large amount of evidence from past experience, please discuss this with your assessor to help you plan the presentation of this evidence.

Observed performance and products of performance

Work is a natural source of evidence and if your work includes the activities described in the assessment criteria for any of the units of the work-based qualification, then your assessor can readily observe you to judge your competence. If the activity covered by a unit is rare and is not likely to occur during the assessment period, then your assessor may advise you to use an alternative source of evidence or arrange a simulated activity for you.

Often there are products from work activities which maybe used as a valuable source of evidence, for example:

- Letters relating to work
- Completed Forms
- Job Sheets
- Plans
- Diaries
- Completed projects, case studies or assignments that are part of your work
- Finished or end products
- Witness statements about your work
- Contact with clients
- Memos
- Reports
- Logbooks
- Checklists
- Tape recordings
- Visual aids/photographs/videos
- Authenticated reports from appropriate personnel, e.g. line managers
- Staff appraisals
- References received
- Witness Statements from clients

Supplementary evidence

In addition to direct observation of your work activities and judging the evidence provided by products of this work and witness testimony, it will be necessary for your assessor to seek supplementary evidence. This may be done by asking you to:

- provide answers to oral or written questions
- attend a professional discussion
- complete written tests
- provide a written personal account to support other evidence.

Portfolio building

The generic document 'Portfolio builder pack for learners and assessors' contains the documents we have produced to help you plan your work and record the evidence. You may not need all of the forms; they are there to help if you need them.

If witness statements are to be used, the witness should complete/amend one line of the Witness Status List, providing a specimen signature.

You must use the evidence summary sheets provided for each element. These allow you to collate all the evidence you have collected for an element and to cross reference evidence from other parts of your portfolio.

Your assessor should complete the 'Record of Units Achieved' as each unit is signed off.

When requested, your portfolio must be available for inspection by the internal verifier and the external verifier during their visits. Only approved assessors and internal verifiers can confirm that you have completed a unit and the assessor completes your 'Record of Units Achieved'.

Supporting Information

The following categories of information are not regarded as Performance Evidence, nor will they meet your requirements to demonstrate your Knowledge and Understanding.

They will however, provide valuable supporting information for you, which should be kept in a separate information file.

This information should not be included as part of the Portfolio of Evidence:

- leaflets or booklets supporting legislative requirements
- the session plans or overall content of training programmes
- any notes or information handouts from training courses
- booklets explaining company operating policy or work procedures, unless they are evidence of systems that you have developed at work
- handbooks describing e.g. how the company computer system works
- technical information about specific products supplied by manufacturers product catalogues.

Publications and resources

City & Guilds provides the following publications and resources specifically for this qualification.

To access these documents, go to the City & Guilds website www.cityandguilds.com. Click on 'Qualifications' and then click on 'Land-based industries'.

Description	How to access
Qualification handbook and assessor guidance This provides the structures of the qualifications and guidance for assessors on the evidence requirements for each unit.	www.cityandguilds.com
Learner guide and logbook This provides guidance for learners and evidence summary sheets for the units within the qualification. It is expected that centres will use these forms. If centres devise or customise alternative forms, including paper-based or electronic methods, they must be approved by the external verifier before they are used by learners and assessors at the centre.	www.cityandguilds.com
Portfolio builder pack for learners and assessors This has a series of recording forms that may be helpful for centres and learners to use. The forms are generic and may be used for any City & Guilds Land Based work-based qualification.	www.cityandguilds.com
Product briefing sheet	www.cityandguilds.com

Level 3 Diploma in Work-based Floristry

0068-31

Unit specifications

All units available are listed below. The rule of combination for the qualification is detailed separately.

Accreditation unit reference	City & Guilds unit number	Unit Title	Level	Credit Value
K/501/7703	301	Negotiate and agree terms and conditions for the sale of floristry products and services	3	5
A/501/7706	302	Plan, assemble and evaluate diverse floral designs	3	12
T/501/7705	303	Plan, assemble and evaluate diverse tied floristry designs	3	12
M/501/7704	304	Plan, assemble and evaluate diverse floral designs for weddings	3	12
F/501/7707	305	Plan, assemble and evaluate diverse funeral designs	3	12
D/502/1523	306	Promote, monitor and maintain health, safety and security of the workplace	3	6
F/501/2989	307	Manage your own resources	2	7
F/501/6413	308	Building working relationships with customers	2	2
M/601/1511	309	Resolve customer service problems	2	6
M/600/9712	310	Manage the environmental impact of work activities	4	5
L/500/9786	311	Maintain the availability of goods for sale to customers in a retail environment	3	11
Y/601/1230	312	Organise the delivery of reliable customer service	3	6
H/601/1554	313	Promote continuous improvement	3	7
H/601/1568	314	Lead a team to improve customer service	3	7
L/500/5205	315	Source required goods and services in a retail environment	3	10

Rule of Combination for the Level 3 Diploma in Work-based Floristry (0068-31)

0068-31 Level 3 Diploma in Work-based Floristry	
Rules for achievement of qualification	Mandatory 66 credits of (301 - 307) Plus minimum 2 credits from (308 - 315)

Advanced Apprenticeship Framework Information

From 1 April 2011 the Advanced Apprenticeship Framework for Floristry (England) changed.

The Independent Assessment element, which was previously a dated entry examination, has now been replaced by individual knowledge based qualifications. The City & Guilds options available for this qualification are listed below.

Qualification title and level	City & Guilds qualification number	Ofqual accreditation number
Level 3 Certificate in Retail Knowledge	1013-32	500/7350/3
Level 3 Certificate in Customer Service	4417-03	500/6206/2
Level 3 Award in Business for the Environment and Land-based Sector	0070-35	500/9232/7

Centres offering the apprenticeship will also require scheme approval for the appropriate individual knowledge based qualification.

City & Guilds will continue to offer the dated entry exam 0068-501 to existing learners until June 2011.

Appeals and Equal opportunities

Centres must have their own auditable, appeals procedure. If a learner is not satisfied with the examination conditions or a learner feels that the opportunity for examination is being denied, the Centre Manager should, in the first instance, address the problem. If, however, the problem cannot be resolved, City & Guilds will arbitrate and an external verifier may be approached to offer independent advice. All appeals must be clearly documented by the Centre Manager and made available to the external verifier or City & Guilds if advice is required.

Should occasions arise when centres are not satisfied with any aspect of the external verification process, they should contact their City & Guilds local office.

Access to the qualification is open to all, irrespective of gender, race, creed, age or special needs. The Centre Manager should ensure that no learner is subjected to unfair discrimination on any grounds in relation to access to assessment and to the fairness of the assessment. Ofqual requires City & Guilds to monitor centres to check whether equal opportunities policies are being adhered to.

For learners with particular requirements, centres should refer to City & Guilds' policy document *Access to Assessment and Qualifications*, which is available from **www.cityandguilds.com**

The units

As units are signed off as completed, the record of units achieved pro-forma should be updated

How to use the Evidence Recording Sheets

There is a column alongside the assessment criteria. In this Qualification handbook this column is used for assessor guidance. In the Learner's Guide this column is used for recording the evidence. Records of direct observation may be written directly into this column or, if the evidence is on a separate document, the reference of where the evidence can be found should be entered here. If the evidence is cross referenced to elsewhere in the Learner Guide and Logbook then the reference to where it may be found should be inserted. For underpinning knowledge criteria, the answers may be written in directly or completed on a separate page which can be referenced in the normal way.

