

FINAL DRAFT

NVQ Information and Library Services Level 2

Candidate logbook

August 2002



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Introduction

This pack contains information and guidance to help you to achieve your National/Scottish Vocational Qualification (N/SVQ). N/SVQs are widely recognised by the employers as the most important vocational qualifications.

Unlike other qualifications, N/SVQs require you to take an active part in your assessment. This Guide and Logbook will help you to plan, collect and organise the evidence you need to gain an N/SVQ.

Good luck!

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What's it all about?

You are about to start a programme of workplace training and assessment leading to a National Vocational Qualification. This candidate guide has been written in order to provide you with information and support as you work through 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.

What is a National/Scottish Vocational Qualification?

National/Scottish Vocational Qualifications (N/SVQs) aim to increase the skills of people, just like you, working in a wide range of industries. Developing the skills of each individual, wherever they work, and whatever they do, fulfils a basic individual need for personal growth. Developing your individual skills also fulfils the needs of your employer in the drive to be competitive and to succeed. It is a vital component for any business wishing for success, competing in domestic and world markets.

N/SVQs have been, and will continue to be, developed for all industries, and are supported by government. They have been designed to provide valid and relevant vocational qualifications for people at work. They are about being competent in your work – being able to do something and understanding why it is done that way. They are written by industry and are known as 'national occupational standards'.

Each N/SVQ is made up of a number of different **units of competence**. Each **unit** describes the standards of a broad area of work that a competent person should be able to perform. There may be a unit summary which describes what the unit is about and clarifies key words and phrases.

Each **unit** is broken down into a number of **elements**. Taken together the elements show what needs to be done to achieve the whole unit.

The elements will include information about

- the standards of performance expected
- the types of evidence which you will need to produce
- there may be range statements which show the depth and breadth of the evidence you are required to produce
- the knowledge required.

There are three types of unit:

Mandatory – you will have to achieve these in order to achieve the qualification overall

Optional – you may be able to choose from a range of optional units depending on where you work in the industry

Additional – these are not a requirement for the award overall, but will be certificated if you achieve them and will show additional areas of competence which you have achieved.

To gain your NVQ certificate you will be expected to show competence in the mandatory units and, when you have successfully completed the relevant units, you will be able to claim your NVQ. The certificate will be awarded by City & Guilds. Even if you only complete some of the units, you will still be able to claim unit certification.

Details about the structure of the qualifications(s), the units etc, will be provided by your centre.

The Level 2 NVQ in Information and Library Services

The Level 2 NVQ in Information and Library Services is a work-based qualification, designed for candidates who are working under supervision on fairly routine tasks eg customer service assistants, information assistants and library assistants.

The units are the responsibility of the Information Services NTO – the National Training Organisation for this sector.

There is a section entitled ‘About this unit’ with each unit which explains what is covered by that unit.

Following this, each **unit** has been broken down into elements.

The **elements** contain:

the **performance criteria** (ie ‘You must be able to...’ references 1, 2, 3 etc)

the related **knowledge and understanding** (references a), b), c) etc)

and the **evidence requirements** (ie the evidence you will need to produce to demonstrate your competence).

Recommended entry to qualification

No specific prior qualifications, learning or experience are required for candidates undertaking the qualification. However, the nature of the learning required for the qualification is such that candidates will need basic literacy and numeracy skills. Candidates will also need to be able to organise written information clearly and coherently.

Centres will need to make an initial assessment of each candidate and decide on the most appropriate level of qualification.

There is also a **Notes** section in each unit which offers clarification of what is expected in terms of evidence or defining terms used in the unit.

The Structure of the NVQ

The Level 2 NVQ in Information and Library Services covers the skills of customer service assistants, information assistants and library assistants. You will be expected to follow instructions and carry out routine tasks efficiently, as well as taking responsibility for your actions. You will need to report accurately to someone with a higher qualification and/or more experience.

The Level 2 NVQ is a **six unit** qualification.

You must achieve all of the mandatory units IL2/1 to IL2/3 (units 201 – 203), plus one of the optional units from **each** option group, IL2/4 to IL2/12 (204 – 212), plus one other in order to achieve the Level 2 NVQ.

Mandatory units IL2/1 to IL2/3 (201 to 203)

		City & Guilds Reference
IL2/1	Maintain the arrangement of material to facilitate retrieval	Unit 201
IL2/1.1	Sort and re-place material	Element 201.1
IL2/1.2	Check the condition and arrangement of material	Element 201.2
IL2/2	Identify and provide information and material required by users	Unit 202
IL2/2.1	Identify users' needs for information and material	Element 202.1
IL2/2.2	Obtain information and material to meet users' needs	Element 202.2
IL2/2.3	Give information and material to users to meet their needs	Element 202.3
IL2/2.4	Maintain positive working relationships with users	Element 202.4
IL2/3	Solve problems for customers (CSLB Unit 4 Level 2)	Unit 203
IL2/3.1	Gather information on customer problems	Element 203.1
IL2/3.2	Propose solutions for customers	Element 203.2
IL2/3.3	Take action to deliver solutions	Element 203.3

Optional units – you must achieve one of these units from each Option group:

Option Group 1 – User services

IL2/4	Direct users	Unit 204
IL2/4.1	Provide and maintain written directions to the location and use of facilities	Element 204.1
IL2/4.2	Provide verbal directions to the location and use of facilities	Element 204.2
IL2/5	Issue and recover loan material	Unit 205
IL2/5.1	Identify users' eligibility for loan material	Element 205.1
IL2/5.2	Make and progress reservations	Element 205.2
IL2/5.3	Lend material	Element 205.3
IL2/5.4	Recall material	Element 205.4
IL2/5.5	Recover loan material	Element 205.5
IL2/6	Enable the use of information technology (ITNTO 201)	Unit 206
IL2/6.1	Prepare for the use of information technology	Element 206.1
IL2/6.2	Follow procedures when using information technology	Element 206.2
IL2/6.3	Conclude the use of information technology	Element 206.3
IL2/7	Provide and maintain information for clients (CAMPAG A10)	Unit 207
IL2/7.1	Provide information to clients	Element 207.1
IL2/7.2	Maintain information for providing to clients	Element 207.2
IL2/8	Process payments for purchases (DNTO 2/19)	Unit 208
IL2/8.1	Calculate the price of customers' purchases	Element 208.1
IL2/8.2	Process sales payments	Element 208.2

Option Group 2 – Activities

IL2/9 Process and secure information and material

IL2/9.1 Mark and protect material

IL2/9.2 Assess material for cleaning and repair

IL2/9.3 Operate and monitor systems to secure information and material

IL2/9.4 Monitor user's treatment of material

Unit 209

Element 209.1

Element 209.2

Element 209.3

Element 209.4

IL2/10 Contribute to the maintenance of a supportive environment for users **Unit 210**

IL2/10.1 Monitor the appearance of facilities and the physical environment

Element 210.1

IL2/10.2 Assist in minimising disruption to users

Element 210.2

IL2/10.3 Collect and action comments from users

Element 210.3

IL2/11 Display stock to specification to attract customer interest and promote sales (DNTO 2/1) **Unit 211**

IL2/11.1 Plan to set up displays to specification

Element 211.1

IL2/11.2 Set up, maintain and dismantle display areas

Element 211.2

IL2/11.3 Label displays of stock

Element 211.3

IL2/12 Produce documents using word processing software (ITNTO 202) **Unit 212**

IL2/12.1 Retrieve and enter data to create and update files

Element 212.1

IL2/12.2 Produce the required documents by manipulating data

Element 212.2

IL2/12.3 Output the document to the required destination

Element 212.3

Who will be involved in my NVQ?

Assessment for your NVQ is carried out at your centre which has been approved by City & Guilds. Your centre may be your place of work, a college, training agency or a combination of these.

The people involved in your assessment are as follows:

The candidate

That's you! You are the most important person of all because without you, NVQs would not exist. Your responsibilities as a candidate are 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.

We will also explain what is meant by assessment 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 is most likely to be your immediate supervisor or manager
- will themselves have achieved or be working towards an NVQ qualification to allow them to act as an assessor
- will help you plan and organise your evidence
- is responsible for making the decision about your evidence and judging when you are competent

The internal verifier

- is responsible for maintaining the quality of assessment within the centre by checking and validating assessment decisions made by assessors.
- will have experience in your area of work and must be technically competent
- will themselves have achieved or be working towards an NVQ qualification to allow them to act as an internal verifier. In some circumstances the internal verifier might also be an assessor.

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* assessor who is familiar with the standards
- 2 D32*/D33* 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, eg 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

*** Replacement 'D' Units**

The Assessor and Verifier units have been revised. The new units are:

- Unit A1 – Assess candidates using a range of methods
- Unit A2 – Assess candidates' performance through observation
- Unit V1 – Conduct internal quality assurance of the assessment process
- Unit V2 – Conduct external quality assurance of the assessment process

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 NVQ. **Only the approved assessor is qualified to judge your evidence.** The job of the expert witness is to report to the assessor their observations of your performance.

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 you work, the witness will need to write a short statement describing what you actually did. The witness should be aware of performance criteria for the activity and the evidence requirements which are explained in the standards.

One person may witness many pieces of evidence and on each occasion, the witness must sign and date the Witness Statement Form. You must ensure that each witness is recorded, with a signature in the Witness Status List.

A Witness Statement Form and a Witness Status List have been included for you to photocopy and use in the section of this guide *Documents provided for inclusion in your portfolio*.

Only the approved assessor is qualified to judge the candidate's evidence. The job of the expert witness is to report to the assessor their observations of the candidate's performance.

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 performance criteria for each unit of the NVQ. 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. For

each unit of the NVQ the evidence requirements are clearly stated and support the performance criteria. Achieving your NVQ requires you to provide sufficient evidence which shows that you can work to the National Occupational Standards contained within the qualification.

Most assessment for your NVQ will be carried out by your assessor observing you at work and by questioning you about what you are doing. There are four basic sources of evidence and you may collect evidence from all of them:

Performance at work

All candidates must, for the purposes of assessment, be working in the Library environment either as employees or in a voluntary capacity (where candidates are students in HE or FE the education provider must arrange with sector employees assessment situations for students). This principle will apply to all units, or aspects of units, except those for which simulation has been deemed acceptable (see *Simulation* paragraph in this section and unit descriptors in the National Occupational Standards).

Observation in the workplace is an essential source of evidence. Your assessor will watch you working and assess your performance against the National Occupational Standards. Assessment guidance and examples of evidence have been provided for each element in the standards. Evidence may also be provided by witness statements, work records, job sheets, or a diary of your work. Although evidence can be provided by witnesses, no unit of your NVQ can be signed off as complete without the involvement of a qualified assessor.

Performance of specially set tasks

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

Questioning

Questioning may be oral or written, 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 national standard. Answers to questions will be recorded in your portfolio.

Historical evidence

You may have done things in the past which are applicable to your NVQ. These may be used as evidence, provided that they are sufficiently current and relevant to the NVQ standard, eg 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.

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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 – but guidance on this follows. First we need to concentrate on what are the potential sources and what is acceptable as evidence.

Background evidence

A copy of your CV, a copy of your previous or current job description, any previous certificates which relate to this award.

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 elements for any of the units of the NVQ, then your assessor can readily observe you to judge your competence, particularly if the assessor is your supervisor or line manager. 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.

Often there are products from the assessed activity which should be retained 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, eg line managers
- Staff appraisals
- References received
- Witness Statements from clients

Supplementary evidence

Where it is not possible to gain sufficient performance evidence through direct observation of your work activities or products of this work, 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 an interview
- complete written tests
- provide a written personal account of competence to support other evidence.

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What is a portfolio?

Most candidates working to achieve an NVQ find that the simplest way to collect their evidence is in a loose-leaf lever arch file or binder.

This is called a **Portfolio of Evidence**.

A portfolio can be any shape or size, depending on the type of evidence you want to put forward for assessment. However, it is usual to use an A4 ring binder or lever arch folder.

Your portfolio will need to be a well organised, structured collection of all the evidence you have collected, gathered together and referenced to the National Occupational Standards. In order to achieve this, it is recommended that dividers are used between each unit and the evidence you have collected, so that the portfolio is easy to work through.

You are required to present your evidence quite simply to show – what you can do, and – what you know. It should be presented to demonstrate how it matches the performance criteria, the evidence and the underpinning knowledge requirements.

You will discover that one piece of work might provide evidence for more than one element or unit. It must be correctly cross referenced using the evidence summary forms provided.

Types of evidence to be filed in your portfolio will include:

- assessment action plans
- records of assessment
- assessor reports
- witness statements
- a record of products from your work
- reports from your manager or supervisor
- details of questions you have been asked
- historical evidence (APL)

Your assessor will regularly inspect your portfolio, providing support and guidance as appropriate. As you begin to collect evidence you must index it using the evidence summary, with cross references to the National Occupational Standards. Your assessor will show you how to do this because it will identify what you must do to complete the unit.

At the beginning of the section *Documents provided for inclusion in your portfolio* is a list of the order of all the information to be filed in your portfolio. The list also makes reference to the documents we have produced for you to photocopy for use in your portfolio. You will find copies of the documents in the section in this guide.

You must produce your portfolio when requested for inspection by the internal verifier, and the external verifier will also need to inspect your portfolio during a visit.

Only assessors and internal verifiers can confirm that you have completed a unit and completed your record of achievement.

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
- handbooks describing eg how the company computer system works
- technical information about specific products from manufacturers' product catalogues.

The Assessment Process

Planning

Step 1

Your assessor will discuss with you which units you are going to start first. To help you decide this, in the section of the guide entitled getting started, you will find a self assessment process to work through. When you have completed the self assessment you will have an overall action plan of what you have to do to achieve the NVQ. This you will file in your portfolio along with your personal details.

Step 2

Having decided where to start, you will need to thoroughly read through the unit and the elements in question.

Step 3

You and your assessor will discuss any historical evidence you may have.

Step 4

Looking at the evidence requirements, you and your assessor will work out

- how much can be assessed in your workplace
- how much evidence will need to be gathered through specially set tasks
- how your knowledge will be assessed, by oral questions, etc.

This is your **assessment action plan** which you will need to file in your portfolio (Form C&G IL7).

Evidence

Step 5

You will produce evidence by

- being observed performing tasks in line with the standards, a number of times
- being questioned by your assessor during and after observations
- presenting projects and assignments, answering written questions, where necessary.
- keeping documents, such as work logs, job cards, checklists, letters, etc.

Feedback

Step 6

After each assessment:

- if your performance has not been completely successful you will receive further training and more experience which will be recorded
- if your performance is successful it will be recorded.

An **assessment report** will be completed by your assessor identifying any further action to be taken. This will be filed in your portfolio with the records of the assessment (Form C&G IL8).

You will be given **feedback** by your assessor which will be recorded and filed in your portfolio as you might need to take further action agreed with your assessor (Form C&G IL9).