Below is an example of how a recording sheet may look, with entries by the Learner, the supervisor and the assessor. Although several people may enter information here, it remains the responsibility of the assessor to judge the evidence presented is sufficient, authentic and valid.

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Exemplar unit

TITLE	Maintain and develop personal performance	Learner's name Tom Goodboy
UAN REFERENCE	F/502/1689	
LEVEL	2	
CREDIT VALUE	2	
<p>The aim of this unit is to provide the learner with the knowledge and skills to be able to agree and develop their own personal performance with an appropriate person.</p> <p>The learner will maintain and develop personal performance with regard to:</p> <ul style="list-style-type: none"> (i) working to targets and completing specific tasks (ii) quality of work <p>Evidence from a staff appraisal or review is appropriate, where targets are set and agreed.</p> <p>Relationship to National Occupational Standards : CU5.1</p>		

Learner Outcomes	Assessment Criteria	For inserting direct evidence or referencing to where the evidence can be found
The learner will:	The learner can:	
1. Maintain personal performance	1.1 Identify current competence and areas for development using relevant techniques and processes	Current competence was identified via self assessment and discussion at appraisal interview on 25 th June 2008. Identified that updating on current legislation and first aid training are required. See evidence ref 1
	1.2 Carry out work in accordance with responsibilities and organisational requirements	Tom is carrying out his duties to the high standard required by the company. He understands company policies and procedures for setting out work, the standard of work required and meeting targets agreed with customers. He arrives on site with required PPE and clean company uniform, giving a good impression of the company to customers. AB 25 th September 2008. Visited Tom on site at 36 High Street. He was fully aware of what the job entailed. His work site was tidy and the customer was very satisfied with the work accomplished so far. ANO

Exemplar unit

2. Develop personal performance	2.1 Agree personal performance and targets with an appropriate person	Personal targets set on 25 th June 2008. See evidence ref 1
	2.2 Review performance and progress regularly and use the outcome to plan future development activities	Performance is reviewed every 3 months. See update 30 th September 2008. Evidence ref 2
	2.3 Seek advice from an appropriate person if clarification is required concerning specific tasks	Tom asked about access to neighbouring land when working on the boundary at 46 Church Lane on 14 th July 2008. AB Tom asked for clarification of the order of work at 25 Common Lane on 30 th August 2008 AB
	2.4 Seek constructive feedback and advice from others and use it to help maintain and improve performance	Feedback from June has been acted on. Tom has improved his timekeeping since his appraisal. He is working in a more methodical way since our discussion, so that his work area is tidier and safer for Tom and the customers. It also gives a better impression of the company. Although Tom works well on his own initiative, Tom seeks feedback from me if ever he is unsure what is required of him. Alan Boss 20 th October 2008
3. Know how to develop personal performance	3.1 State own limits of responsibility in relation to specific tasks and activities	I have to arrive at the customer's address at the specified time and behave in a manner that gives a good impression to customers. I have to work tidily and steadily and do the jobs in the right order and do them how Joe and Alan have shown me. I have to avoid causing any unnecessary damage to the site and clear up any mess promptly. On longer jobs, I have to make sure I am not leaving hazards unguarded overnight.

Exemplar unit

	3.2 State who to obtain advice from in relation to specific tasks and activities	Straight forward tasks, I refer to my colleague Joe. More complex things to my supervisor Alan.
	3.3 List the correct procedures for obtaining advice	Initially I ask my colleague Joe, who has been here 5 years, then my supervisor Alan, if Joe can't help. If Alan cannot advise me he tells me where to find the advice or finds out the answer for me.
	3.4 State the risks involved in not obtaining advice where specific tasks and activities are unclear	Safety may be put at risk or the job might not be done how the company or customer wants it to be done
	3.5 Describe how to determine and agree development needs and personal targets	We do this formally at appraisal meeting and 3 monthly reviews. I fill in a self assessment form and then discuss this with Alan.
	3.6 State why personal performance should be reviewed	So that I can improve in my job and advance my career. So that the company has well trained staff that can meet customers' needs and expectations.

Exemplar unit

Learner's signature

I confirm that the evidence above is all my own work

Tom Goodboy Date 31st October 2008.

Assessor's name **A.N.Other**

I confirm that the evidence for this unit is complete and meets the requirements for validity, authenticity and sufficiency.

Signed **A N Other** Date 31st October 2008.

Internal verifier's signature (if sampled)

.....Date.....

In the example above, Alan Boss is the Learner's supervisor, Anthony Other is the assessor and Tom Goodboy is the Learner. All 3 can complete sections of the Learner's logbook. Supplementary evidence needs to be referenced as in previous NVQ qualifications. Eg in the example above the Learner's Appraisal current skills and action plan would be referenced as Evidence 1. The update form from 30th September would be evidence ref 2.

Guidance on the unit is given at the top. Any items of scope are dealt with within the assessment criteria: they do not have to be recorded separately. Alan Boss, and anyone else except the Learner and the assessor, would need to complete a line on the Witness status list.

Unit 301

TITLE	Negotiate and agree terms and conditions for the sale of floristry products and services	Learner's name
UAN REFERENCE	K/501/7703	
LEVEL	3	
CREDIT VALUE	5	
<p>The aim of this unit is to provide the learner with the knowledge, understanding and skills required to take responsibility for identifying and agreeing customer requirements when negotiating the sale of floristry products. Customer requirements will include; single items and small groups, single arrangements and displays, and multiple products and services for events (e.g. weddings, funerals etc).</p> <p>Additional guidance for this unit: Learner to include evidence from a variety of occasions when flowers are needed e.g. weddings, births, funerals and festive occasions.</p> <p>Relationship to National Occupational Standards: FL6.1, 6.2</p>		

Learner Outcomes	Assessment Criteria	For inserting direct evidence or referencing to where the evidence can be found
The Learner will :	The learner can :	
1. Be able to discuss the customer requirements	1.1 Provide customer care in accordance with the business procedures	
	1.2 Identify and record the customer's exact requirements through discussion, questioning, sketches and pictures	
	1.3 Ascertain the customer's budget for the work and discuss viability	

Unit 301

2. Be able to agree the customers requirements	2.1 Select and recommend the best design type to meet customer requirements, occasion and budget, suggest necessary modifications	
	2.2 Assess and maximise upon the opportunity for selling-up and/or add-on sales, if appropriate	
	2.3 Estimate the amount of time it will take to complete the design	
	2.4 Estimate the cost of the design and communicate this clearly to the customer	
	2.5 Confirm the final design and cost of the work with the customer	
	2.6 Produce a written estimate and a quotation to send out to a customer	
3. Price products and services	3.1 Price diverse products and services and calculate appropriate profit margins and VAT	
4. Understand the principles of design	4.1 Explain the basic principles of a design schema and its benefits in planning floral designs covering: order categories, styles of design	

Unit 301

5. Understand the importance of discussing and agreeing customer requirements	5.1 Identify the information needed when taking complex customer orders: Client details, recipient details, design requirements, delivery instructions, special instructions, payment method	
	5.2 Explain how cultural differences and practices affect requirements and preferences for floristry products and services	
	5.3 Explain how seasonal availability of fresh materials can influence the advice given to customers regarding selection, suitability, and value	
	5.4 Explain why it is important to outline the additional services available to the customer and what they cost	
	5.5 Explain how to identify and interpret the requirements of a design from information provided by customers (such as photographs or mementos)	
6. Understand the principles of pricing	6.1 Explain the variables that influence the calculation of an estimated price for a complex design: materials, labour, profit	
	6.2 Explain the difference between a quotation and an estimate	
7. Understand the business policies and procedures	7.1 Explain the business procedures regarding customer care	

Unit 301

	7.2 Describe business policy on terms and conditions of sale and methods of payment, including, the requirements for deposits or advance payment, and credit arrangements	
	7.3 Explain the procedure that should be followed when managing a client problem or complaint	
8. Know the relevant legislation and codes of practice	8.1 State current safe working practices and responsibilities contained within relevant legislation	

Learner's signature

I confirm that the evidence above is all my own work

..... Date

Assessor's name

..... I confirm that the evidence for this unit is complete and meets the requirements for validity, authenticity and sufficiency.

Signed.....Date

Internal verifier's signature (if sampled)

.....Date

Unit 302

TITLE	Plan, assemble and evaluate diverse floral designs	Learner's name
UAN REFERENCE	A/501/7706	
LEVEL	3	
CREDIT VALUE	12	
<p>The aim of this unit is to provide the learner with the knowledge, understanding and skills required to be responsible for constructing floristry designs with medium. It covers planning, preparing materials, selecting methods and tools for the work, and constructing the floristry designs with medium. The designs and services covered by this unit may be standard, adapted or customised.</p> <p>Additional guidance for this unit: Learner to include a minimum of 10 designs of which one should be a planted arrangement. The designs should cover decorative, form-linear and vegetative styles.</p> <p>Relationship to National Occupational Standards: FL7.1, 7.2, 7.3</p>		

Learner Outcomes	Assessment Criteria	For inserting direct evidence or referencing to where the evidence can be found
The Learner will :	The learner can :	
1. Plan diverse floral designs	1.1 Assess the customer's design requirements from available information	
	1.2 Produce plans and design sketches which are accurate, realistic, and based on valid and reliable information	
	1.3 Calculate the retail cost of diverse floral arrangements, (or the budget for components if the retail price is established in advance)	

Unit 302

2. Assemble floral designs	2.1	Select floral materials that are correctly conditioned, suitable for the customer's needs, the design, the budget, lasting qualities and seasonal availability	
	2.2	Select and correctly prepare appropriate sundries, mediums, and containers / bases	
	2.3	Construct specified designs in line with decorative, form-linear, or vegetative design principles as appropriate	
	2.4	Select and utilise a minimum of 8 traditional and/or non-traditional techniques effectively within floral designs, to include: grouping, veiling, terracing, caging, framing, shadowing, sheltering, zoning	
	2.5	Review the developing design against the specification and make any modifications which are necessary within the terms of the design requirements	
	2.6	Attach floral and other materials securely	
	2.7	Optimise two diverse floral arrangements via the use of packaging materials and trims for presentation, protection and transport	
	2.8	Complete the floral designs within commercial timescales and in a way that minimises waste	

Unit 302

	2.9 Maintain appropriate records that are accurate, legible and stored correctly	
3. Use tools safely	3.1 Handle tools, materials, and equipment safely and in a manner that minimises wastage, damage and contamination	
4. Evaluate the floral design	4.1 Evaluate the completed design against the specification, including budget, content, occasion, design style, client requirements and make any necessary final adjustments	
5. Understand how to plan and evaluate floral designs	5.1 Explain how to identify and resolve complex customer/ order requirements	
	5.2 Evaluate the suitability of a diverse range of floral and non-floral materials when planning specified designs	
	5.3 State the criteria used to evaluate designs against customer order	
	5.4 Evaluate changes to work practices that will improve business sustainability and reduce waste	
6. Understand how to assemble floral designs	6.1 Explain the design characteristics of decorative, form-linear (parallel and horizontal), and vegetative design styles	
	6.2 Explain the features of diverse floral designs using the principles and elements of design	

Unit 302

	6.3 Explain the reasons and methods for supporting vulnerable materials within floral designs to include: wiring, tying, binding	
	6.4 Evaluate viable methods of assembly for standard, adapted, and customised designs	
	6.5 Explain how the use of non-traditional methods can aid innovation when creating floral designs	
	6.6 Explain the contribution that others can make to support the preparation and assembly of diverse floral designs	
7. Know how the environment affects materials	7.1 State the effect of temperature, light, ventilation and preservatives on the development of materials inserted into floral mediums and the physiological reasons for these effects	
8. Know the relevant legislation and codes of practice	8.1 Describe the safe working practices to be used for assembly, manual handling and transportation of diverse floral designs	
	8.2 State current safe working practices and responsibilities contained within relevant legislation	

Unit 302

Learner's signature

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..... Date

Assessor's name

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Unit 303

TITLE	Plan, assemble and evaluate diverse tied floristry designs	Learner's name
UAN REFERENCE	T/501/7705	
LEVEL	3	
CREDIT VALUE	12	
<p>The aim of this unit is to provide the learner with the knowledge, understanding and skills required to take responsibility for planning, assembling and evaluating tied floral designs. The designs will be decorative, form linear and vegetative.</p> <p>Additional guidance for this unit: Learner to produce a minimum of six designs to include form-linear, vegetative and decorative styles.</p> <p>Relationship to National Occupational Standards: FL8.1,2,3</p>		

Learner Outcomes	Assessment Criteria	For inserting direct evidence or referencing to where the evidence can be found
The Learner will :	The learner can :	
1. Plan diverse tied floral designs	1.1 Assess the customer's design requirements from available information	
	1.2 Produce plans and design sketches which are accurate, realistic, and based on valid and reliable information	
	1.3 Calculate the retail cost of diverse tied designs, (or the budget for components if the retail price is established in advance)	

Unit 303

2. Assemble diverse tied designs	2.1	Select floral materials that are correctly conditioned, suitable for the design, appropriate to the customer's needs, the budget, lasting qualities, and seasonal availability	
	2.2	Select and correctly prepare appropriate materials for collars and frameworks	
	2.3	Assemble collars and frameworks firmly and securely	
	2.4	Construct specified designs to a high technical standard in line with decorative, form-linear, or vegetative design principles as appropriate	
	2.5	Select and utilise a minimum of 8 traditional and/or non-traditional techniques effectively within tied designs, to include: grouping, binding, veiling, banding, caging, framing, shadowing, sheltering	
	2.6	Review the developing design against the specification and make any modifications which are necessary within the terms of the design requirements	
	2.7	Optimise four diverse tied designs via the use of packaging materials and trims for presentation, protection and transport	

Unit 303

	2.8 Complete tied designs within commercial timescales and in a way that minimises waste	
	2.9 Maintain appropriate records that are accurate, legible and stored correctly	
3. Evaluate tied designs	3.1 Evaluate the completed design against the specification, (budget, content, occasion, design style, client requirements), and make any necessary final adjustments	
4. Use tools safely	4.1 Handle tools, materials, and equipment safely and in a manner that minimises wastage, damage and contamination	
5. Understand how to plan and evaluate tied floral designs	5.1 Explain how to identify and resolve complex customer/ order requirements	
	5.2 Evaluate the suitability of a diverse range of floral and non-floral materials when planning specified designs	
	5.3 State the criteria used to evaluate designs against the customer order	
	5.4 Identify improvements to work practices that will improve business sustainability and reduce waste	
6. Understand how to assemble tied designs	6.1 Explain the design characteristics of all the following: Tied designs - decorative Tied designs - form-linear Tied designs - vegetative styles (parallel, bridal, seasonal)	