Step 7

With reference to the agreed assessment and action plans, you will regularly discuss your performance and progress with your assessor.

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Common questions and answers

Are there any entry requirements for NVQs?

No, the level you take will depend on your skills and knowledge.

Do I have to be on a training course to enter for an NVQ?

Not necessarily. If you already have the necessary skills and knowledge you can be assessed without further training. However, you need to register with an approved City & Guilds centre where the assessment can be arranged. In practice, employers and colleges approved as centres, offering assessment for NVQs do provide training to satisfy the requirements of the underpinning knowledge and understanding.

How long does an NVQ take to complete?

There is no set time limit in which you must complete your NVQ. However, standards which make up the qualification are normally revised every five years and you should aim to complete your qualification before then. For the Level 2 in Information & Library Services, it is expected that you should be able to complete your qualification within 12 to 18 months of registration.

What happens if I change jobs or go to another assessment centre?

You will be able to continue your NVQ provided you move to another approved centre.

Do I have to do all of the units in the NVQ to get a certificate?

Once you have completed all the necessary units for an NVQ, and they have been confirmed by your internal verifier, your centre will apply to City & Guilds for a certificate. You will also be issued with a Certificate of Unit Credit which will list all the units which you have achieved.

If you are not aiming for a full NVQ, your centre can apply for a Certificate of Unit Credit, listing those units which you have achieved.

Please direct any questions about your certificate to staff at your centre.

What do I do if I am not happy with an assessment decision?

If an occasion occurs when you do not agree with a decisions made by your assessor, you should follow the centre's appeals procedure. Any unresolved problems should be referred to City & Guilds.

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Getting started

We know that candidates starting an NVQ are already very busy people, because of the work they do. The advice which follows is intended to help you to achieve the award whilst carrying out your role and responsibilities at work.

One practical way to begin is to compare each unit of competence from the National Occupational Standards to your current job role. This will give you one or more units where you can begin to identify evidence and perhaps a list in which you feel you will need training or practice.

A more detailed way to start is to go through the self analysis questions which follow. They have been designed to help you to identify the units in which you are

- competent
- partially competent
- not at all competent or have not yet had the opportunity to perform.

Using the following questions, consider each unit. This activity will also help you to become familiar with the content of each unit so that you can look for economies in time when planning your evidence. Some evidence may be valid for more than one unit.

Candidate Self Assessment

Taking each unit of competence separately, work through the following questions and make notes on your training needs and assessment opportunities. In the *Documents provided for inclusion in your portfolio section*, a form (Form C&G IL5) is included to help you to summarise and produce an action plan.

- a)** Is this a part of your current job role and one in which you consider yourself competent?
If your answer is **Yes** – Discuss assessment opportunities with your assessor/mentor
If **No** – move on to question **b**
- b)** Did this ever form part of your job role, with this or any other organisation?
If so, do you still consider yourself competent?
If your answer is **Yes** – Discuss assessment opportunities with your assessor
If **No** – move on to question **c**
- c)** Does this form part of your current job role, but in an area in which you are not yet competent?
If your answer is **Yes** – Discuss training needs with appropriate person
If **No** – move on to question **d**
- d)** Discuss training needs, assessment opportunities with your assessor and identify what action you need to take and agree a date for completion.

Planning your progress

A planned approach will ensure the most economical use of your time and efforts.

Your Personal Action Plan

Now you have completed the self analysis exercise, you and your assessor should be in a position to agree which unit or units you will start working on. You will now be able to plan the collection of evidence for the elements which make up each unit.

As you begin to plan, do remember that evidence for one element from a unit can often be used for other elements from other units.

Each element will require more than one type of evidence.

Evidence must cover all **the performance criteria**, the **evidence requirements** and **the knowledge and understanding** for each element.

Planning will save time.

When you fill in your assessment action plan identifying what kind of evidence you could provide, ask yourself the following questions

- can my **performance** be **observed** by the assessor?
- in the absence of the assessor, can a **witness authenticate** my evidence? eg line manager
- can I bring forward any evidence or **previous achievement**?
- can I include any **records, documents**, etc.?
- are there any **requirements** where I cannot easily produce evidence?
- is reoccurring evidence work based?

Refer back to the section in this guide about the assessment process and discuss your proposals with your assessor and agree your action plan. A document has been provided for this activity reference C&G IL7.

Over to you!

It's up to you now because it's your qualification that you are working towards.

We hope you enjoy collecting and organising the evidence for your portfolio and that you develop your skills by having a wider experience.

Remember:

- Getting started is usually the most difficult step in the whole process
- Once you have started however, the process of evidence collection becomes easier as you become used to it
- Remember to plan carefully using evidence for more than one element wherever possible
- Keep up the momentum, don't get side tracked by other events.
- Complete work on time, don't get behind with your schedule and action plan
- Ask your assessor for support and guidance when you need it
- Finally – on the next page you will find a Quick Candidate Checklist just to keep you on the right track. Good luck – and remember to enjoy achieving your NVQ!

Quick Candidate Checklist

- Check the content of the mandatory and optional units depending on where you work in the industry
- Complete your Self Analysis.
- Agree with your assessor where you will begin to collect evidence. Focus initially on those units for which you have readily available evidence.
- Identify the evidence you have collected and agree dates for assessment with your assessor. Agree dates for observed assessment. This is your assessment plan.
- Collect evidence and complete the evidence summary sheet.
- Submit the evidence to your assessor for initial assessment.
- Agree when you should give your portfolio to your assessor.
- The assessor will complete an assessment report for each element and return the portfolio to you.
- The assessment report will indicate
 - a) whether the evidence is sufficient in quality and quantity to meet the standard
 - b) if the performance criteria have been met
 - c) if the evidence meets the requirements for knowledge and understanding
 - d) that the requirements for performance evidence have been met
 - e) what additional evidence, if any, you need to provide
 - f) on which areas an interview to review progress will focus.
- If the evidence produced in the portfolio and at the interview clearly demonstrate your competence, then your assessor will 'sign off' the element(s) or unit(s) as complete.
- The cycle will then begin again until you have all the units completed that you intended to achieve.

Your assessor will suggest that you initially submit your portfolio when you have completed one or more elements so that you receive guidance and feedback at an early stage. After that the pace and pattern you establish with your assessor will be negotiated to suit you both.

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Documents provided for inclusion in your portfolio

A well constructed Portfolio should include all the information required to demonstrate candidate competence, assembled and organised in the following order.

These documents have been included for you to photocopy and use in your portfolio.

A blank Evidence Summary sheet is included in this document – you will need to copy it in order to use it to record your evidence.

Refer to the section in this guide, *What is a Portfolio?* for further guidance.

Introduction		Documents
	Candidate and Centre Details	C & G / IL1
	Contact Details	C & G / IL2
	Candidate Resume/CV	
	Candidate Job Description/Workplace Location/Current Duties	
	Witness Status List with Signatures	C & G / IL3
	Summary of Achievements	C & G / IL4
	Summary of self assessment activity and personal action plan	C & G / IL5
For All Units		
	The Performance Criteria for the Elements in each Unit.	In this guide
Presenting Evidence		
	An Evidence Summary for you to link the evidence presented to the Performance Criteria, Evidence & Knowledge Requirements. <i>You will need to copy the sheet in this Guide to record your evidence for each element.</i>	C & G / IL6
Assessment Information		
	Assessment Action Plans	C & G / IL7
	Records of Assessment (Signed and Dated)	
	Assessment Report	C & G / IL8
	Evidence of Feedback provided and further Action Plans	C & G / IL9
Performance Evidence		
	Product Evidence (Retain for inspection by Assessor/IV)	
	Candidate Job Sheet (Signed and Dated with reference to product)	C & G / IL10
	Expert Witness Statement (Signed and Dated)	C & G / IL11
	Candidate Statement of Activity (Witnessed, Signed and Dated)	C & G / IL12
Knowledge		
	Candidate Statement of Activity (Witnessed, Signed and Dated)	C & G / IL12
	Records of Assessor questions and your answers	C & G / IL13

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Candidate and Centre Details

Scheme Number

Candidate Name

Candidate Number

Centre Name

Centre Number

Centre Co-ordinator

Centre Address

.....

.....

Centre Telephone Number Fax

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Contact details

Centre Co-ordinator

Name

Centre number

Address

.....

Tel no Fax no

Email

Assessor details

1 Assessors name

Position

Assessing which unit/s

Where to contact

2 Assessors name

Position

Assessing which unit/s

Where to contact

Internal verifier details

Internal Verifiers name

Position

Where to contact

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Witness status list

Form C&G IL3

Candidate name Level

Name and contact address of witness	Witness status	Professional relationship to candidate	Elements witnessed	Witness signature	Date

Include all witnesses who have signed candidate evidence or written a report. Ensure that the witness signs the details as correct.

Assessor signature Date

Witness status categories

- 1 Occupational expert and qualified Assessor
- 2 Qualified Assessor without occupational experience
- 3 Occupational expert familiar with standards
- 4 Occupational expert not familiar with standards
- 5 Non expert not familiar with the standards

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Summary of achievements – Level 2

Form C&G IL4

Candidate name Centre

Unit	Title	Date achieved	Assessor's signature	Candidate signature
	Mandatory units			
201	Maintain the arrangement of material to facilitate retrieval			
202	Identify and provide information and material required by users			
203	Solve problems for customers (CLSB Unit 4 Level 2)			
	Optional units (candidate must achieve three units)			
	Any additional unit(s) achieved			

Confirmation of achievement of units for which certification is requested

Signature of internal verifier Date

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Summary of Self Assessment activity and Personal Action Plan

Form C&G IL5

Candidate Date completed

Unit	Competent in current job	Competent in previous job	Evidence easy to obtain ✓	Not competent training needed	Action Required	By When
Mandatory units						
Maintain the arrangement of material to facilitate retrieval						
Identify and provide information and material required by users						
Solve problems for customers (CLSB Unit 4 Level 2)						
Optional units						
Any additional unit(s) achieved						

What you should do next:

Having completed the Self Assessment, you should now have a list of units where you can start to identify and collect the evidence. You may also have a list of units where you feel you are not competent and need training and experience. This document should be included in your portfolio and discussed with your assessor. Using the document provided in this Candidate Guide, entitled Assessment Action Plans (Form C&G IL7) you will need to make detailed plans for progress with your assessor.

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Evidence Summary

Form C&G IL6

Level Unit No and Title

Element No and Title

Candidate

Evidence description	Portfolio Reference	Performance Criteria (eg 1 to 5)	Knowledge and Understanding reference	Performance evidence reference

You will need to copy this sheet to record your evidence for each element

This page may be photocopied as required

Evidence description	Portfolio Reference	Performance Criteria (eg 1 to 5)	Knowledge and Understanding reference	Performance evidence reference

Assessment action plan

Form C&G IL7

Candidate	
Level	
Assessor	
Unit	
Element	
Venue	
Date/Time	

Evidence assessed by:

Direct observation		Projects and assignments	
Oral questioning		Simulation	
Witness testimony		Portfolio evidence	
Candidate statement		Supplementary evidence	
Written questions		Accredited prior achievement	
Work products			

Action plan / Evidence requirements:

Feedback arrangements:

Assessor name

Assessor signature Date

Candidate signature Date

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Assessment report**Form C&G IL8**

Level Candidate

Assessor

Unit Element

	Yes or No	Is more performance evidence required?	Is more knowledge evidence required?	Is more portfolio evidence required?
Have all the performance criteria been met?				
Have the knowledge and understanding requirements been met?				
Is the portfolio evidence valid, sufficient, current and authentic?				
Has the evidence been properly authenticated?				

Assessor comments:

Assessor questions	Candidate answers
--------------------	-------------------

Outcome of the assessment

Assessor signature Date

Candidate signature Date

Action Plan and Feedback to Candidate

Form C&G IL9

Level Candidate

Assessor

Date

Unit Element

Feedback to candidate:

Action to be taken by candidate:

Assessor signature Date

Candidate signature Date

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Candidate job sheet

Form C&G IL10

Level Candidate

Assessor/expert witness

Date

Unit Element

Details of the task:

Materials involved:

Equipment used:

Reference to performance criteria, knowledge and evidence requirements:

PC's

Knowledge:

Evidence:

Assessor/expert witness signature Date

Candidate signature Date

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Expert Witness statement**Form C&G IL11**

Candidate	
Level	
Unit	
Element	
Venue	
Date and time	

Candidate statement

Description of activity to be assessed by the witness

Witness statement

Give a description of, and authenticate, the activity undertaken by the candidate and confirm the extent to which you consider the candidate to be competent.

Witness statement (continued...)

Give a description of, and authenticate, the activity undertaken by the candidate and confirm the extent to which you consider the candidate to be competent.

Witness details:

Name

Position/Job title

Relationship to candidate

Contact details

Candidate signature Date

Witness signature Date

Candidate statement of activities

Form C&G IL12

Level Candidate

Date	Activity	Unit/ element	Performance criteria	Knowledge and understanding	Evidence requirements

Date	Activity	Unit/ element	Performance criteria	Knowledge and understanding	Evidence requirements

Record of assessor questions

Form C&G IL13

Level Candidate

Question	Candidate answer	Unit/Element reference

Question	Candidate answer	Unit/Element reference

Assessor name

Assessor signature Date

Candidate signature Date

Key skills signposting

Key Skills Signposting Summary Relationship Table

Unit No and Title	Communication	Application of Number	Information Technology	Working with others	Improving own learning and performance	Problem Solving
IL2/1 Maintain the arrangement of material to facilitate retrieval	C2.3	N1.1	-	-	-	PS2.1
IL2/2 Identify and provide information and material required by users	C2.3	N1.2	-	-	-	PS2.1 PS2.2 PS2.3
IL2/3 Solve problems for customers (CSLB Unit 4 Level 2)	C1.3 C2.2	-	-	WO1.2 WO1.3 WO2.1	-	PS2.1 PS2.2 PS2.3
IL2/4 Direct users	C2.3	-	IT2.3	-	-	-
IL2/5 Issue and recover loan material	C2.3	N1.2	-	-	-	-
IL2/6 Enable the use of information technology (ITNTO 201)	C2.3	-	IT2.1	-	-	PS2.1 PS2.2 PS2.3
IL2/7 Provide and maintain information for clients (CAMPAG A10)	C2.3	-	IT1.2 IT2.1	WO2.1 WO2.2	-	-
IL2/8 Process payments for purchases (DNTO 19 Level 2)	C2.3	N1.2	-	-	-	-

Unit No and Title	Communication	Application of Number	Information Technology	Working with others	Improving own learning and performance	Problem Solving
II2/9 Process and secure information and material	C1.2 C1.3 C2.1a C2.1b	-	-	WO2.2 WO2.3	-	PS2.1 PS2.2 PS2.3
II2/10 Contribute to the maintenance of a supportive environment for users	C2.3	N1.2 N1.3	-	WO2.2 WO2.3		PS2.1 PS2.2 PS2.3
II2/11 Display stock to specification to attract customer interest and promote sales (DNTO 1 Level 2)	C1.3 C2.1b	N1.2 N1.3	-	-	-	-
II2/12 Produce documents using word processing software (ITNTO 202)	-	-	IT1.2 IT2.1	-	-	PS2.1 PS2.2 PS2.3

Appeals and equal opportunities

If an occasion should arise when a candidate is not satisfied with the assessor's judgement of his/her competence during the assessment process, or a candidate feels that the opportunity for assessment is being denied, the Internal Verifier and Centre Co-ordinator should address the problem. If, however, the problem cannot be resolved, the External Verifier may be approached to offer independent advice. In unresolved cases, the External Verifier may refer this back to City & Guilds. All appeals must be clearly documented by the Centre Co-ordinator 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 City & Guilds Quality Standards department.