Unit 303

	6.2 Explain the features of diverse tied designs using the principles and elements of design	
	6.2 Explain the reasons and methods for supporting vulnerable materials within tied designs, to include: wiring, tying, binding, and use of frameworks	
	6.4 Evaluate viable methods of assembly for standard, adapted, and customised designs	
	6.5 Explain how the use of non-traditional methods can aid innovation when creating tied designs	
	6.6 Explain the contribution that others can make to support the preparation and assembly of diverse tied designs	
	6.7 State the effect of temperature, light, ventilation and preservatives on the development of tied materials and the physiological reasons for these effects	
7. Know the relevant legislation and codes of practice	7.1 Describe the safe working practices to be used for assembly, manual handling and transportation of diverse floral designs	
	7.2 State current safe working practices and responsibilities contained within relevant legislation	

Unit 303

Learner's signature

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Unit 304

TITLE	Plan, assemble and evaluate diverse floral designs for weddings	Learner's name
UAN REFERENCE	M/501/7704	
LEVEL	3	
CREDIT VALUE	12	
<p>The aim of this unit is to provide the learner with the knowledge, understanding and skills required to take responsibility for planning, assembling and evaluating diverse floral designs for weddings. The designs will be standard designs, adapted standard designs and customised designs.</p> <p>Additional guidance for this unit: Learner to produce 10 diverse designs suitable for weddings. Designs will be assembled using floral foam, wire, glue technique, foam holder and structures/framework. Designs to include form-linear, vegetative and decorative styles.</p> <p>Relationship to National Occupational Standards: FL9.1,9.2,9.3</p>		

Learner Outcomes	Assessment Criteria	For inserting direct evidence or referencing to where the evidence can be found
The Learner will :	The learner can :	
1. Be able to plan diverse floral designs for weddings	1.1 Assess the customer's design requirements from available information	
	1.2 Produce plans and design sketches which are accurate, realistic, and based on valid and reliable information	
	1.3 Calculate the retail cost of diverse floral designs for weddings, (or the budget for components if the retail price is established in advance)	

Unit 304

2. Be able to assemble diverse floral designs for weddings	2.1 Select floral materials that are correctly conditioned, suitable for the design, the budget, lasting qualities, and seasonal availability	
	2.2 Select and correctly prepare appropriate sundries, mediums, and structures	
	2.3 Construct specified designs to a high technical standard in line with decorative, form-linear, or vegetative design principles as appropriate	
	2.4 Select and utilise wiring and taping techniques effectively within floral designs for weddings, to include: mount wiring (single & double leg), support wiring, loop stitch, branched units, natural units, ribbed units, feathering, binding	
	2.5 Select and utilise a minimum of 6 manipulation techniques effectively within floral designs for weddings, to include: gluing, cupping, rolling, plaiting, threading	
	2.6 Review the developing design against the specification and make any modifications which are necessary within the terms of the design requirements	
	2.7 Incorporate appropriate accessories securely	

Unit 304

	2.8 Incorporate appropriate fixing methods within designs to facilitate ease & security of attachment	
	2.9 Optimise a bridal bouquet via the use of packaging materials and trims for presentation, protection and transport	
	2.10 Complete floral designs for weddings within commercial timescales and in a way that minimises waste	
	2.11 Maintain appropriate records that are accurate, legible and stored correctly	
3. Use tools safely	3.1 Handle tools, materials, and equipment safely and in a manner that minimises wastage, damage and contamination	
4. Be able to evaluate diverse floral designs for weddings	4.1 Evaluate the completed design against the specification, including budget, content, occasion, design style, client requirements, and make any necessary final adjustments	
5. Understand how to plan and evaluate floral designs for weddings	5.1 Explain how to identify and resolve complex customer/ order requirements	
	5.2 Evaluate the suitability of a diverse range of floral and non-floral materials when planning specified designs	
	5.3 State the criteria used to evaluate designs against customer order	
	5.4 Evaluate changes to work practices that will improve business sustainability and reduce waste	

Unit 304

6. Understand how to assemble floral designs for weddings	6.1 Explain the design characteristics of decorative, form-linear, and vegetative design styles	
	6.2 Explain the features of diverse floral designs for weddings using the principles and elements of design	
	6.3 Explain the reasons and methods for supporting vulnerable materials within floral designs for weddings, to include: wiring, binding, gluing	
	6.4 Evaluate viable methods of assembly for standard, adapted, and customised designs	
	6.5 Explain how the use of non-traditional methods can aid innovation when creating floral designs for weddings	
	6.6 Explain the contribution that others can make to support the preparation and assembly of diverse floral designs for weddings	
7. Know the relevant legislation and codes of practice	7.1 Describe the safe working practices to be used for assembly, manual handling and transportation of diverse floral designs	
	7.2 State current safe working practices and responsibilities contained within relevant legislation	

Unit 304

Learner's signature

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Unit 305

TITLE	Plan, assemble and evaluate diverse funeral designs	Learner's name
UAN REFERENCE	F/501/7707	
LEVEL	3	
CREDIT VALUE	12	

The aim of this unit is to provide the learner with the knowledge, understanding and skills required to take responsibility for planning, assembling and evaluating floral tributes. The designs will be decorative, form linear and vegetative.

Additional guidance for this unit: Learners to produce 12 diverse formal and informal designs, which include both traditional and contemporary styles and techniques. A minimum of one design is to be biodegradable, a further design should be three dimensional.

Relationship to National Occupational Standards: n/a

Learner Outcomes	Assessment Criteria	For inserting direct evidence or referencing to where the evidence can be found
The Learner will :	The learner can :	
1. Plan diverse floral tributes	1.1 Assess the customer's design requirements from available information	
	1.2 Produce plans and design sketches which are accurate, realistic, and based on valid and reliable information	
	1.3 Calculate the retail cost of diverse floral tributes, (or the budget for components if the retail price is established in advance)	

Unit 305

2. Assemble diverse floral tributes	2.1 Select floral materials that are correctly conditioned and appropriate to the customer's needs, the selected design, the budget, lasting qualities, and seasonal availability	
	2.2 Select and correctly prepare appropriate sundries, mediums, and containers / bases	
	2.3 Construct specified designs to a high technical standard in line with decorative, form-linear, or vegetative design principles as appropriate	
	2.4 Select and utilise a minimum of 8 traditional and/or non-traditional techniques to create floral designs, to include: basing, clustering, layering, pave, pleating, pillowing, pinning, stapling	
	2.5 Review the developing design against the specification and make any modifications which are necessary within the terms of the design requirements	
	2.6 Attach floral and other materials securely.	
	2.7 Complete floral tributes within commercial timescales and in a way that minimises waste	
	2.8 Maintain appropriate records that are accurate, legible and stored correctly	

Unit 305

3. Evaluate floral tributes	3.1 Evaluate the completed design against the specification, (budget, content, occasion, design style, client requirements), and make any necessary final adjustments	
4. Use tools safely	4.1 Handle tools, materials, and equipment safely and in a manner that minimises wastage, damage and contamination	
5. Understand how to plan and evaluate floral tributes	5.1 Explain how to identify and resolve complex customer/ order requirements	
	5.2 Evaluate the suitability of a diverse range of floral and non-floral materials when planning specified designs	
	5.3 State the criteria used to evaluate designs against the customer order	
	5.4 Evaluate changes to work practices that will improve business sustainability and reduce waste	
6. Understand how to assemble diverse floral tributes	6.1 Explain the design characteristics of decorative, form-linear, and vegetative design styles	
	6.2 Explain the features of diverse floral tributes using the principles and elements of design	
	6.3 Explain the reasons and methods for supporting vulnerable materials within floral tributes, to include: wiring, tying, binding	

Unit 305

	6.4 Evaluate viable methods of assembly for standard, adapted, and customised designs	
	6.5 Explain how the use of non-traditional methods can aid innovation when creating floral tributes	
	6.6 Explain the contribution that others can make to support the preparation and assembly of diverse floral tributes	
7. Know how the environment affects materials	7.1 State the effect of temperature, light, ventilation and preservatives on the development of materials inserted into floral mediums and the physiological reasons for these effects	
8. Know the relevant legislation and codes of practice	8.1 Describe the safe working practices to be used for assembly, manual handling and transportation of diverse floral designs	
	8.2 State current safe working practices and responsibilities contained in relevant legislation	

Unit 305

Learner's signature

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..... Date

Assessor's name

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Unit 306

TITLE	Promote, monitor and maintain health, safety and security of the workplace	Learner's name
UAN REFERENCE	D/502/1523	
LEVEL	3	
CREDIT VALUE	6	
<p>The aim of this unit is to provide the learner with the knowledge, understanding and skills required for monitoring and maintaining the safety and security of the workplace. It also covers carrying out risk assessments, promoting good standards of health and safety and understanding how to deal with any accidents or health emergencies.</p> <p>Relationship to National Occupational Standards: O29NCU3.1, 2, 3</p>		

Learner Outcomes	Assessment Criteria	For inserting direct evidence or referencing to where the evidence can be found
The Learner will :	The learner can :	
1. Understand how to monitor and maintain the health, safety and security of the work area	1.1 Explain the legal and organisational responsibilities in relation to health, safety and security covering: (i) people (ii) equipment and materials (iii) the work area	
	1.2 Explain the importance of carrying out risk assessments for all work activities including assessing risks from new and non-routine activities	

Unit 306

	1.3	Explain the importance of assessing security issues associated with the work area covering: (i) bio security (ii) building security (iii) data security (iv) personal security	
	1.4	Describe how to carry out and evaluate a risk assessment	
	1.5	Explain the hierarchy of measures to control risks (including elimination, substitution, relevant engineering controls, safe systems of work, training/instruction and personal protective equipment)	
	1.6	Outline safe systems of work when people are working alone or at risk of abuse	
	1.7	Explain safe methods and systems of working with hazardous materials and equipment in line with relevant legislation	
	1.8	Explain how hazardous and non-hazardous waste should be managed in line with legislation	
2. Understand how to promote good standards of health and safety	2.1	Explain the methods of communicating health and safety precautions to others entering the work area	

Unit 306

	2.2 Explain how good standards of health and safety contribute to the management and efficiency of businesses or organisations	
3. Understand how to deal with health emergency situations	3.1 Describe the types of accidents or incidents which may occur and the correct actions to take	
	3.2 Explain the importance of not carrying out actions beyond own capabilities	
	3.3 Explain the potential risks to others from an emergency situation	
	3.4 Explain the reasons for offering support and help to others involved in the accident or incident and how this should be achieved	
4. Understand the records required and their importance	4.1 Explain the responsibility for and types of records required and the importance of accurate record keeping	
	4.2 Explain the relevant legislative requirements for completing records of accidents and incidents	
5. Monitor and maintain the health, safety and security of the work area	5.1 Carry out risk assessments in accordance with relevant legal and organisational requirements	
	5.2 Evaluate the risks which have been identified and implement appropriate control measures	

Unit 306

6. Promote good standards of health and safety	6.1 Ensure appropriate clothing and protective equipment is worn which is consistent with recognised health and safety practice and in line with risk assessment	
	6.2 Communicate any health and safety precautions that are being applied in the work area to others entering the area	
	6.3 Use approved safe methods of lifting and handling when carrying out work	
	6.4 Ensure standard procedures for personal hygiene are followed at all times	
	6.5 Adopt safe systems of work which are consistent with organisational procedures and the findings of the risk assessment	
	6.6 Take appropriate action if there is a danger of accidents or injury	
7. Respond to health emergencies within the work area	7.1 Implement procedures safely, correctly and without delay in an emergency situation	
	7.2 Summon assistance immediately for any health emergency and initiate action appropriate to the condition and situation	
	7.3 Give assistance as required within the limits of your capability, including suitable verbal support	

Unit 306

	7.4 Make the immediate vicinity as safe as possible	
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Learner's signature

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Assessor's name

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Unit 307

TITLE	Manage your own resources	Learner's name
UAN REFERENCE	F/501/2989	
LEVEL	2	
CREDIT VALUE	7	
<p>This unit is mainly about making sure learners have the personal resources (particularly knowledge, understanding, skills and time) to undertake their work role and reviewing their performance against agreed objectives. It also covers identifying and undertaking activities to develop their knowledge, skills and understanding where gaps have been identified.</p> <p>Relationship to National Occupational Standards: Direct Match to M & L standards 2004</p>		

Learner Outcomes	Assessment Criteria	For inserting direct evidence or referencing to where the evidence can be found
The Learner will :	The learner can :	
1. Manage their own resources	1.1 Identify and agree the requirements of their work-role with those they report to	
	1.2 Discuss and agree personal work objectives with those they report to and how they will measure progress	
	1.3 Identify any gaps between the requirements of their work-role and their current knowledge, understanding and skills	
	1.4 Discuss and agree, with those they report to, a development plan to address any identified gaps in their current knowledge, understanding and skills	

Unit 307

	1.5 Undertake the activities identified in their development plan and discuss, with those they report to, how they have contributed to their performance	
	1.6 Get regular and useful feedback on their performance from those who are in a good position to judge it and provide you with objective and valid feedback	
	1.7 Discuss and agree, with those they report to, any changes to their personal work objectives and development plan in the light of performance, feedback received, any development activities undertaken and any wider changes	
	1.8 Check, on a regular basis, how they are using their time at work and identify possible improvements	
	1.9 Ensure that their performance consistently meets or goes beyond agreed requirements	
2. Use appropriate behaviours to manage their own resource	2.1 Demonstrate that they recognise changes in circumstances promptly and adjust plans and activities accordingly	
	2.2 Demonstrate that they prioritise objectives and plan work to make best use of time and resources	

Unit 307

	2.3	Demonstrate that they take personal responsibility for making things happen	
	2.4	Demonstrate that they take pride in delivering high quality work	
	2.6	Demonstrate that they agree achievable objectives for themselves and give a consistent and reliable performance	
	2.6	Demonstrate that they can find practical ways to overcome barriers	
	2.7	Demonstrate that they make best use of available resources and proactively seek new sources of support when necessary	
3. Know and understand how to manage their own resources using general knowledge	3.1	Demonstrate why managing their resources (particularly knowledge, understanding, skills and time) is important	
	3.2	Demonstrate how to identify the requirements of a work-role	
	3.3	Demonstrate how to set work objectives which are SMART (Specific, Measurable, Achievable, Realistic and Time-bound)	
	3.4	Demonstrate how to measure progress against work objectives	