Access to the NVQ framework is open to all, irrespective of gender, race, creed, age or special needs and there are no formal entry requirements. The Centre Co-ordinator should ensure that no candidate is subjected to unfair discrimination on any grounds in relation to access to assessment and to the fairness of the assessment. QCA requires City & Guilds to monitor centres to check whether equal opportunities policies are being adhered to.

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The National Occupational Standards – Level 2 NVQ in Information & Library Services

as supplied by the Information Services NTO

Mandatory units – you must achieve all of these units

	City & Guilds Reference
IL2/1 Maintain the arrangement of material to facilitate retrieval	Unit 201
IL2/1.1 Sort and re-place material	Element 201.1
IL2/1.2 Check the condition and arrangement of material	Element 201.2
IL2/2 Identify and provide information and material required by users	Unit 202
IL2/2.1 Identify users' needs for information and material	Element 202.1
IL2/2.2 Obtain information and material to meet users' needs	Element 202.2
IL2/2.3 Give information and material to users to meet their needs	Element 202.3
IL2/2.4 Maintain positive working relationships with users	Element 202.4
IL2/3 Solve problems for customers (CSLB Unit 4 Level 2)	Unit 203
IL2/3.1 Gather information on customer problems	Element 203.1
IL2/3.2 Propose solutions for customers	Element 203.2
IL2/3.3 Take action to deliver solutions	Element 203.3

Optional units – you must achieve one of these units from each Option group plus one other unit.

Option Group 1 – User services

IL2/4 Direct users	Unit 204
IL2/4.1 Provide and maintain written directions to the location and use of facilities	Element 204.1
IL2/4.2 Provide verbal directions to the location and use of facilities	Element 204.2
IL2/5 Issue and recover loan material	Unit 205
IL2/5.1 Identify users' eligibility for loan material	Element 205.1
IL2/5.2 Make and progress reservations	Element 205.2
IL2/5.3 Lend material	Element 205.3
IL2/5.4 Recall material	Element 205.4
IL2/5.5 Recover loan material	Element 205.5
IL2/6 Enable the use of Information Technology (ITNTO 201)	Unit 206
IL2/6.1 Prepare for the use of Information Technology	Element 206.1
IL2/6.2 Follow procedures when using Information Technology	Element 206.2
IL2/6.3 Conclude the use of Information Technology	Element 206.3
IL2/7 Provide and maintain information for clients (CAMPAG A10)	Unit 207
IL2/7.1 Provide information to clients	Element 207.1
IL2/7.2 Maintain information for providing to clients	Element 207.2
IL2/8 Process payments for purchases (DNTO 2/19)	Unit 208
IL2/8.1 Calculate the price of customers' purchases	Element 208.1
IL2/8.2 Process sales payments	Element 208.2

Option Group 2 – Activities

IL2/9 Process and secure information and material	Unit 209
IL2/9.1 Mark and protect material	Element 209.1
IL2/9.2 Assess material for cleaning and repair	Element 209.2
IL2/9.3 Operate and monitor systems to secure information and material	Element 209.3
IL2/9.4 Monitor user's treatment of material	Element 209.4

IL2/10	Contribute to the maintenance of a supportive environment for users	Unit 210
IL2/10.1	Monitor the appearance of facilities and the physical environment	Element 210.1
IL2/10.2	Assist in minimising disruption to users	Element 210.2
IL2/10.3	Collect and action comments from users	Element 210.3
IL2/11	Display stock to specification to attract customer interest and promote sales (DNTO 2/1)	Unit 211
IL2/11.1	Plan to set up displays to specification	Element 211.1
IL2/11.2	Set up, maintain and dismantle display areas	Element 211.2
IL2/11.3	Label displays of stock	Element 211.3
IL2/12	Produce documents using word processing software (ITNTO 202)	Unit 212
IL2/12.1	Retrieve and enter data to create and update files	Element 212.1
IL2/12.2	Produce the required documents by manipulating data	Element 212.2
IL2/12.3	Output the document to the required destination	Element 212.3

Unit IL2/1 Maintain the arrangement of material to facilitate retrieval

Element 2/1.1 Sort and re-place material

Element 2/1.2 Check the condition and arrangement of material

About this unit

All candidates for the Level 2 NVQ/SVQ in Information and Library Services must achieve this unit.

You

- sort and re-place different types of material, such as books, audio tape or film, in the correct locations
- re-place material in the correct sequence
- work safely
- deal effectively with any difficulties that occur when re-placing material
- check the condition of material regularly
- deal with any cases of missing or mis-placed material
- keep records of what is missing and what has been withdrawn

Key words

Certain Key Words are listed and defined at the end of this Unit. You should use these definitions to clarify the meaning of these terms in the outcomes. The Key Words are:

criteria; material; re-place

Your evidence for this unit may contribute towards evidence for achievement of the following Key and Core Skills.

Core skills

Problem Solving (Planning and Organising) Intermediate 1: Plan, organise and complete a straightforward task

Written Communication (Reading) Intermediate 1: Read, understand and evaluate written communication

Key skills

Communication: 2.3 Write two different types of documents about straightforward subjects

Application of Number: 1.1 Interpret straightforward information from two different sources

Problem Solving: 2.1 Identify a problem and come up with two options for solving it

Unit key words

Criteria Principles or standards by which you judge whether a record is suitable for withdrawal.

Material The items that your library keeps and makes available to users, such as books, periodicals, audio and video tapes, CDs, or toys.

Re-place To place materials in their correct position in the library system.

Unit IL2/1 Maintain the arrangement of material to facilitate retrieval

Element IL2/1.1

Sort and re-place material

You show that you can

- 1 sort and re-place material accurately and with minimum disruption to users
- 2 re-place material tidily and in its correct place
- 3 handle and position material safely
- 4 note and correct promptly any errors in sequencing the material
- 5 get appropriate assistance to resolve difficulties you have in re-placing material

You understand

Why

- K1 it is important to sort and re-place material accurately
- K2 it is important to handle and position material safely
- K3 errors can occur when you re-place material

How

- K4 re-placing material can disrupt users
- K5 parallel and broken sequences affect re-placing material

What

- K6 your organisation's systems are for arranging material
- K7 kinds of difficulty you might face when re-placing material

Who

- K8 can give you assistance when you have difficulties re-placing material

Unit IL2/1 Maintain the arrangement of material to facilitate retrieval

Element IL2/1.1

Sort and re-place material

Performance Evidence

You must produce evidence from your work that you can sort and re-place material on two occasions.

You show, in your performance, that:

- R1 you can sequence material either by classification or by subject grouping, and
- R2 you can re-place at least one of the following types of material:
 - printed material, such as books and journals
 - recorded material, such as audio tapes, videos or CDs
 - filmed material, such as microfiches or filmed images
- R3 ... in the following types of storage:
 - open storage, such as shelves or racks
 - closed storage, such as drawers, cupboards or cabinets

Collecting the Evidence

- 1 If your performance evidence does not cover both types of sequencing (R1), all types of material (R2) and storage (R3), you must show your assessor that you understand these aspects of the outcome. You can do this by using one of the following:
 - answering questions put to you by your assessor
 - showing how you have dealt with these aspects in the last two years

You should discuss this when planning your assessment with your assessor.

- 1 You are expected to be able to deal with errors in sequencing or difficulties in re-placing material. If your performance evidence does not cover these, you can produce the evidence from sources such as:
 - notes which you have kept, describing how you dealt with such incidents at work
 - answers to 'What if...?' questions put by your assessor
- 2 The difficulties you might meet when re-placing material include:
 - lack of space
 - inappropriate space and storage
 - the size and/or weight of the material
 - the different types of storage facilities available
- 3 The assistance you may need, when meeting any of these difficulties, includes:
 - help to lift and position material
 - advice on where to store material
 - advice or instruction on whether to re-arrange a section, in order to re-place material
- 4 When you plan assessment, look for opportunities to collect evidence for this outcome at the same time that you collect evidence for other outcomes, including IL2/1.2.

Unit IL2/1 Maintain the arrangement of material to facilitate retrieval

Element IL2/1.2

Check the condition and arrangement of material

You show that you can

- 1 check regularly that the material is in a fit condition, and meets your organisation's criteria and priorities for retention
- 2 check regularly that groups of material are correctly arranged
- 3 accurately identify missing material
- 4 correct errors in re-placement promptly
- 5 record details of missing and withdrawn items accurately and clearly

You understand

Why

- K1 it is important to check the condition and arrangement of material regularly, and what would happen, if regular checks were not made
- K2 errors in re-placement should be corrected promptly
- K3 records of missing and withdrawn items are needed

How

- K4 to identify whether material is missing

What

- K5 to look for, when checking the condition of material
- K6 typical errors in re-placement can occur, including:
- over-loading
 - wrong location of material (such as books out of order, or a video in the wrong storage box)
- K7 your organisation's system is for arranging material
- K8 your organisation's criteria and priorities are for retaining and withdrawing material
- K9 records to keep

Unit IL2/1 Maintain the arrangement of material to facilitate retrieval

Element IL2/1.2

Check the condition and arrangement of material

Performance Evidence

To achieve the outcome, you produce evidence from your work that you can check the condition and arrangement of material on two occasions, each of which will be observed by your assessor.

You show, in your performance, that

- R1 you check the condition and arrangement of at least two of the following types of material:
- printed material, such as book and journals
 - recorded material, such as audio tapes, videos or CDs
 - filmed material, such as microfiches or filmed images
- R2 ... and at least one of the following types of groups of material:
- periodicals
 - multi-volume sets
 - sets of audio, video or CD material

Collecting the Evidence

- 1 If your performance evidence does not cover all types of material (R1) and groups (R2), you must show your assessor that you understand these aspects of the outcome. You can do this by using one of the following:
- witness testimony from your manager
 - answering questions put to you by your assessor
 - showing how you have dealt with these aspects on (recent) earlier occasions

You should discuss this when planning your assessment with your assessor.

- 1 You are expected to be able to identify missing material and correct re-placement errors. These situations may not arise when your assessor observes you. If this is the case, you can produce evidence from other sources, such as:
- notes which you have kept, describing how you dealt with such incidents at work
 - witness testimony from your manager
 - answers to 'What if...?' questions put by your assessor
- 2 The conditions you check include:
- damage
 - parts missing
 - wear and tear
 - cleanliness
- 3 When you plan assessment, look for opportunities to collect evidence for this outcome at the same time that you collect evidence for other outcomes, including IL2/1.1.

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Unit IL2/2 Identify and provide information and material required by users

Element IL2/2.1	Identify users' needs for information and material
Element IL2/2.2	Obtain information and material to meet users' needs
Element IL2/2.3	Give information and material to users to meet their needs
Element IL2/2.4	Maintain positive working relationship with users

About this unit

All candidates for the Level 2 NVQ/SVQ in Information and Library Services must achieve this unit.

You

- find out what the users require
- cope with competing demands for service
- check the availability of the information or material the user wants
- find out where the information or material is located
- refer requests to others when you cannot deal with them, and obtain what is required from other sources when you do not have it
- check that material is fit for use and is what the user wants
- advise users when it is not possible to meet their requests
- give information to users and collect any payments due
- treat users courteously and helpfully, and maintain good working relationships with them.

Key words

Certain Key Words are listed and defined at the end of this Unit. You should use these definitions to clarify the meaning of these terms in the outcomes. The Key Words are:

appropriate questioning; hostile or inappropriate behaviour

Your evidence for this unit may contribute towards evidence for achievement of the following Key and Core Skills

Core skills

Oral Communication Intermediate 2: Produce and respond to oral communication

Using Information Technology Intermediate 1: Using an IT system effectively to perform a range of straightforward tasks

Working With Others Intermediate 1: Work with others in a group to complete a straightforward task

Written Communication (Reading) Intermediate 2: Read, understand and evaluate written communication

Written Communication (Writing) Intermediate 2: Produce well-structured written communication

(continued)

Unit IL2/2 Identify and provide information and material required by users

Key skills

- Communication:* 2.3 Write two different types of documents about straightforward subjects
- Application of Number:* 1.2 Carry out straightforward calculations to do with: amounts and sizes, scales and proportion, handling statistics
- Problem Solving:* 2.1 Identify a problem and come up with two options for solving it
- 2.2 Plan and try out at least one option for solving the problem, obtaining support and making changes to your plan when needed
- 2.3 Check if the problem has been solved by applying given methods, describe results and explain your approach to problem solving

Unit keywords

- Appropriate questioning* Questions may be closed (requiring a ‘Yes’ or ‘No’ response), or open, requiring a response in which the user gives you information. *Do you require material relating to the twentieth century?* is a closed question. *Which century do you want material for?* is an open question. Questions can be factual (*Which primary sources do you need?*), or probing (*Have you looked for this material before?*) or evaluative (*What do you consider most reliable sources?*) and so on. In this unit, it is important to select the type(s) of questions most likely to help you identify users’ requirements fully and efficiently.
- Hostile or inappropriate behaviour* Behaviour which threatens the security of people or materials, or which is disruptive, or a threat to health and safety, or which is likely to adversely affect users and the environment in which you and users are working.

Unit IL2/2 Identify and provide information and material required by users

Element IL2/2.1

Identify users' needs for information and material

You show that you can

- 1 communicate courteously and clearly with users
- 2 identify each user's requirements accurately, through appropriate questioning and listening carefully
- 3 confirm with the user that you understand what they require
- 4 adapt your own behaviour to what you perceive to be the user's needs and feelings
- 5 deal tactfully and helpfully with competing demands for service from other would-be users, in an order consistent with your organisation's procedures and guidelines
- 6 promptly refer any requests for information or material to an appropriate person, when you are unable to meet the user's requirements

You understand

Why

- K1 it is important to communicate courteously and clearly with users
- K2 it is important to respond sensitively to what you see as the user's needs and feelings
- K3 you should confirm with users what their requirements are

How

- K4 to select and use questions and questioning techniques to identify users' requirements
- K5 to adapt your behaviour to users' needs and feelings
- K6 to deal with competing demands

What

- K7 the range of responses and feelings from customers is likely to be
- K8 the typical areas of interest your users have
- K9 your organisation's policies and limitations are for meeting users' needs
- K10 kinds of requests for information or material lie outside your own ability or responsibility to meet

Who

- K11 the user groups served by your organisation are
- K12 to refer requests to, when you cannot deal with them

Unit IL2/2 Identify and provide information and material required by users

Element IL2/2.1

Identify users' needs for information and material

Performance Evidence

You must produce evidence from your work that you can identify users' needs on two occasions. Your assessor will observe you on at least one occasion.

You show, in your performance, that you achieve the outcome

- R1 when communicating with users in at least two of the following ways:
- face-to-face
 - by telephone
 - in writing

Collecting the Evidence

- 1 If your performance evidence does not cover all types of communication (R1), you must show your assessor that you communicate in all these ways. You can do this by using one of the following:
- witness testimony from your manager
 - showing how you have dealt with these aspects on (recent) earlier occasions
 - completing a task or assignment set by your assessor

You should discuss this when planning your assessment with your assessor.

- 1 You are expected to be able to deal with competing demands (criterion 5) and requests that you are unable to meet (criterion 6). If these situations do not arise when your assessor observes you, you can produce the evidence from sources such as:
- notes which you have kept, describing how you dealt with such incidents at work
 - witness testimony from your manager or colleagues
 - answers to 'What if...?' questions put by your assessor

You should take this into account when planning assessment with your assessor, and look for opportunities when your assessor can observe you dealing with situations like these. For example, you may be able to say when it is likely that you will be dealing with competing demands during busy periods in a normal working day or week.

- 1 Some examples of requests you may have to refer to someone else are:
- a request for information or material that is not in your library or information unit
 - a request for information or material that you are not authorised to release
 - a request for specialised information or material that is beyond your own area of expertise
 - a request for a quantity of material that is more than your organisation normally allows a user or type of user
- 2 When you plan assessment, look for occasions when you can be observed achieving this outcome at the same time that you are observed achieving other outcomes in this Unit.

Unit IL2/2 Identify and provide information and material required by users

Element IL2/2.2

Obtain information and material to meet users' needs

You show that you can

- 1 select appropriate information sources to search for the information and material requested
- 2 search for the information or material required systematically and efficiently
- 3 conduct your search as quickly as possible, given the nature of the request and the way information sources are organised
- 4 explain clearly, if you are unable to find exactly what the user has requested, and politely advise the user on an appropriate course of action
- 5 locate the information and material accurately
- 6 give the user clear directions to the location, if users are allowed to access it themselves
- 7 promptly and clearly request the information and material from an appropriate person, when you or the user cannot access it

You understand

Why

K1 searches should be conducted systematically and quickly

How

K2 to search for information and material

K3 to locate information and material within your organisation's system

What

K4 sources of information to use

K5 procedures to use to search for and locate information and material. For example:

- card systems
- computer searches
- location plans and guides

K6 your organisation's policy is for directly accessing information and material

K7 typical alternatives are available to users, when the information and material they need is not available – such as photocopies, microfiches, material on a similar topic, referrals to other sources

K8 types of information and material you may need to request from others

Who

K9 can provide information and material, when you cannot, such as other users or other providers

Unit IL2/2 Identify and provide information and material required by users

Element IL2/2.2

Obtain information and material to meet users' needs

Performance Evidence

You must produce evidence from your work that you can obtain information and material to meet users' needs on two occasions, each of which will be observed by your assessor.

You show, in your performance, that

- R1 you can use both the following types of information source:
- your own organisation's catalogues
 - external providers of information
- R2 ... to search for and locate at least two of the following types of information and material:
- sound
 - writing
 - printed text
 - pictures and graphics
 - electronically stored information and material
- R3 ... when the information and material is at least one of the following:
- in an open access location
 - in a restricted access location
 - accessible only by referral to another person or organisation

Collecting the Evidence

- 1 If your performance evidence does not cover all types of information and material (R2) and locations (R3), you must show your assessor that you understand these aspects of the outcome. You can do this by using one of the following:
- witness testimony from your manager
 - answering questions put to you by your assessor
 - showing how you have dealt with these aspects on (recent) earlier occasions
 - completing an assignment set by your assessor

You should discuss this when planning your assessment with your assessor.

- 1 You are expected to be able to explain when information and material is not available (criterion 4), give the user directions (criterion 6), and get information and material from other people (criterion 7). These situations may not arise when your assessor observes you. If this is the case, you can produce evidence from other sources, such as:
- notes which you have kept, describing how you dealt with such incidents at work
 - witness testimony from your manager
 - answers to 'What if...?' questions put by your assessor
- 2 When you plan assessment, look for occasions when you can be observed achieving this outcome at the same time that you are observed achieving other outcomes in this Unit.

Unit IL2/2 Identify and provide information and material required by users

Element IL2/2.3

Give information and material to users to meet their needs

You show that you can

- 1 confirm that the information and material is fit for use, and is what the user needs
- 2 assemble information and material quickly and accurately for the user, when this is necessary
- 3 give the information and material to the user promptly
- 4 record the issue of information and material accurately, using the approved procedures
- 5 calculate correctly, and obtain promptly, any payment due from the user

You understand

Why

K1 you should check the condition of material

K2 you should check that information and material meets the user's needs

How

K3 to assemble information and material for users, including:

- photocopying
- extracting information and material from a retained source
- collating
- packaging

K4 to record the issue of information and material

What

K5 the user's needs are

K6 your organisation's policy is, for lending and providing information and material

Unit IL2/2 Identify and provide information and material required by users

Element IL2/2.3

Give information and material to users to meet their needs

Performance Evidence

You must produce evidence from your work that you can give information and material to users to meet their needs on two occasions, each of which will be observed by your assessor.

You show, in your performance, that

R1 you can provide at least two of the following types of information and material:

- sound
- writing
- printed text
- pictures and graphics
- electronically stored information and material

R2 ... when dealing with the user in at least one of the following ways:

- face-to-face
- over the telephone
- in writing

Collecting the Evidence

1 If your performance evidence does not cover all types of information and material (R1) and channels of communication (R2), you must show your assessor that you understand these aspects of the outcome. You can do this by using one of the following:

- witness testimony from your manager
- answering questions put to you by your assessor
- showing how you have dealt with these aspects on (recent) earlier occasions

You should discuss this when planning your assessment with your assessor.

1 You are expected to calculate and obtain payments (criterion 5). This situation may not arise when your assessor observes you. If this is the case, you can produce evidence from other sources, such as:

- notes which you have kept, describing how you dealt with such incidents at work
- witness testimony from your manager
- a task set by your assessor

2 When you plan assessment, look for occasions when you can be observed achieving this outcome at the same time that you are observed achieving other outcomes in this Unit.

Unit IL2/2 Identify and provide information and material required by users

Element IL2/2.4

Maintain positive working relationships with users

You show that you can

- 1 treat all users courteously and helpfully at all times
- 2 maintain the standard of appearance and behaviour expected of you in your work
- 3 confirm that users understand the arrangements in place to protect their health and safety, and the security of their property and that of the organisation
- 4 explain clearly and politely to users what services you can and cannot provide
- 5 deal with hostile or inappropriate user behaviour in ways that minimise disruption to other users and protect the organisation
- 6 minimise any conflict between users' needs and organisational limitations

You understand

Why

K1 it is important to maintain positive working relationships with users

How

K2 to confirm that users understand health, safety and security arrangements

K3 to deal with hostility, inappropriate user behaviour and conflicts between user needs and organisational limitations

What

K4 the user's needs are

K5 the local health, safety and security arrangements are

K6 your organisation's services are and their limitations

K7 your organisation's policy is for dealing with hostile or inappropriate behaviour

K8 the standards of appearance and behaviour are for your organisation

Unit IL2/2 Identify and provide information and material required by users

Element IL2/2.4

Maintain positive working relationships with users

Performance Evidence

You must produce evidence from your work that you can maintain positive working relationships with users, each of which will be observed by your assessor.

You show, in your performance, that

- R1 you can communicate with users:
- face-to-face
 - over the telephone
 - in writing

Collecting the Evidence

1 If your performance evidence does not cover all channels of communication (R1), you must show your assessor that you understand these aspects of the outcome. You can do this by using one of the following:

- witness testimony from your manager or colleagues
- answering questions put to you by your assessor
- showing how you have dealt with these aspects on (recent) earlier occasions

You should discuss this when planning your assessment with your assessor.

1 You are expected to deal with hostile or inappropriate behaviour (criterion 5) and conflicts between what the user needs and what your organisation can provide (criterion 6) . These situations may not arise when your assessor observes you. If this is the case, you can produce evidence from other sources, such as:

- notes which you have kept, describing how you dealt with such incidents at work
- witness testimony from your manager or colleagues
- answers to questions put by your assessor

2 When you plan assessment, look for occasions when you can be observed achieving this outcome at the same time that you are observed achieving other outcomes in this Unit.

Unit IL2/3 Solve problems for customers (CSLB Unit 4 Level 2)

Element IL2/3.1	Gather information on customer problems
Element IL2/3.2	Propose solutions for customers
Element IL2/3.3	Take action to deliver solutions

About this unit

All candidates for the Level 2 NVQ/SVQ in Information and Library Services must achieve this unit

You

- find out what problems customers perceive they have
- seek assistance from colleagues for solutions to customer problems
- examine current organisational procedures for solutions to customer problems
- propose other products and services to solve customer problems
- check service delivery and pass problems arising to the appropriate authority
- implement solutions to customer problems in co-operation with others

Key words

Certain Key Words are listed and defined at the end of this Unit. You should use these definitions to clarify the meaning of these terms

customer, products and services

Your evidence for this unit may contribute towards evidence for achievement of the following Key and Core Skills

Core skills

Oral Communication Intermediate 2: Produce and respond to oral communication

Problem Solving (Critical Thinking) Intermediate 2: Analyse a situation or issue

Problem Solving (Planning and Organising) Intermediate 2: Plan, organise and complete a task

Working With Others Intermediate 2: Work with others in a group to analyse, plan and complete an activity

Written Communication (Reading) Intermediate 2: Read, understand and evaluate written communication

Written Communication (Writing) Intermediate 2: Produce well-structured written communication

Key skills

Communication: 2.2 Read and summarise information from two extended documents about a straightforward subject

Communication: 2.3. Write two different types of document about straightforward subjects

Problem Solving: 2.1 Identify a problem and come up with two options for solving it

Problem Solving: 2.2 Plan and try out at least one option for solving the problem, obtaining support and making changes to your plan when needed

(continued)

Unit IL2/3 Solve problems for customers (CSLB Unit 4 Level 2)

Problem Solving: 2.3 Check if the problem has been solved by applying given methods, describe results and explain your approach to problem solving

Working with Others: 2.1 Plan straightforward work with others, identifying objectives and clarifying responsibilities and confirm working arrangements
2.2 Work cooperatively with others towards achieving identified objectives, organising tasks to meet your responsibilities
2.3 Exchange information on progress and agree ways of improving work with others to help achieve objectives

Unit Keywords

Customer In this Unit, a customer is a user of your organisation's services.

Products and services In this unit, 'products' means information and material required by users. 'Services' means the information and library services provided by your organisation.

Unit IL2/3 Solve problems for customers (CSLB Unit 4 Level 2)

Element IL2/3.1

Gather information on customer problems

You show that you can

- 1 accurately identify and sensitively acknowledge customers' perceptions of problems
- 2 clearly summarise customers' problems, using information gained from them
- 3 consult colleagues for information relating to problems affecting customers
- 4 record recurring problems or complaints, and pass the information to those who are in a position to provide solutions to them

You understand

How

- K1 to choose the best method of collecting and summarising information
- K2 to present customer perceptions of problems in an unbiased manner
- K3 to gather information effectively from colleagues

What

- K4 information there is on relevant products or services relating to customer problems
- K5 relevant legislation applies to customer problems
- K6 communication techniques relating to customer problems to use
- K7 techniques to use for recording information on customer problems

Unit IL2/3 Solve problems for customers (CSLB Unit 4 Level 2)

Element IL2/3.1

Gather information on customer problems

Performance Evidence

You must produce evidence from your work that you can gather information on customer problems on two occasions. Your assessor will observe you on each occasion.

You show, in your performance, that you achieve the outcome

- R1 when dealing with at least two of the following types of problem affecting customers:
- availability of products or services
 - quality of products or services
 - use of products or services
 - organisation systems and procedures
 - individual personnel
- R2 when gathering information from two of the following sources:
- originating inside the organisation
 - originating outside the organisation
 - routinely generated
 - non-routinely generated
- R3 when gathering information about both:
- single service problems – that is, those which are ‘one-off’ and do not recur
 - problems of a recurring nature

Collecting the evidence

- 1 If your performance evidence does not cover all types of problems (R1), and all sources of information (R2), you must show your assessor that you achieve the outcome for these aspects. You can do this by using one of the following:
- witness testimony from your manager
 - showing how you have dealt with these aspects on (recent) earlier occasions
 - completing a task or assignment set by your assessor
 - answering questions put to you by your assessor

You should discuss this when planning your assessment with your assessor.

- 1 You are expected to be able to consult with colleagues (criterion 3). If this situation does not arise when your assessor observes you, you can produce the evidence from sources such as:
- notes which you have kept, describing how you dealt with such incidents at work
 - witness testimony from your manager
 - answers to ‘What if...?’ questions put by your assessor
- 2 ‘Problems’ may be, for example, not being able to read documents, not having time for research, not being able to visit the office, not understanding how to use the equipment.
- 3 When you plan assessment, look for occasions when you can be observed achieving this outcome at the same time that you are observed achieving other outcomes in this Unit.

Unit IL2/3 Solve problems for customers (CSLB Unit 4 Level 2)

Element IL2/3.2

Propose solutions for customers

You show that you can

- 1 seek assistance from colleagues for solutions to customer problems
- 2 examine current organisational procedures for solutions to customer problems
- 3 propose other products and services to solve customer problems
- 4 confirm that customers understand proposals, and the reasons for them

You understand

How

- K1 to work in differing ways with colleagues to provide solutions to customer problems
- K2 to use product or service knowledge to propose solutions to customer problems
- K3 to effectively use your own and others' knowledge and experience to propose solutions acceptable to the customer

What

- K4 relevant product or service knowledge is available
- K5 relevant legislation applies to service problems
- K6 organisational procedures relate to service problems
- K7 communication techniques to use

Unit IL2/3 Solve problems for customers (CSLB Unit 4 Level 2)

Element IL2/3.2

Propose solutions for customers

Performance Evidence

You must produce evidence from your work that you can propose solutions for customers on two occasions, each of which will be observed by your assessor.