Unit 307

	3.5 Demonstrate how to identify development needs to address any identified gaps between the requirements of their work-role and their current knowledge, understanding and skills	
	3.6 Demonstrate what an effective development plan should contain	
	3.7 Demonstrate the type of development activities which can be undertaken to address identified gaps in knowledge, understanding and skills	
	3.8 Demonstrate how to identify whether/how development activities have contributed to their performance	
	3.9 Demonstrate how to get and make effective use of feedback on their performance	
	3.10 Demonstrate how to update work objectives and development plans in the light of performance, feedback received, any development activities undertaken and any wider changes	
	3.11 Demonstrate how to record the use of their time and identify possible improvements	
4. Know and understand how to manage their own resources using industry and sector specific knowledge	4.1 Show that they know and understand the industry/sector requirements for the development or maintenance of knowledge, understanding and skills	

Unit 307

5. Know and understand how to manage their own resources using context specific knowledge	5.1	Show that they know the agreed requirements of their work-role including the limits of their responsibilities	
	5.2	Show that they know their agreed personal work objectives	
	5.3	Show that they know the reporting lines in their organisation	
	5.4	Show that they know and understand their current knowledge, understanding and skills	
	5.5	Show that they can identify gaps in their current knowledge, understanding and skills	
	5.6	Show that they know and understand their personal development plan	
	5.7	Show that they know their organisation's policy and procedures in terms of personal development	
	5.8	Show that they know the available development opportunities and resources in their organisation	
	5.9	Show that they understand possible sources of feedback in their organisation	

Unit 307

Learner's signature

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Unit 308

TITLE	Building working relationships with customers	Learner's name
UAN REFERENCE	F/501/6413	
LEVEL	2	
CREDIT VALUE	2	
<p>In this unit learners will be introduced to the concept of customer service standards and the way in which organisations ensure their delivery through the use of protocols.</p> <p>Relationship to National Occupational Standards: This qualification is based on the CBI employment competencies</p>		

Learner Outcomes	Assessment Criteria	For inserting direct evidence or referencing to where the evidence can be found
The Learner will :	The learner can :	
1. Understand how a customer's or client's interactions with employees influence their opinion of the organisation as a whole	1.1 Explain how an employee's self-presentation can affect a customer's opinion of the individual and their organisation	
	1.2 Explain why keeping customers satisfied is important to organisations	
2. Understand why organisations normally have protocols for dealing with customers	2.1 Describe the key areas likely to be contained in a customer service protocol	
	2.2 Explain why it is important for employees to follow customer service protocols	

Unit 308

3. Interact positively with customers in line with given protocols	3.1 Follow an organisation's protocols to provide answers to commonly-occurring customer queries or meet commonly-occurring customer requests	
	3.2 Communicate appropriately with customers	
	3.3 Explain the procedures within an organisation for dealing with customer problems and complaints	
	3.4 Describe when it would be necessary to involve colleagues in assisting the customer	

Unit 308

Learner's signature

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Unit 309

TITLE	Resolve customer service problems	Learner's name
UAN REFERENCE	M/601/1511	
LEVEL	2	
CREDIT VALUE	6	

This unit is all about what the learner does when it is difficult to meet customer expectations. Even if the service the learner gives is excellent, some customers will still experience problems and the learner must help to resolve those problems.

Relationship to National Occupational Standards: This Unit directly relates to the Customer Service NOS.

Learner Outcomes	Assessment Criteria	For inserting direct evidence or referencing to where the evidence can be found
The Learner will :	The learner can :	
1. Spot customer service problems	1.1 Listen carefully to customers about any problem they have raised	
	1.2 Ask customers about the problem to check their understanding	
	1.3 Recognise repeated problems and alert the appropriate authority	
	1.4 Share customer feedback with others to identify potential problems before they happen	
	1.5 Identify problems with systems and procedures before they begin to affect customers	

Unit 309

2. Pick the best solution to resolve customer service problems	2.1 Identify the options for resolving a customer service problem	
	2.2 Work with others to identify and confirm the options to resolve a customer service problem	
	2.3 Work out the advantages and disadvantages of each option for their customer and the organisation	
	2.4 Pick the best option for their customer and the organisation	
	2.5 Identify for their customer other ways that problems may be resolved if they are unable to help	
3. Take action to resolve customer service problems	3.1 Discuss and agree the options for solving the problem with their customer	
	3.2 Take action to implement the option agreed with their customer	
	3.3 Work with others and their customer to make sure that any promises related to solving the problem are kept	
	3.4 Keep their customer fully informed about what is happening to resolve problem	
	3.5 Check with their customer to make sure the problem has been resolved to the customer's satisfaction	
	3.6 Give clear reasons to their customer when the problem has not been resolved to the customer's satisfaction	

Unit 309

4. Know and understand how to resolve customer service problems	4.1 Describe organisational procedures and systems for dealing with customer service problems	
	4.2 Explain how to defuse potentially stressful situations	
	4.3 Describe how to negotiate	
	4.4 Identify the limitations of what they can offer their customer	
	4.5 Describe types of action that may make a customer problem worse and should be avoided	

Learner's signature

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Unit 310

TITLE	Manage the environmental impact of work activities	Learner's name
UAN REFERENCE	M/600/9712	
LEVEL	4	
CREDIT VALUE	5	
<p>This unit covers the competence that hospitality supervisors need to manage the environmental impact of work activities in their area of responsibility.</p> <p>Relationship to National Occupational Standards: Management Standards Centre NOS 2007: E9 Manage the environmental impact of your work</p>		

Learner Outcomes	Assessment Criteria	For inserting direct evidence or referencing to where the evidence can be found
The Learner will :	The learner can :	
1. Understand the legal requirements and environmental policies that impact on own area of responsibility	1.1 Explain the legal requirements that impact on own area of responsibility	
	1.2 Explain the environmental policies that impact on own area of responsibility	
2. Understand how to assess the impact of work activities on the environment and how this can be minimised	2.1 Explain what specialist advice is available to manage the environmental impact of work activities	
	2.2 Explain how to assess the impact of work activities and resources on the environment	
	2.3 Explain how to minimise the environmental impact of work activities	

Unit 310

3. Be able to assess and report on the environmental impact of work activities in own area of responsibility	3.1 Assess the environmental impact of work activities and resource use	
	3.2 Produce a report on the environmental impact of work activities and resource use, with recommendations for improvement	
4. Be able to organise work activities and resource use to minimise environmental impact	4.1 Adapt the use of resources in own area of responsibility to reduce environmental impact	
	4.2 Organise activities in own area of responsibility to reduce environmental impact	
5. Be able to promote ongoing improvement in environmental performance	5.1 Establish means by which individuals can identify and report opportunities for improving environmental performance	
	5.2 Communicate environmental benefits resulting from changes to work activities	

Unit 310

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Unit 311

TITLE	Maintain the availability of goods for sale to customers in a retail environment	Learner's name
UAN REFERENCE	L/500/9786	
LEVEL	3	
CREDIT VALUE	11	

This unit is for team leaders responsible for organising and monitoring the display of goods. Firstly, the unit is about briefing colleagues about display requirements and supervising the assembly of displays. Secondly, the unit is about assessing the effectiveness of displays prepared by colleagues under the learner's supervision. The third aspect of the unit is concerned with keeping stock replenished and accurately priced, and making suggestions for improving displays. The learner does not need specialist visual merchandising skills for this unit.

Additional guidance for this unit: Learner to complete a minimum of 3 displays, at least one to be a window display and at least one to be an in-store display.