You show, in your performance, that

- R1 you seek assistance from both of the following types of colleague:
- managers
 - other staff within the organisation
- R2 ... to deal with at least two types of problem affecting customers:
- availability of products or services
 - quality of products or services
 - use of products or services
 - organisation systems and procedures
 - individual personnel
- R3 you examine organisational procedures which are:
- formal
 - informal

Collecting the Evidence

- 1 If your performance evidence does not cover all types of problem (R2) and both types of organisational procedure (R3), you must show your assessor that you can deal with this range of problems and procedures. You can do this by using one of the following:
- witness testimony from your manager
 - answering questions put to you by your assessor
 - showing how you have dealt with these aspects on (recent) earlier occasions
 - completing an assignment set by your assessor

You should discuss this when planning your assessment with your assessor.

- 2 When you plan assessment, look for occasions when you can be observed achieving this outcome at the same time that you are observed achieving other outcomes in this Unit.

Unit IL2/3 Solve problems for customers (CSLB Unit 4 Level 2)

Element IL2/3.3

Take action to deliver solutions

You show that you can

- 1 promptly activate standard procedures to deliver solutions to customer problems
- 2 check service delivery and pass problems arising to the appropriate authority
- 3 implement solutions to customer problems in co-operation with others
- 4 take action, within your own area of authority, to prevent shortfalls in the delivery of products or services
- 5 take action to alert colleagues to potential shortfalls in the delivery of products or services

You understand

How

- K1 to use formal and informal procedures to solve problems for customers
- K2 to influence others to deliver solutions to customer problems
- K3 to check service is being delivered effectively

What

- K4 the organisation procedures designed to solve customer problems are
- K5 information about relevant products or services relates to customer problems
- K6 communication techniques relate to solving customer problems
- K7 your organisation's checking systems are in relation to solving customer service problems
- K8 ways of checking service is being delivered effectively to users

Unit IL2/3 Solve problems for customers (CSLB Unit 4 Level 2)

Element IL2/3.3

Take action to deliver solutions

Performance Evidence

You must produce evidence from your work that you take action to deliver solutions on two occasions, each of which will be observed by your assessor.

You show, in your performance, that

R1 you use the following checking methods:

- formal
- informal

R2 you take action to prevent the following shortfalls:

- personal
- originating elsewhere

R3 you alert the following colleagues:

- managers
- other staff

Collecting the Evidence

- 1 When you plan assessment, look for occasions when you can be observed achieving this outcome at the same time that you are observed achieving other outcomes in this Unit.

National Occupational Standards - Optional Units

Group 1: User Services

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Unit IL2/4 Direct users

Element IL2/4.1	Provide and maintain written directions to the location and use of facilities
Element IL2/4.2	Provide verbal directions to the location and use of facilities
<p><i>About this unit</i></p> <p>This unit is for you if, as part of your job, you help users by giving them directions to the facilities they need, and you maintain written directions for users. It is a unit in Option Group 1 – User Services – in the Information and Library Services Level 2 NVQ/SVQ.</p> <p>You</p> <ul style="list-style-type: none"> • check written directions for users to make sure that they are effective • keep directions clean and tidy • identify improvements to written directions • give users verbal directions to the use of facilities, including the use of equipment • make sure you appear welcoming to users <p><i>Key words</i></p> <p>Certain Key Words are listed and defined at the end of this Unit. You should use these definitions to clarify the meaning of these terms in the outcomes. The Key Words are:</p> <p style="text-align: center;">facilities; language</p> <p>Your evidence for this unit may contribute towards evidence for achievement of the following Key and Core Skills</p> <p><i>Core skills</i></p> <p><i>Oral Communication Intermediate 2:</i> Produce and respond to oral communication</p> <p><i>Using Information Technology Intermediate 1:</i> Using an IT system effectively to perform a range of straightforward tasks</p> <p><i>Written Communication (Reading) Intermediate 2:</i> Read, understand and evaluate written communication</p> <p><i>Written Communication (Writing) Intermediate 2:</i> Produce well-structured written communication</p> <p><i>Key skills</i></p> <p><i>Communication:</i> 2.3 Write two different types of document about straightforward subjects</p> <p><i>Information Technology:</i> 2.3 Present combined information for two different purposes</p> <p><i>Unit Keywords</i></p> <p><i>Facilities</i> The buildings, equipment and services available to users</p> <p><i>Language</i> Depending on the context in which you work, this may mean the following: 1 The way directions are expressed, so that people will understand them. 2 The use of languages other than the language of the community in which you are working.</p>	

Unit IL2/4 Direct users

Element IL2/4.1

Provide and maintain written directions to the location and use of facilities

You show that you can

- 1 place directions to optimise their helpfulness and visibility
- 2 check that the language and formats of directions are appropriate for users
- 3 confirm that directions are accurate and consistent with each other
- 4 take corrective action when you find that directions are inaccurate, out of date or inconsistent
- 5 keep directions clean and tidy
- 6 identify accurately, and take promptly, opportunities to improve written directions, in order to support users

You understand

Why

- K1 different users need different kinds of language in written directions, or different kinds of signs
- K2 it is important to maintain written directions for users
- K3 it is important to check the appropriateness, accuracy and consistency of directions

How

- K4 to confirm the appropriateness, accuracy and consistency of directions
- K5 to identify opportunities to improve written directions

What

- K6 your organisation's policy is on providing written directions for users
- K7 information people are likely to look for in written directions
- K8 the general subject areas are in which your organisation holds information
- K9 special features the buildings have which need to be taken into account in written directions
- K10 the procedure is for generating signs and other written directions

Unit IL2/4 Direct users

Element IL2/4.1

Provide and maintain written directions to the location and use of facilities

Performance Evidence

You must produce evidence from your work that you can provide and maintain written directions to the location and use of facilities on two occasions, each of which will be observed by your assessor.

You show, in your performance, that

- R1 you provide and maintain at least two of the following types of written directions:
- signs and labels
 - diagrams, such as maps or layout plans
 - guides, such as shelf guides or guides to the catalogue and classification system
 - instructions on the use of equipment
- R2 ... which direct users to at least two of the following:
- information
 - material
 - copying facilities
 - reading equipment
- R3 you check the appropriateness of at least one of the following types of format:
- text
 - pictures and graphics
 - writing conventions other than the one the organisation normally employs (such as different alphabets, Braille or symbols)

Collecting the Evidence

- 1 If your performance evidence does not cover all types of written directions (R1), all types of services and facilities for users (R2) and all types of format, you must show your assessor that you understand these aspects of the outcome. You can do this by using one of the following:

- showing how you have dealt with these aspects on (recent) earlier occasions
- completing a task set by your assessor

You should discuss this when planning your assessment with your assessor.

- 2 You are expected to take corrective action when needed (criterion 4) . This situation may not arise when your assessor observes you. If this is the case, you can produce evidence from other sources, such as:

- notes which you have kept, describing how you dealt with such incidents at work
- answers to questions put by your assessor

Unit IL2/4 Direct users

Element IL2/4.1

Provide and maintain written directions to the location and use of facilities

So, you show that you...

- 1 identify users' needs for assistance sensitively, quickly and accurately
- 2 provide appropriate advice courteously and promptly
- 3 present yourself in a way which is welcoming and appropriate to each user
- 4 explain clearly and accurately how to operate equipment available to users
- 5 obtain further relevant assistance for users, when required

You understand

How

K1 to operate equipment which is available to users

What

K2 facilities are available for users

K3 special needs for guidance users may have

K4 further assistance users may require

L5 kinds of user are served by your organisation

Unit IL2/4 Direct users

Element IL2/4.1

Provide and maintain written directions to the location and use of facilities

Performance Evidence

You must produce evidence from your work that you provide verbal directions to the location and use of facilities on two occasions, each of which will be observed by your assessor.

You show, in your performance, that

- R1 you provide verbal directions to both individuals and groups
- R2 you provide verbal directions on at least one of the following occasions:
 - during quiet periods
 - during busy periods
- R3 ... in at least one of the following circumstances:
 - while dealing with enquiries
 - while dealing with other duties
- R4 you give verbal directions in relation to using at least one of the following facilities:
 - information
 - materials
 - photocopying
 - reading equipment

Collecting the Evidence

- 1 If your performance evidence does not cover all types of occasion (R2), circumstances (R3) and facilities (R4), you must show your assessor that you understand these aspects of the outcome. You can do this by using one of the following:
 - notes kept by yourself of other times when you have provided verbal directions
 - showing how you have dealt with these aspects on (recent) earlier occasions
 - answering questions put to you by your assessor

You should discuss this when planning your assessment with your assessor.

- 1 You are expected to seek further assistance when the user requires it (criterion 5). This situation may not arise when your assessor observes you. If this is the case, you can produce evidence from other sources, such as:
 - notes which you have kept, describing how you dealt with such incidents at work
 - answers to 'What if...?' questions put by your assessor

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Unit IL2/5 Issue and recover loan material

Element IL2/5.1	Identify users' eligibility for loan material
Element IL2/5.2	Make and progress reservations
Element IL2/5.3	Lend material
Element IL2/5.4	Recall material
Element IL2/5.5	Recover loan material

About this unit

This unit is for you, if, as part of your job, you issue and recover material on loan. It is a unit in Option Group 1 – User Services – of the Information and Library Services Level 2 NVQ/SVQ.

You

- find out whether the user is eligible for the service they require
- take action to record new users, or to vary access privileges
- make reservations for users
- progress reservations and notify users when the information or material they want is available
- identify when material has to be recalled
- notify users that they should return material
- deal with cases when material is not returned
- process returned material

Key words

Certain Key Words are listed and defined at the end of this Unit. You should use these definitions to clarify the meaning of these terms in the outcomes. The Key Words are:

appropriate questioning; special access; verify

Your evidence for this unit may contribute towards evidence for achievement of the following Key and Core Skills

Core skills

Oral Communication Intermediate 1: Produce and respond to straightforward oral communication

Using Information Technology Intermediate 2: Using an IT system effectively and responsibly to process a range of information

Working With Others Intermediate 2: Work with others in a group to analyse, plan and complete an activity

Written Communication (Reading) Intermediate 1: Read, understand and evaluate straightforward written communication

Written Communication (Writing) Intermediate 1: Produce simple but detailed written communication

(continued)

Unit IL2/5 Issue and recover loan material

Key skills

Communication: 2.3 Write two different types of document about straightforward subjects

Application of Number: 1.2 Carry out straightforward calculations to do with: amounts and sizes, scales and proportion, handling statistics

Unit Keywords

Appropriate questioning Questions may be closed (requiring a ‘Yes’ or ‘No’ response), or open, requiring a response in which the user gives you information. Do you require material relating to the twentieth century? is a closed question. Which century do you want material for? is an open question. Questions can be factual (Which primary sources do you need?), or probing (Have you looked for this material before?) or evaluative (What do you consider most reliable sources?) and so on. In this unit, it is important to select the type(s) of questions most likely to help you identify users’ requirements fully and efficiently.

Special access Arrangements made for people who cannot access material in the usual way.

Verify To check that something is true, by careful investigation.

Unit IL2/5 Issue and recover loan material

Element IL2/5.1

Identify users' eligibility for loan material

You show that you can

- 1 clarify and confirm the services which the user requires, by using appropriate questions sensitively
- 2 identify accurately the user's eligibility and priority for service
- 3 identify accurately whether the user has special needs and priorities
- 4 quickly create an accurate user record for eligible new users
- 5 quickly and correctly action procedures to authorise new users, arrange special access or extend access, when the user is eligible for any of these services
- 6 explain accurately and politely when the user is ineligible for the services requested
- 7 treat users courteously and helpfully at all times

You understand

Why

- K1 different users require different services
- K2 it is important to confirm users' eligibility and priority for services
- K3 it is important to create accurate user records

How

- K4 to deal appropriately with different users
- K5 to create user records

What

- K6 your organisation's policy and eligibility criteria are for use of its services
- K7 the special access facilities are
- K8 your organisation's priorities for service are, and when they may be varied
- K9 procedures to use to authorise new users, create user records, arrange special access and extend access
- K10 Data Protection issues are involved

Unit IL2/5 Issue and recover loan material

Element IL2/5.1

Identify users' eligibility for loan material

Performance Evidence

You must produce evidence from your work that you can identify users' eligibility for loan material on two occasions, each of which will be observed by your assessor.

You show, in your performance, that

R1 you can identify users' eligibility in at least two of the following ways:

- face-to-face
- by telephone
- in writing

R2 you can deal with at least one of the following types of user:

- those authorised to have full access
- those authorised to have restricted access
- those unauthorised, but eligible for membership
- those unauthorised and ineligible for membership

R3 you can deal with users with special needs arising from at least one of the following:

- mobility
- age
- language
- literacy
- distance from the service

Collecting the Evidence

1 If your performance evidence does not cover all of R1, R2 and R3, you must show your assessor that you understand these aspects of the outcome. You can do this by using one of the following:

- showing how you have dealt with these aspects on (recent) earlier occasions
- answering questions put to you by your assessor
- witness testimony from your manager

You should discuss this when planning your assessment with your assessor.

2 You are expected to implement special access procedures (criterion 5) and cases of ineligibility (criterion 6). These situations may not arise when your assessor observes you. If this is the case, you can produce evidence from other sources, such as:

- notes which you have kept, describing how you dealt with such incidents at work
- answers to questions put by your assessor

Unit IL2/5 Issue and recover loan material

Element IL2/5.2

Make and progress reservations

You show that you can

- 1 verify and record accurately details of the material and the user
- 2 explain clearly the reservation arrangements
- 3 estimate realistically the time when the reservation should be fulfilled
- 4 tell the user clearly how long it will take to fulfil the reservation
- 5 identify accurately the date after which material will be of no value to user
- 6 review progress in providing the reserved material sufficiently to identify any problems or delays
- 7 act promptly to deal with any delays or difficulties in fulfilling the reservation
- 8 notify users promptly when reserved material becomes available

You understand

Why

- K1 it is important to estimate and explain fulfilment times
- K2 it is important to monitor fulfilment of reservations

How

- K3 the reservation system connects with the rest of the issue and recall system
- K4 to deal with uncollected reserved material

What

- K5 identification number systems apply to different sorts of material
- K6 details of material to record, such as the title, author, date, format, identification number
- K7 user details to record, such as name, status, contact information, whether any items are overdue, any charges outstanding
- K8 the typical fulfilment times are for different types of material

Unit IL2/5 Issue and recover loan material

Element IL2/5.2

Make and progress reservations

Performance Evidence

You must produce evidence from your work that you make and progress reservations on two occasions, each of which will be observed by your assessor.

You show, in your performance, that

- R1 you reserve at least one of the following types of material
- material in stock but currently unavailable
 - material from other providers
- R2 you explain at least one of the following reservation arrangements:
- for payment
 - for notification
 - for collection

Collecting the Evidence

- 1 If your performance evidence does not cover all types of material (R1), and arrangements (R2), you must show your assessor that you understand these aspects of the outcome. You can do this by using one of the following:
- showing how you have dealt with these aspects on (recent) earlier occasions
 - answering questions put to you by your assessor

You should discuss this when planning your assessment with your assessor.

Unit IL2/5 Issue and recover loan material

Element IL2/5.3

Lend material

You show that you can

- 1 politely and accurately confirm the identity of the user and their eligibility to borrow the material
- 2 accurately record in the system all the details of loan
- 3 check that the material is in a fit condition for lending
- 4 explain clearly to the user if the material is not in a fit condition, and take the action authorised to deal with the material
- 5 check accurately whether any pre-conditions or conditions apply to the loan, explain them clearly and enforce them fully
- 6 mark the material with the correct date for return
- 7 give an accurate receipt for the material, if it is inappropriate to mark it with a return date
- 8 de-activate fully any security devices

You understand

Why

- K1 the identity and eligibility of the user, and the condition of the material, and any pre-conditions or conditions affecting the loan should be checked

How

- K2 to deal with damaged material

- K3 to de-activate security devices

What

- K4 information to look for to confirm the user's identity and eligibility

- K5 your organisation's policy, eligibility criteria and priorities are for lending to different types of user

- K6 lending periods and types of loan your organisation offers

- K7 copyright restrictions apply to the material

- K8 what pre-conditions and conditions might apply to loans, including:

- payment of outstanding fees or fines
- payment of loan charges for the material
- changes in identification details
- restrictions on the use of material
- reporting the loan to senior staff

Who

- K9 the types and groups of users served by your organisation are

Unit IL2/5 Issue and recover loan material

Element IL2/5.3

Lend material

Performance Evidence

You must produce evidence from your work that you lend material on two occasions, each of which will be observed by your assessor.

You show, in your performance, that

R1 you identify the user by means of at least one of the following:

- the user's ticket
- membership card
- specific authorisation

R2 you lend at least two of the following types of material:

- books
- journals
- audio material
- video material
- CD ROMs
- pictures

R3 you record the details in either a manual or an electronic system

Collecting the Evidence

1 If your performance evidence does not cover all of R1, R2 and R3, you must show your assessor that you understand these aspects of the outcome. You can do this by using one of the following:

- showing how you have dealt with these aspects on (recent) earlier occasions
- witness testimony from your manager
- answering questions put to you by your assessor
- a task set by your assessor

You should discuss this when planning your assessment with your assessor.

2 You are expected to deal with material unfit for lending (criterion 4) and loan pre-conditions or conditions (criterion 5). These situations may not arise when your assessor observes you.

If this is the case, you can produce evidence from other sources, such as:

- notes which you have kept, describing how you dealt with such incidents at work
- witness testimony from your manager
- answers to 'What if...?' questions put by your assessor

3 Criterion 6 refers to marking a return date on material. This includes stamping material.

Unit IL2/5 Issue and recover loan material

Element IL2/5.4

Recall material

You show that you can

- 1 identify and note accurately all the relevant details of material for recall
- 2 identify promptly and verify accurately the need to recall material
- 3 retrieve the user's details accurately from the system
- 4 promptly notify the user to return the material on the specified number of occasions
- 5 take the action authorised to recover material, when it is not returned
- 6 record accurately what you do to recall material, when you do it

You understand

Why

K1 material may need to be recalled, including recalls needed before return dates

How

K2 to retrieve user details from the system

K3 the recall system connects with the rest of the issue and reservation system

K4 to deal with non-returns

What

K5 user details you require, including:

- name
- eligibility and access privileges
- contact details

K6 your organisation's policy and priorities are for recalling material

K7 system your organisation uses for storing user information

K8 your organisation's procedures are for dealing with non-returns, including:

- sending standard letters
- imposing fines
- restricting or removing access privileges

K9 competing demands there may be for material

Unit IL2/5 Issue and recover loan material

Element IL2/5.4

Recall material

Performance Evidence

You must produce evidence from your work that you recall material on two occasions, each of which will be observed by your assessor.

You show, in your performance, that

R1 you recall material to meet at least one of the following needs:

- demand from another user
- expiry of the loan period
- change in the user's eligibility

R2 you retrieve user information either from a manual or an electronic system

Collecting the Evidence

1 If your performance evidence does not cover all the needs in R1, you must show your assessor that you understand why these needs arise and how you would recall material to meet them. You can do this by using one of the following:

- showing how you have dealt with these aspects on (recent) earlier occasions
- witness testimony from your manager

You should discuss this when planning your assessment with your assessor.

1 You are expected to deal with the non-return of material (criterion 5). If this does not happen when your assessor observes you, you can produce evidence from other sources, such as:

- notes which you have kept, describing how you dealt with such incidents at work
- witness testimony from your manager
- answers to 'What if...?' questions put by your assessor

Unit IL2/5 Issue and recover loan material

Element IL2/5.5

Recover loan material

You show that you can

- 1 confirm accurately that the material belongs to your organisation
- 2 accurately and promptly record the return of material on the system
- 3 obtain information about the loan of the material promptly from the system
- 4 check the condition of material for any obvious signs of damage or missing parts
- 5 promptly do what you are authorised to do, to deal with damaged or incomplete material
- 6 determine whether any charges are payable
- 7 correctly calculate and politely request any payments due
- 8 waive payments, when you are authorised to do so and the user is eligible for exemption
- 9 activate correctly any security devices applied to the material
- 10 promptly process the material, when it is reserved for others

You understand

Why

K1 the ownership of the material should be confirmed

How

K2 to process return materials

K3 to identify whether returned material has been reserved by another user

What

K4 your organisation's policy is on charges, fines and exemptions

K5 authority and discretion you have to waive charges and fines

K6 to look for to assess the condition of returned material, including:

- cleanliness
- signs of damage
- signs of incompleteness

K7 action you are authorised to take to deal with damaged or incomplete material

K8 security devices are used by your organisation

Unit IL2/5 Issue and recover loan material

Element IL2/5.5

Recover loan material

Performance Evidence

You must produce evidence from your work that you recover loan material on two occasions, each of which will be observed by your assessor.

You show, in your performance, that

R1 you recover at least two of the following types of material:

- books
- journals
- audio material
- video material
- CD ROMs

R2 ... recording the return on either a manual or an electronic system

R3 you re-activate at least one of the following security devices:

- security labels
- triggers
- tags

Collecting the Evidence

1 If your performance evidence does not cover all the types of material in R1 or all the security devices in R3, you must show your assessor that you can deal with these situations. In particular, you must show that you understand the differences between checking the condition of different types of material. You can produce further evidence by using one or more of the following:

- showing how you have dealt with these aspects on (recent) earlier occasions
- witness testimony from your manager
- answers to 'What if...?' questions put by your assessor

You should discuss this when planning your assessment with your assessor.

1 If, when your assessor observes you, your evidence does not cover the exceptional circumstances that may arise (damaged material, payment of fines, waiving charges), you will need to produce further evidence that you can deal with these situations. You can do this by using one or more of the following:

- notes which you have kept, describing how you dealt with such incidents at work
- witness testimony from your manager
- answers to 'What if...?' questions put by your assessor

Unit IL2/6 Enable the use of Information Technology (ITNTO 201)

Element IL2/6.1	Prepare for the use of Information Technology
Element IL2/6.2	Follow procedures when using Information Technology
Element IL2/6.3	Conclude the use of Information Technology

About this unit

It is envisaged that your evidence for this unit will normally show you have worked competently over a minimum period of three months.

This unit is for anyone who is required to use Information Technology in routine operations. It is a unit in Option Group 1 – User Services – of the Information and Library Services Level 2 NVQ/SVQ.

It describes the routine operations required to enable the use of Information Technology when carrying out your duties.

You

- power up equipment and load materials and media
- identify sources of data, which are stored electronically
- follow procedures when using Information Technology
- adopt correct working methods
- avoid damage to the working environment, preserving system integrity and dealing with errors
- keep an accurate log for equipment errors
- close down the equipment, save and store required work and unload and store materials and media

Key words

Certain Key Words are listed and defined at the end of this Unit. You should use these definitions to clarify the meaning of these terms in the outcomes. The Key Words are:

**Close down; Customer; Electronically stored data; Equipment; Initialisation;
Input devices; Legislation; Materials; Output devices; Problems; Real Work; Realistic
Working Environment; Real working environment; System integrity; System security;
Working data**

Your evidence for this unit may contribute towards evidence for achievement of the following Key and Core Skills

(continued)

Unit IL2/6 Enable the use of Information Technology (ITNTO 201)

Core skills

Oral Communication Intermediate 1: Produce and respond to straightforward oral communication

Problem Solving (Critical Thinking) Intermediate 1: Analyse a straightforward situation or issue

Problem Solving (Planning and Organising) Intermediate 1: Plan, organise and complete a straightforward task

Using Information Technology Intermediate 2: Using an IT system effectively and responsibly to process a range of information

Working With Others Intermediate 1: Work with others in a group to complete a straightforward activity

Written Communication (Writing) Intermediate 1: Produce simple but detailed written communication

Key skills

Communication: 2.3 Write two different types of document about straightforward subjects

Information Technology: 2.1 Search for and select information for two different purposes

Problem Solving: 2.1 Identify a problem and come up with two options for solving it
2.2 Plan and try out at least one option for solving the problem, obtaining support and making changes to your plan when needed
2.3 Check if the problem has been solved by applying given methods, describe results and explain your approach to problem solving

Unit Keywords

These definitions and explanations illustrate how key words and phrases are used in this unit

Close down Returning the Information Technology solution to a specified state after use (may involve exiting or logging-out from software or powering off hardware).

Customer The person or organisation on whose behalf the Information Technology is being used. May be yourself.

Electronically stored data Data files stored on the fixed or a removable storage disk.

Equipment The hardware components of the Information Technology Solution (eg monitor screens, printers, disk drives).

Initialisation System dependent (eg formatting).

Input devices This could be a keyboard, scanner, digitiser or voice recognition system.

Legislation All applicable current local, national and EC laws.

Materials Items for use by the Information Technology equipment (eg paper, toner, storage media etc).

Output devices This refers to devices such as printers, pen plotters and audio speakers.

(continued)

Unit IL2/6 Enable the use of Information Technology (ITNTO 201)*Unit Keywords (continued)*

<i>Problems</i>	These may be problems with, for example, materials, equipment, software, data.
<i>Real Work</i>	This is where the product or service produced is required and used by a third party. It can be paid or unpaid.
<i>Realistic Working Environment</i>	An environment which reflects the expectations of industry and commerce by efficiently and effectively using currently acceptable Information Technology.
<i>Real working environment</i>	A working environment, which has not been principally created for candidate training or assessment purposes.
<i>System integrity</i>	Maintaining the condition of the system in a manner that allows correct subsequent operation (eg checking media for viruses).
<i>System security</i>	Prevention of unauthorised access to the system.
<i>Working data</i>	Intermediate or draft versions.

Unit IL2/6 Enable the use of Information Technology (ITNTO 201)

Element IL2/6.1

Prepare for the use of information technology

You show that you can...

So, you show that you...

- 1 the equipment allocated to you is suitable for the work to be carried out
- 2 your selection of materials meets customer requirements
- 3 you power up the equipment correctly to comply with regulations
- 4 your preparation of removable storage media ensures clear identification and ease of use
- 5 you correctly load required materials to comply with regulations
- 6 you correctly select and access the software which effectively meets customer requirements
- 7 you correctly identify relevant sources of electronically stored data
- 8 you promptly report any problems to the relevant person(s)
- 9 you obtain any necessary authority to access identified files

You understand

How to

- K1 assess the suitability of allocated equipment for given tasks
- K2 interpret customer requirements to select materials
- K3 power up equipment
- K4 prepare media for use
- K5 load materials
- K6 interpret customer requirements to select software
- K7 access software
- K8 identify electronically stored sources of relevant data
- K9 identify problems

What

- K10 customer requirements are for the work to be carried out
- K11 the factors are influencing the choice of type of Information Technology solution to be used
- K12 the factors are influencing the selection of particular equipment and materials to be used
- K13 the relevant content is of applicable regulations specified in the Range
- K14 the impact is of software licensing arrangements
- K15 the content and relevance is of available electronic sources of data
- K16 those data sources are for which access authority is required
- K17 person(s) to whom you report problems

Unit IL2/6 Enable the use of Information Technology (ITNTO 201)

Element IL2/6.1

Prepare for the use of information technology

Evidence Requirements

You must produce evidence from your work that you prepare for the use of information technology, over a period of time, observed by your assessor.

Your evidence shows that you can

R1 use::

- Installed processor
- Installed input devices
- Installed output devices

R2 and

- Removable storage media
- Consumables

R3 Regulations are:

- Current Legislation
- Health and Safety Regulations
- Manufacturer's Instructions
- Organisational procedures
- Supplier's Instructions

R4 Preparation covers:

- Initialisation
- Physical labelling

Collecting the Evidence

1 Typical work activities:

- interpreting customer requirements for materials
- preparing for the use of IT
- making ready media for use
- identifying electronic sources of data

2 Examples of Performance Evidence: The following examples illustrate the types of evidence, arising from your daily work, which you could collect to prove your competence

- demonstrating preparation activities to your assessor
- notes to others reporting problems

3 You may produce evidence from simulated activities for performance criteria d & e if naturally occurring performance evidence is not available

(continued)

Unit IL2/6 Enable the use of Information Technology (ITNTO 201)

Element IL2/6.1

Prepare for the use of information technology

Collecting the Evidence (continued)

- 4 You may provide supplementary evidence if performance evidence is not available for performance criteria h & i. Examples of Supplementary Evidence include:
- answers to written or oral questions from your assessor (These questions and answers will be recorded by your assessor)

Written or spoken reports describing:

- how you identified what your customer required
- how you ensured that the equipment, materials and software used met your customer's needs

Witness testimony

- statements from people who are able to comment on your work
- statements from those to whom you reported problems

Unit IL2/6 Enable the use of Information Technology (ITNTO 201)

Element IL2/6.2

Follow procedures when using information technology

You show that you can...

- 1 your methods of working comply with regulations
- 2 your methods of working avoid damage to the working environment
- 3 your working practices preserve system integrity and security and comply with organisational requirements
- 4 you promptly resolve any errors within your responsibility limits following organisational procedures
- 5 you promptly and clearly report any unresolved errors to the relevant person
- 6 your error log is accurate, complete and up to date

You understand

How to:

- K1 use equipment following manufacturer's and supplier's instructions
- K2 apply specified health and safety requirements, which are applicable to your own working environment
- K3 avoid creating risks in the working environment
- K4 follow the procedures for maintenance of system integrity and security
- K5 identify and handle errors within your job responsibility limits
- K6 complete an error log to meet your organisation's requirements

What

- K7 the reasons are for observing regulations within the working environment
- K8 the content and importance is of relevant health and safety requirements
- K9 your organisation's requirements are for working practices
- K10 the procedures are that are required to preserve system integrity
- K11 the importance is of maintaining an error log
- K12 the limits of your job responsibility are for resolving errors and the person(s) to whom you report

Unit IL2/6 Enable the use of Information Technology (ITNTO 201)

Element IL2/6.2

Follow procedures when using information technology

Evidence Requirements

You must produce evidence from your work that you follow procedures when using information technology, over a period of time, observed by your assessor.