Relationship to National Occupational Standards: There is a one-to-one relationship with the following Retail NOS: C.301 (K), C.301 (P), C.302 (K), C.302 (P), C.303 (K), C.303 (P)

Learner Outcomes	Assessment Criteria	For inserting direct evidence or referencing to where the evidence can be found
The Learner will :	The learner can :	
1. Know how to organise staff to display goods for retail sale	1.1 Show that they know how different types of display help the store to reach its sales targets	
	1.2 Show that they know how they can position information so that it helps to promote sales	
	1.3 Show that they know how the layout of the selling area affects sales	
	1.4 Show that they know the legal requirements for pricing goods for sales	

Unit 311

	1.5 Show that they know the company's standards for putting displays together, including standards for cleaning and preparation	
	1.6 Show that they know how to work out what type and quantity of resources they need to set up displays	
	1.7 Show that they know how to brief staff in a way that encourages staff's involvement	
	1.8 Show that they know how to check the work of staff preparing and putting displays together and how to give feedback to staff on staff's performance	
	1.9 Show that they know the security, health and safety requirements and procedures relating to displaying goods	
	1.10 Show that they know the customer's legal rights and the company's legal duties and responsibilities in relation to the display of goods including descriptions of goods	
	1.11 Show that they know how to check that the information in displays is accurate and legal	
	1.12 Show that they know how to use different price marking methods and technologies	
2. Know how to assess how effective displays are in a retail environment	2.1 Show that they know the standards they should apply when assessing how effective displays are	

Unit 311

	2.2	Show that they know how to assess displays against the relevant standards	
	2.3	Show that they know how to identify displays that are unsafe or not secure enough	
	2.4	Show that they know how to correct displays that are unsafe or not secure enough	
	2.5	Show that they know who can authorise changes in the display	
	2.6	Show that they know how to involve staff in assessing and changing displays	
3. Know how to keep products available and maintain product quality in a retail environment	3.1	Show that they know how to collect and record information about prices	
	3.2	Show that they know how to check stock rotation and the quality of goods on display	
	3.3	Show that they know what can happen to stock that is not stored correctly or renewed as needed	
	3.4	Show that they know how to replenish and rotate stock and deal with sub-standard goods	
	3.5	Show that they know how to check pricing and price marking, correct mistakes and change prices	
	3.6	Show that they know why it is important to record price changes accurately	

Unit 311

4. Organise staff to display goods for retail sale	4.1	Confirm the purpose of the display and any relevant requirements and standards and, where necessary, check these with the appropriate authority	
	4.2	Clearly explain to staff the purpose of the display and any relevant requirements and standards	
	4.3	Provide opportunities for staff to check staff understand the requirements and standards of the display	
	4.4	Check that staff prepare the display area and put the display together in a way that causes the least inconvenience to customers	
	4.5	Provide constructive feedback to staff on staff's performance	
	4.6	Check that the assembled display conforms to company requirements and standards	
	4.7	Obtain permission from the appropriate authority to modify or change the display	
	4.8	Monitor that information has been placed accurately and legally, and is chosen and positioned to promote sales effectively	
	4.9	Keep complete, accurate and up to date records of displays	

Unit 311

5. Assess how effective displays are in a retail environment	5.1 Identify what standards the display should meet	
	5.2 Check displays against all the relevant standards to decide how effective displays are	
	5.3 Encourage staff to make helpful comments and identify changes that may make the display more appealing to customers	
	5.4 Ask the right person for permission to make any changes that the learner cannot authorise themselves	
	5.5 Give staff clear instructions and encouragement so that staff can make any changes needed to the display	
	5.6 Take prompt and suitable action to deal with any risks to security or health and safety that the learner's assessment has revealed	
6. Keep products available and maintain product quality in a retail environment	6.1 Collect and record accurate information on price changes	
	6.2 Give accurate, up-to-date price information to the staff who need it	
	6.3 Regularly check price marking and promptly sort out any pricing problems they spot	
	6.4 Make sure that stock replenishment plans are up-to-date and realistic	

Unit 311

	6.5 Deal with out-of-date or deteriorating stock in line with company policy and any relevant laws	
	6.6 Involve staff in spotting potential improvements to the way stock is organised and presented	
	6.7 Spot realistic and effective ways of improving how stock is organised and presented	
	6.8 Get permission from the right person, where necessary, to improve the way stock is organised and presented	
	6.9 Make sure that they maintain customer goodwill and staff morale while stock is being re-organised	

Unit 311

Learner's signature

I confirm that the evidence above is all my own work

..... Date

Assessor's name

..... I confirm that the evidence for this unit is complete and meets the requirements for validity, authenticity and sufficiency.

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Internal verifier's signature (if sampled)

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Unit 312

TITLE	Organise the delivery of reliable customer service	Learner's name
UAN REFERENCE	Y/601/1230	
LEVEL	3	
CREDIT VALUE	6	
<p>This Unit is about how the learner delivers and maintains excellent customer service by being alert to customer reactions and knowing and understanding how the reactions can be used to improve the service. In addition, the learner will need to record customer service information to ensure reliable service</p> <p>Relationship to National Occupational Standards: This Unit directly relates to the Customer Service NOS</p>		

Learner Outcomes	Assessment Criteria	For inserting direct evidence or referencing to where the evidence can be found
The Learner will :	The learner can :	
1. Plan and organise the delivery of reliable customer service	1.1 Plan, prepare and organise everything they need to deliver services or products to different types of customers	
	1.2 Organise what they do to ensure that they are consistently able to give prompt attention to your customers	
	1.3 Reorganise their work to respond to unexpected additional workloads	
2. Review and maintain customer service delivery	2.1 Maintain service delivery during very busy periods and unusually quiet periods	
	2.2 Maintain service delivery when systems, people or resources have let them down	
	2.3 Consistently meet their customers' expectations	

Unit 312

	2.4	Balance the time they take with their customers with the demands of other customers seeking their attention	
	2.5	Respond appropriately to their customers when customers make comments about the products or services they are offering	
	2.6	Alert others to repeated comments made by their customers	
	2.7	Take action to improve the reliability of their service based on customer comments	
	2.8	Monitor the action they have taken to identify improvements in the service they give to their customers	
3. Use recording systems to maintain reliable customer service	3.1	Record and store customer service information accurately following organisational guidelines	
	3.2	Select and retrieve customer service information that is relevant, sufficient and in an appropriate format	
	3.3	Quickly locate information that will help solve a customer's query	
	3.4	Supply accurate customer service information to others using the most appropriate method of communication	
4. Understand how to organise the delivery of reliable customer service	4.1	Describe organisational procedures for unexpected situations and their role within them	

Unit 312

	4.2 Describe resource implications in times of staff sickness and holiday periods and their responsibility at these times	
	4.3 Explain the importance of having reliable and fast information for their customers and their organisation	
	4.4 Evaluate the organisational procedures and systems for delivering customer service	
	4.5 Identify useful customer feedback and explain how to decide which feedback should be acted on	
	4.6 Describe how to communicate feedback from customers to others	
	4.7 Evaluate the organisational procedures and systems for recording, storing, retrieving and supplying customer service information	
	4.8 Explain the legal and regulatory requirements regarding the storage of data	

Unit 312

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Unit 313

TITLE	Promote continuous improvement	Learner's name
UAN REFERENCE	H/601/1554	
LEVEL	3	
CREDIT VALUE	7	
<p>This unit covers the key competence of the customer service professional. The learner must be dedicated to the continuous improvement of customer service and in organising changes in customer service over and over again. The learner will also need to identify potential changes, think through their consequences and make them work.</p> <p>Above all, this unit covers the competence of organising and seeing through change that is sustainable and is in the spirit of continuous improvement in customer service.</p> <p>Relationship to National Occupational Standards: This unit directly relates to the Customer Service NOS</p>		