Your evidence shows that:

- R1 you comply with:
- Current legislation
 - Health and Safety Regulations
 - Manufacturer's instructions
 - Organisational procedures
 - Supplier's instructions
- R2 you avoid damage to:
- Cabling
 - Equipment
 - Furniture
- R3 you preserve the integrity and security of:
- Software
 - Stored data

Collecting the Evidence

- 1 Examples of Performance Evidence
 - your error logs
 - demonstrating to your assessor that you follow procedures when using Information Technology
- 2 Typical work activities:
 - routine checking and monitoring of the Information Technology working environment
 - maintaining records
- 3 Evidence from simulated activities is not acceptable for this outcome
- 4 You may provide supplementary evidence where performance evidence is not available for performance criteria d & e. Examples of Supplementary Evidence include:
 - answers to written or oral questions from your assessor (these questions and answers will be recorded by your assessor)

Written or spoken reports describing:

 - the measures you take to maintain system integrity and security
 - how you identify and deal with errors
 - how your monitoring activities comply with health and safety requirements

Witness testimony:

 - statements from people in a position to comment on your work
 - statements from those to whom you have reported errors

Unit IL2/6 Enable the use of Information Technology (ITNTO 201)***Element IL2/6.3****Conclude the use of information technology**You show that you can...*

- 1 you save any required working data to comply with organisational requirements
- 2 where specified, you correctly save files to a given remote physical location to comply with organisational requirements
- 3 you promptly delete any redundant files within your job responsibility limits
- 4 you obtain authority to delete redundant files that fall outside your job responsibility limits
- 5 you correctly unload any materials to comply with regulations
- 6 you safely store any unloaded materials in the designated locations
- 7 you correctly close down the hardware and software that are within your job responsibility limits to comply with regulations

You understand

How to

- K1 save and locate files
- K2 apply the organisational requirements that are applicable to removing, archiving and saving data
- K3 save files requiring special security arrangements
- K4 use file operations
- K5 unload and store materials
- K6 close down software
- K7 close down hardware

What

- K8 the limits of your job responsibility are and the person (s) to whom you report
- K9 the factors are influencing the choice of location for saving and securing data
- K10 the regulations are applicable to concluding the use of Information Technology
- K11 the relevant content is of the applicable regulations in the Range

Unit IL2/6 Enable the use of Information Technology (ITNTO 201)

Element IL2/6.3

Conclude the use of information technology

Evidence Requirements

You must produce evidence from your work that you conclude the use of information technology, over a period of time, observed by your assessor.

Your evidence shows that:

- R1 you meet organisational requirements for:
- Naming convention
 - Location
 - Frequency
 - Security
- R2 you unload:
- Removable storage media
 - Consumables
- R3 you comply with
- Current Legislation
 - Manufacturer's Instructions
 - Organisational procedures

Collecting the Evidence

- 1 Examples of Performance Evidence
 - printouts detailing file locations
 - demonstrating to your assessor Information Technology close down procedures
- 2 Typical work activities:
 - deleting redundant files
 - handling materials over a period of time
- 3 Concluding the use of the Information Technology System you may produce evidence from simulated activities for performance criteria e & f if naturally occurring performance evidence is not available
- 4 You may provide supplementary evidence where performance evidence is not available for performance criteria 2 & 4. Examples of Supplementary Evidence include:
 - answers to written or oral questions from your assessor (these questions and answers will be recorded by your assessor)

Written or spoken reports describing:

 - the actions taken when securing particular files to a specified location

Witness testimony

 - statements from people in a position to comment on your work
 - statements from those from whom you have gained authority to delete redundant files

Unit IL2/7 Provide and maintain information for clients (CAMPAG A10)**Element IL2/7.1****Provide information to clients****Element IL2/7.2****Maintain information for providing to clients***About this unit*

This unit is for you if, as part of your job, you help users by getting and providing information for them, which they may not be able to access for themselves. It is particularly suitable for those working in voluntary organisations and with students and pupils in universities, colleges and schools.

It is a unit in Option Group 1 – User Services – of the Information and Library Services Level 2 NVQ/SVQ.

You

- work with clients to identify the information they need
- give information to clients which is appropriate to their needs
- avoid stereotyping
- maintain information which you provide to clients in an accessible and orderly way
- make sure the information is up-to-date, avoids stereotyping and is appropriate

Key words

Certain Key Words are listed and defined at the end of this Unit. You should use these definitions to clarify the meaning of these terms in the outcomes. The Key Words are:

clients; stereotyping

Your evidence for this unit may contribute towards evidence for achievement of the following Key and Core Skills

Core skills

Oral Communication Intermediate 2: Produce and respond to oral communication

Problem Solving (Planning and Organising) Intermediate 1: Plan, organise and complete a straightforward task

Using Information Technology Intermediate 2: Using an IT system effectively and responsibly to process a range of information

Working With Others Intermediate 1: Work with others in a group to complete a straightforward activity

Written Communication (Reading) Intermediate 1: Read, understand and evaluate straightforward written communication

(continued)

Unit IL2/7 Provide and maintain information for clients (CAMPAG A10)

Key skills

- | | |
|--------------------------------|--|
| <i>Communication:</i> | 2.3 Write two different types of document about straightforward subjects |
| <i>Information Technology:</i> | 2.1 Search for and select information for two different purposes
2.2 Explore and develop information and derive new information for two different purposes |
| <i>Working with Others:</i> | 2.1 Plan straightforward work with others, identifying objectives and clarifying responsibilities and confirm working arrangements
2.2 Work cooperatively with others towards achieving identified objectives, organising tasks to meet your responsibilities |

Unit Keywords

Client(s)

In this Unit a client is a user of your organisation's services.

Stereotyping

If you stereotype someone, you apply a fixed general idea or image to them, and assume that they will behave in a particular way, or will have certain attitudes, characteristics or opinions.

Unit IL2/7 Provide and maintain information for clients (CAMPAG A10)

Element IL2/7.1

Provide information to clients

You show that you can

- 1 identify, with clients, the information needed
- 2 avoid stereotyping and personal bias, when you identify clients' needs
- 3 give information to clients which is sufficient and appropriate to their needs
- 4 give accurate, up-to-date information to clients which avoids stereotyping
- 5 use language, a medium, manner and pace, when providing information, which is appropriate to individual clients
- 6 refer clients to an alternative source, where they require further information

You understand

What

- K1 the range of relevant sources of information is
- K2 sources of information clients can access
- K3 the different sources of information are
- K4 information storage and retrieval systems there are, both manual and computer-based, including their physical location, classification systems and methods of accessing them
- K5 Equal Opportunities legislation and good practice applies
- K6 your organisation's equal opportunities policy and code of practice are
- K7 stereotyping within information is, and ways of avoiding it

Unit IL2/7 Provide and maintain information for clients (CAMPAG A10)

Element IL2/7.1

Provide information to clients

Performance Evidence

You must produce evidence from your work that you provide information to five clients over a period of time.

You must explain to your assessor the information given to five clients, together with an explanation of how it was tailored to meet their individual requirements. This evidence must be corroborated by witness testimony from your immediate line manager or equivalent.

Your evidence must show that

R1 you use a medium of information given to clients which is:

- accessible to individual clients
- meaningful to individual clients

R2 you use language taking into account:

- differing client abilities and language needs
- avoiding stereotyping

Collecting the Evidence

- 1 You should agree with your assessor how you will collect evidence for this outcome. This will probably come in the form of a portfolio, built up over a period of time and recording the information you have given to users.
- 2 When planning assessment, look for opportunities to collect evidence at the same time that you do so for other units, especially Unit 2, and for other outcomes in this Unit.

Unit IL2/7 Provide and maintain information for clients (CAMPAG A10)***Element IL2/7.2****Maintain information for providing to clients**You show that you can*

- 1 store information in a way which conforms to policy on confidentiality
- 2 use storage systems which comply with organisational procedures
- 3 store and classify information for easy retrieval for all users
- 4 keep information up-to-date, and check that it avoids stereotyping and is appropriate for clients
- 5 maintain sufficient supplies of information
- 6 report any difficulties with information to an appropriate person

You understand

What

- K1 your organisation's procedures for storage of information are
- K2 organisational policy is on confidentiality
- K3 information storage and retrieval systems are in use, both manual and computer-based, including their physical location, classification systems and methods of accessing them
- K4 Equal Opportunities legislation and good practice applies
- K5 your organisation's equal opportunities policy and codes of practice are
- K6 stereotyping within information is, and ways of avoiding it

Unit IL2/7 Provide and maintain information for clients (CAMPAG A10)

Element IL2/7.2

Maintain information for providing to clients

Performance Evidence

You must produce evidence from your work that you maintain information for providing to clients over a period of time.

You must explain, to your assessor, how you store information for clients to use, together with an explanation of how you meet the requirements of criteria 3, 4 and 5. This evidence must be corroborated by witness testimony from your immediate line manager or equivalent.

Your evidence must also show that

R1 you report difficulties with information in relation to:

- storage
- supplies
- appropriateness for clients

Collecting the Evidence

- 1 You should agree with your assessor how you will collect evidence for this outcome. This will probably come in the form of a portfolio, built up over a period of time and recording how you store information for users.
- 2 When planning assessment, look for opportunities to collect evidence at the same time that you do so for other units, especially Unit 2, and for other outcomes in this Unit.

Unit IL2/8 Process payments for purchases (DNTO 19 Level 2)

Element IL2/8.1
Element IL2/8.2

Calculate the price of customers' purchases
Process sales payments

About this unit

This unit is for you if, as part of your job, you are responsible for receiving payment from users for information and material which they purchase. It is a unit in Option Group 1 – User Services – of the Information and Library Services Level 2 NVQ/SVQ.

You

- calculate the price of purchases
- check that items are in fit condition for sale
- check that money offered is not counterfeit
- process payments
- offer assistance to the customer

Key words

Certain Key Words are listed and defined at the end of this Unit. You should use these definitions to clarify the meaning of these terms in the outcomes. The Key Words are:

products; stock

Your evidence for this unit may contribute towards evidence for achievement of the following Key and Core Skills

Core skills

Oral Communication Intermediate 2: Produce and respond to oral communication

Using Information Technology Intermediate 1: Using an IT system effectively to perform a range of straightforward tasks

Using Number Intermediate 2: Apply a wide range of numerical skills in everyday and generalised contexts

Working With Others Intermediate 1: Work with others in a group to complete a straightforward activity

Written Communication (Reading) Intermediate 1: Read, understand and evaluate straightforward written communication

Written Communication (Writing) Intermediate 1: Produce simple but detailed written communication

Key skills

Communication: 2.3 Write two different types of document about straightforward subjects

Application of Number: 1.2 Carry out straightforward calculations to do with: amounts and sizes, scales and proportion, handling statistics

(continued)

Unit IL2/8 Process payments for purchases (DNT0 19 Level 2)

Unit Keywords

Products

Items which your organisation offers for sale.

Stock

In this Unit, 'stock' refers to the stock of items which your organisation offers for sale.

Unit IL2/8 Process payments for purchases (DNT0 19 Level 2)***Element IL2/8.1****Calculate the price of customers' purchases**You show that you can*

- 1 identify the price of items accurately
- 2 promptly resolve problems in pricing goods, by using available sources of information and advice
- 3 make correct calculations
- 4 make calculations at a pace which balances the need for accuracy and customer care with the need to process sales quickly
- 5 inspect purchases visually for condition and quality as they are processed
- 6 take action promptly to provide customers with satisfactory products, when faults or discrepancies in items are observed
- 7 conduct the transaction courteously, and in a manner appropriate to the customer and the context

You understand

Why

K1 customer service is important to effective operations

What

K2 the local procedures are for identifying and checking prices

K3 sources of information and advice to use, to deal with pricing problems

K4 to look for to identify any defects in products as they are being processed for sale (eg damage, loose packaging, cracks, defects in food products, etc.)

K5 the terms of current discounts and special offers are (eg 2-for-1 offers, coupons, etc.)

K6 the rights, duties and responsibilities are relating to the Sale of Goods Act

K7 the copyright issues are affecting the sale of items

Unit IL2/8 Process payments for purchases (DNTO 19 Level 2)

Element IL2/8.1

Calculate the price of customers' purchases

Performance Evidence

You must produce evidence from your work that you can calculate the price of customers' purchases during both normal and busy periods. Your assessor will observe you on at least two occasions.

You show, in your performance, that you achieve the outcome

R1 when using the following sources of information and advice:

- written
- colleagues and management

R2 when calculating the price of at least one of the following types of purchase:

- stock items
- special offers and discounts

Collecting the Evidence

1 If your performance evidence does not cover all types of purchases (R2), you must show your assessor that you meet the outcome for these aspects. You can do this by using one of the following:

- witness testimony from your manager
- showing how you have dealt with these aspects on (recent) earlier occasions
- completing a task or assignment set by your assessor
- answering questions put to you by your assessor

You should discuss this when planning your assessment with your assessor.

1 Performance criteria 2 and 6 describe situations which may not arise when the performance evidence is collected. When this happens, look for evidence from other sources, such as:

- witness testimony from your manager or supervisor
- answers to 'what if...?' questions put by your assessor

2 When you plan assessment, look for occasions when you can be observed achieving this outcome at the same time that you are observed achieving other outcomes in this Unit.

Unit IL2/8 Process payments for purchases (DNT0 19 Level 2)

Element IL2/8.2

Process sales payments

You show that you can

- 1 clearly and accurately inform customers of the amount due
- 2 confirm the amount given and the change tendered
- 3 confirm that you have authorisation for accepting non-cash payments, when the value of the item exceeds specified limits
- 4 tactfully inform the customer when authorisation cannot be obtained for non-cash payments
- 5 complete documentation associated with payments accurately
- 6 identify and promptly remedy discrepancies and errors
- 7 store payments securely and protect them from theft
- 8 offer assistance in packaging and transporting purchases, when these facilities are available
- 9 conduct the transaction courteously and in a manner appropriate to the customer and the context

You understand

Why

- K1 it is necessary to secure cash and cash equivalents
- K2 customer service is important to effective trading operations

How

- K3 to identify counterfeit payments

What

- K4 procedures to use for dealing with customers offering suspected illegal tender
- K5 the copyright implications are of taking payment for items

Unit IL2/8 Process payments for purchases (DNTO 19 Level 2)

Element IL2/8.2

Process sales payments

Performance Evidence

You must produce evidence from your work that you can process sales payments during both normal and busy periods. Your assessor will observe you on at least two occasions.