Learner Outcomes	Assessment Criteria	For inserting direct evidence or referencing to where the evidence can be found
The Learner will :	The learner can :	
1. Plan improvements in customer service based on customer feedback	1.1 Gather feedback from customers that will help to identify opportunities for customer service improvement	
	1.2 Analyse and interpret feedback to identify opportunities for customer service improvements and propose changes	
	1.3 Discuss with others the potential effects of any proposed changes for their customers and their organisation	
	1.4 Negotiate changes in customer service systems and improvements with somebody with sufficient authority to approve trial or full implementation of the change	

Unit 313

2. Implement changes in customer service	2.1 Organise the implementation of authorised changes	
	2.2 Implement the changes following organisational guidelines	
	2.3 Inform people inside and outside their organisation who need to know of the changes being made and the reasons for them	
	2.4 Monitor early reactions to changes and make appropriate fine-tuning adjustments	
3. Review changes to promote continuous improvement	3.1 Collect and record feedback on the effects of changes	
	3.2 Analyse and interpret feedback and share their findings on the effects of changes with others	
	3.3 Summarise the advantages and disadvantages of the changes	
	3.4 Use their analysis and interpretation of changes to identify opportunities for further improvement	
	3.5 Present these opportunities to somebody with sufficient authority to make them happen	
4. Understand how to promote continuous improvement	4.1 Review how service improvements in their area affect the balance between overall customer satisfaction, the costs of providing service and regulatory requirements	

Unit 313

	4.2 Explain how customer experience is influenced by the way service is delivered	
	4.3 Explain how to collect, analyse and present customer feedback	
	4.4 Explain how to make a business case to others to bring about change in the products or services they offer	

Learner's signature

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Unit 314

TITLE	Lead a team to improve customer service	Learner's name
UAN REFERENCE	H/601/1568	
LEVEL	3	
CREDIT VALUE	7	

This unit is all about the learner looking at both their organisation and their staffing resources and bringing these together in a constructive way to improve overall customer service.

Relationship to National Occupational Standards: This unit directly relates to the Customer Service NOS

Learner Outcomes	Assessment Criteria	For inserting direct evidence or referencing to where the evidence can be found
The Learner will :	The learner can :	
1. Plan and organise the work of a team	1.1 Treat team members with respect at all times	
	1.2 Agree with team members their role in delivering effective customer service	
	1.3 Involve team members in planning and organising their customer service work	
	1.4 Allocate work which takes full account of team members' customer service skills and the objectives of the organisation	
	1.5 Motivate team members to work together to raise their customer service performance	
2. Provide support for team members	2.1 Check that team members understand what they have to do to improve their work with customers and why that is important	

Unit 314

	2.2	Check with team members what support they feel they may need throughout this process	
	2.3	Provide team members with support and direction when they need help	
	2.4	Encourage team members to work together to improve customer service	
3. Review performance of team members	3.1	Provide sensitive feedback to team members about their customer service performance	
	3.2	Encourage team members to discuss their customer service performance	
	3.3	Discuss sensitively with team member's action they need to take to continue to improve their customer service performance	
4. Understand how to lead a team to improve customer service	4.1	Describe the roles and responsibilities of their team members and where the team members fit in the overall structure of the organisation	
	4.2	Explain how team and individual performance can affect the achievement of organisational objectives	
	4.3	Explain the implications of failure to improve customer service for their team members and their organisation	
	4.4	Describe how to plan work activities	
	4.5	Explain how to present plans to others to gain understanding and commitment	

Unit 314

	4.6 Explain how to facilitate meetings to encourage frank and open discussion	
	4.7 Explain how to involve and motivate staff to encourage teamwork	
	4.8 Describe how to recognise and deal sensitively with issues of underperformance	

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confirm that the evidence for this unit is complete and meets the requirements for validity, authenticity and sufficiency.

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Unit 315

TITLE	Source required goods and services in a retail environment	Learner's name
UAN REFERENCE	L/500/5205	
LEVEL	3	
CREDIT VALUE	10	
<p>This unit is suitable for the learner if they order stock for a small, independent store and are responsible for choosing the store's suppliers as well as ordering stock directly from suppliers. The unit involves working out what needs replenishing and choosing which suppliers to use. It also involves ordering stock, checking that the right stock is delivered on time, and evaluating supplier's performance.</p> <p>Relationship to National Occupational Standards: There is a one-to-one relationship with the following Retail NOS: B.306 (K), B.306 (P), B.307 (K), B.307 (P)</p>		

Learner Outcomes	Assessment Criteria	For inserting direct evidence or referencing to where the evidence can be found
The Learner will :	The learner can :	
1. Know how to choose suppliers and order stock for retail sale	1.1 Show that they know the types of goods the company normally needs	
	1.2 Show that they know how to use the stock records to find out what needs to be ordered	
	1.3 Show that they know the suppliers currently being used	
	1.4 Show that they know the suppliers who have been used in the past and why these suppliers are no longer being used	
	1.5 Show that they know how to find possible new suppliers and check whether these suppliers are suitable	

Unit 315

	1.6	Show that they know company policy for choosing suppliers	
	1.7	Show that they know what makes a legally binding contract	
	1.8	Show that they know why they need to check suppliers' terms and conditions	
	1.9	Show that they know the company's procedures for placing orders	
	1.10	Show that they know the company's procedures for keeping records of orders	
2. Know how to check and evaluate the performance of suppliers of stock for retail sale	2.1	Show that they know the company's systems and procedures for returning goods	
	2.2	Show that they know the company's legal rights as a buyer	
	2.3	Show that they know the company's policy for paying creditors, and who to consult in the accounts department if a supplier suspends the account	
	2.4	Show that they know the records their company keeps about suppliers' performance and how to find and use these records	
	2.5	Show that they know who in their company can comment on the quality and delivery time of goods or services received, and when and how to ask for those people's comments	

Unit 315

	2.6 Show that they know how to complain to suppliers	
	2.7 Show that they know how to respond positively when colleagues complain about the speed or quality of suppliers' performance	
3. Choose suppliers and order stock for retail sale	3.1 Check the stock records at suitable intervals and spot which stock needs replenishing	
	3.2 Follow a suitable routine for asking if colleagues expect to have any special orders	
	3.3 Compare purchase requisitions to spot items they can order together	
	3.4 Use the purchasing records to find out who the regular suppliers have been, if any	
	3.5 Choose suitable suppliers to use, taking account of stock availability, prices and delivery times	
	3.6 Order items accurately, promptly and from suitable suppliers	
	3.7 Accurately work out the total cost of an order	
	3.8 Keep complete, accurate and up-to-date purchasing records	
	3.9 Store purchasing records so that these can be easily found by the people who need such records	

Unit 315

4. Check and evaluate the performance of suppliers of stock for retail sale	4.1 Promptly match deliveries with orders so they can spot overdue items	
	4.2 Spot items which are overdue and promptly contact the supplier about them	
	4.3 Tell colleagues promptly if orders will not be fulfilled on time and tell colleagues what options are available	
	4.4 Follow procedures for returning goods and getting goods replaced	
	4.5 Check the quality, price and times of deliveries against the company's requirements	
	4.6 Ask colleagues for comments about the quality and delivery times of items received from suppliers	
	4.7 Provide accurate comments to suppliers on the level of service they provide	

Unit 315

Learner's signature

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Assessor's name

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