You show, in your performance, that

R1 you can deal with the following types of sales documentation:

- till receipts and records
- credit and charge card slips

R2 ... when processing the following types of payment:

- cash
- cheques
- credit and charge cards

R3 ... for purchases of at least one of the following types:

- stock items
- special offers and discounts

Collecting the Evidence

1 If your performance evidence does not cover all of R1, R2 and R3, you must show your assessor that you can deal with this range of requirements. You can do this by using one of the following:

- witness testimony from your manager
- answering questions put to you by your assessor
- showing how you have dealt with these aspects on (recent) earlier occasions
- completing an assignment set by your assessor

You should discuss this when planning your assessment with your assessor.

1 It may be possible to collect sufficient evidence to cover all the ranges within a month. This will depend on the type of retail operation in which you work. You should consider this when planning assessment with your assessor.

2 Performance criteria 3, 4, 6 and 8 describe situations which may not arise when the performance evidence is collected. When this happens, look for evidence from other sources, such as:

- witness testimony from your manager or supervisor
- answers to 'what if...?' questions

3 When you plan assessment, look for occasions when you can be observed achieving this outcome at the same time that you are observed achieving other outcomes in this Unit.

National Occupational Standards

Option Group 2: Activities

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Unit IL2/9 Process and secure information and material

Element IL2/9.1	Mark and protect material
Element IL2/9.2	Assess material for cleaning and repair
Element IL2/9.3	Operate and monitor systems to secure information and material
Element IL2/9.4	Monitor user's treatment of material

About this unit

This unit is for you if, as part of your job, you mark and protect material, assess material for cleaning and deal with routine security arrangements. It is a unit in Option Group 2 – Activities – in the Information and Library Services Level 2 NVQ/SVQ. Before selecting this unit, you should check that it matches the requirements for security in your organisation.

You

- mark material with the organisation's identification
- protect material from damage
- assess whether material needs repair or cleaning
- assess options for dealing with damaged material
- make sure that security systems are working effectively
- deal with breaches of security
- monitor the way users treat material
- deal with offences

Key words

Certain Key Words are listed and defined at the end of this Unit. You should use these definitions to clarify the meaning of these terms in the outcomes. The Key Words are:

classification notations; systems

Your evidence for this unit may contribute towards evidence for achievement of the following Key and Core Skills.

Core skills

Oral Communication Intermediate 1: Produce and respond to straightforward oral communication

Problem Solving (Planning and Organising) Intermediate 2: Plan, organise and complete a task

Working With Others Intermediate 2: Work with others in a group to analyse, plan and complete an activity

Written Communication (Reading) Intermediate 1: Read, understand and evaluate straightforward written communication

Written Communication (Writing) Intermediate 1: Produce simple but detailed written communication

(continued)

Unit IL2/9 Process and secure information and material

Key skills

Communication:

- 2.1a Contribute to a discussion about a straightforward subject
- 2.1b Give a short talk about a straightforward subject using an image
- 2.2 Read and summarise information from two extended documents about a straightforward subject
- 2.3 Write two different types of document about straightforward subjects

Problem Solving:

- 2.1 Identify a problem and come up with two options for solving it
- 2.2 Plan and try out at least one option for solving the problem, obtaining support and making changes to your plan when needed
- 2.3 Check if the problem has been solved by applying given methods, describe results and explain your approach to problem solving

Working with others:

- 2.2 Work cooperatively with others towards achieving identified objectives, organising tasks to meet your responsibilities
- 2.3 Exchange information on progress and agree ways of improving work with others to help achieve objectives

Unit Keywords

Classification notation

The arrangements used by your organisation to assign a unique reference number to each item in its collection.

Systems

In this Unit, 'systems' means the arrangements in place in your organisation for protecting the security of material.

Unit IL2/9 Process and secure information and material

Element IL2/9.1

Mark and protect material

You show that you can

- 1 clearly and accurately mark the material with your organisation's identification in the places designated by your organisation
- 2 attach identification numbers and classification notations to the material in the way prescribed by the instructions you have been given
- 3 find out the correct location for the material, and mark the material accurately, when codes have to be shown
- 4 mark materials indelibly and attach markings securely
- 5 determine correctly the level of protection required for the material, by assessing accurately the demand for the material and its value and nature, using your organisation's policies as the benchmark
- 6 put material neatly and securely in protective casing, when this is required
- 7 obtain any back-up copies which are required promptly
- 8 implement access arrangements correctly

You understand

Why

- K1 material is marked
- K2 it is necessary to protect material

How

- K3 to find the correct location for material
- K4 to obtain back-up copies

What

- K5 your organisation's rules are on marking, classifying and protecting material
- K6 types of marking are appropriate for different types of material, such as labels, stamps, price tickets, hand-written notations
- K7 codes are used for different locations, such as branch, department, box number, shelf number or store
- K8 protective casings your organisation uses, and when to use them
- K9 copyright issues affect marking and protection

Unit IL2/9 Process and secure information and material

Element IL2/9.1

Mark and protect material

Performance Evidence

You must produce evidence from your work that you can mark and protect material on two occasions, each of which will be observed by your assessor.

You show, in your performance, that

R1 you can use at least one of the following methods:

- stamping
- labelling and ticketing
- writing notations

R2 ... when marking and protecting at least two of the following types of material:

- papers and parchment
- books
- journals
- audio/video material
- CD ROMs
- leaflets
- microfiches and microfilm

Collecting the Evidence

1 If your performance evidence does not cover all of R1 and R2, you must show your assessor that you understand these aspects of the outcome. You can do this by using one of the following:

- showing how you have dealt with these aspects on (recent) earlier occasions
- answering questions put to you by your assessor
- witness testimony from your manager

You should discuss this when planning your assessment with your assessor.

2 If your understanding of your organisation's policies and procedures for marking, classification and protection are not apparent in your performance evidence, your assessor will ask you questions to check this.

Unit IL2/9 Process and secure information and material

Element IL2/9.2

Assess material for cleaning and repair

You show that you can

- 1 assess accurately damage to material
- 2 determine whether there is a need to change arrangements for accessing the material and present your recommendations clearly
- 3 identify and evaluate options for dealing with damaged material
- 4 select a course of action which you can justify, given the value of the material and the nature of the damage
- 5 implement your course of action promptly, when it is within your authority to do so
- 6 present your recommendations for action clearly to a person in authority, when you are proposing action outside the scope of your job
- 7 promptly and carefully remove items which are harmful to the material
- 8 pass the material promptly to someone who can deal with it, when its assessment or treatment is outside the scope of your job

You understand

Why

- K1 access arrangements may need to be revised
- K2 action to deal with damage must be consistent with the nature and value of the material

How

- K3 to assess damage to material

What

- K4 types of damage can occur to material
- K5 items can harm material, such as paper clips, elastic bands, book marks or food
- K6 your organisation's standards are for material
- K7 options for repairing or cleaning material there are
- K8 sources for repair there are
- K9 copyright issues affect the material

Unit IL2/9 Process and secure information and material

Element IL2/9.2

Assess material for cleaning and repair

Performance Evidence

You must produce evidence from your work that you can assess material for cleaning and repair on two occasions, each of which will be observed by your assessor.

You show, in your performance, that

- R1 you assess the damage from at least two of the following causes:
- environmental problems
 - vandalism and careless use
 - normal wear and tear
- R2 ... to at least two of the following types of material:
- papers and parchment
 - books
 - journals
 - audio/video material
 - CD ROMs
 - leaflets
 - microfiches and microfilm
- R3 you consider at least two of the following options:
- replacement (such as photocopying)
 - withdrawal
 - transfer to an alternative format, such as digitising the material, or creating a microfiche
 - binding

Collecting the Evidence

- 1 If your performance evidence does not cover all of R1, R2 and R3, you must show your assessor that you understand these aspects of the outcome. You can do this by using one of the following:
- showing how you have dealt with these aspects on (recent) earlier occasions
 - answering questions put to you by your assessor

You should discuss this when planning your assessment with your assessor.

Unit IL2/9 Process and secure information and material

Element IL2/9.3

Operate and monitor systems to secure information and material

You show that you can

- 1 operate security systems safely, and as they are designed to operate
- 2 attach, detach, activate and de-activate security devices without danger to the material or the user
- 3 check warning systems enough times to identify any faults or failures
- 4 take remedial action promptly, if warning systems are faulty or fail
- 5 promptly and thoroughly investigate warnings when systems are activated, and, when you find out what has happened, act promptly to protect material and users, or restore the system to normal operation
- 6 keep accurate records, in the form required, when incidents occur

You understand

Why

K1 you should monitor security systems

How

K2 to operate security systems

K3 to use security devices safely

K4 to deal with warnings and incidents

What

K5 your organisation's policies are on the security of staff, users and material

K6 legal regulations and issues affect security

K7 your organisation's rules, procedures and guidelines are for dealing with different types of incident

K8 records to keep, and what forms to use

Unit IL2/9 Process and secure information and material

Element IL2/9.3

Operate and monitor systems to secure information and material

Performance Evidence

You must produce evidence from your work that you operate and monitor systems to secure information and material on two occasions, each of which will be observed by your assessor.

You show, in your performance, that

R1 you can operate and monitor either manual or automated security systems

R2 you can use safely at least one of the following security devices:

- security labels
- tags
- passwords

R3 ... when dealing with the security of two of the following types of material:

- papers and parchment
- books
- journals
- serials
- audio/video material
- CD ROMs
- microfiches and microfilm
- pictures

Collecting the Evidence

1 If your performance evidence does not cover all of R1, R2, and R3, you must show your assessor that you understand these aspects of the outcome. You can do this by using one of the following:

- showing how you have dealt with these aspects on (recent) earlier occasions
- witness testimony from your manager
- answering questions put to you by your assessor
- a task set by your assessor

You should discuss this when planning your assessment with your assessor.

2 You are expected to deal with system faults or failures (criterion 4) and security (criterion 5). These situations may not arise when your assessor observes you. If this is the case, you can produce evidence from other sources, such as:

- notes which you have kept, describing how you dealt with such incidents at work
- witness testimony from your manager
- answers to 'What if...?' questions put by your assessor

Unit IL2/9 Process and secure information and material

Element IL2/9.4

Monitor user's treatment of material

You show that you can

- 1 explain any special instructions for handling material clearly to users
- 2 monitor the way users treat material sufficiently to identify any threats to the material
- 3 identify and deal with offences by users in a way which is consistent with the law and local procedures
- 4 identify lost material accurately and report it promptly
- 5 review the security rules and procedures for users in the light of users' actual behaviour, and identify recommendations for improving security
- 6 present your recommendations clearly to a person in authority

You understand

Why

K1 it is important to monitor the way users handle material

How

K2 to identify offences

K3 to assess losses

What

K4 your organisation's rules are for dealing with offences

K5 legal regulations affect this standard

K6 types of offence may be committed, including:

- theft
- unauthorised removal
- deliberate damage
- accidental damage
- unauthorised copying
- hacking

Unit IL2/9 Process and secure information and material

Element IL2/9.4

Monitor user's treatment of material

Performance Evidence

You must produce evidence from your work that you monitor users' treatment of material on two occasions, each of which will be observed by your assessor.

You show, in your performance, that

- R1 you use either manual or automated monitoring procedures
- R2 you monitor the following types of user:
 - individuals
 - groups
- R3 ... who may be:
 - experienced users or
 - inexperienced users
 - internal users or
 - external users

Collecting the Evidence

- 1 If your performance evidence does not cover all of R1, R2 and R3, you must show your assessor that you understand these aspects of the outcome. You can do this by using one of the following:
 - showing how you have dealt with these aspects on (recent) earlier occasions
 - witness testimony from your managerYou should discuss this when planning your assessment with your assessor.
- 2 You are expected to deal with offences (criterion 3) and lost material (criterion 4). If this does not happen when your assessor observes you, you can produce evidence from other sources, such as:
 - notes which you have kept, describing how you dealt with such incidents at work
 - witness testimony from your manager
 - answers to 'What if...?' questions put by your assessor

Unit IL2/10 Contribute to the maintenance of a supportive environment for users

Element IL2/10.1	Monitor the appearance of facilities and the physical environment
Element IL2/10.2	Assist in minimising disruptions to users
Element IL2/10.3	Collect and action comments from users

About this unit

This unit is for you if, as part of your job, you maintain the physical appearance of facilities for users, help to minimise disruption and take comments from users. It is a unit in Option Group 2 – Activities – in the Information and Library Services Level 2 NVQ/SVQ.

You

- check that user areas are clean and tidy
- tidy areas before and after use
- deal with incidents which disrupt users
- collect comments from users and advise them on how these are dealt with

Key words

Certain Key Words are listed and defined at the end of this Unit. You should use these definitions to clarify the meaning of these terms in the outcomes. The Key Words are:

disruption; facilities

Your evidence for this unit may contribute towards evidence for achievement of the following Key and Core Skills

Core skills

Oral Communication Intermediate 2: Produce and respond to oral communication

Problem Solving (Critical Thinking) Intermediate 1: Analyse a straightforward situation or issue

Working With Others Intermediate 1: Work with others in a group to complete a straightforward task

Written Communication (Reading) Intermediate 1: Read, understand and evaluate straightforward written communication

Written Communication (Writing) Intermediate 2: Produce well-structured written communication

Key skills

Communication: 2.3 Write two different types of document about straightforward subjects

Problem Solving:

2.1 Identify a problem and come up with two options for solving it

2.2 Plan and try out at least one option for solving the problem, obtaining support and making changes to your plan when needed

2.3 Check if the problem has been solved by applying given methods, describe results and explain your approach to problem solving

(continued)

Unit IL2/10 Contribute to the maintenance of a supportive environment for users

- Working with others:*
- 2.2 Work cooperatively with others towards achieving identified objectives, organising tasks to meet your responsibilities
 - 2.3 Exchange information on progress and agree ways of improving work with others to help achieve objectives

Unit Keywords

Disruption Any event or action which needlessly prevents the user from continuing their activities. Disruptions may be caused by the behaviour of others, or by systems failures (eg lighting going off, computer failure) or by undue environmental noise.

Facilities The buildings, equipment and services available to users.

Unit IL2/10 Contribute to the maintenance of a supportive environment for users

Element IL2/10.1

Monitor the appearance of facilities and the physical environment

You show that you can

- 1 continuously check user areas for cleanliness and safety
- 2 keep user areas tidy and furniture arranged suitably for users
- 3 regularly tidy and position leaflets and items used for information so that they are visible and within reach
- 4 report clearly and promptly the need for repairs to facilities
- 5 remove items the condition of which is dangerous to users and staff

You understand

Why

K1 you should monitor the appearance of facilities and the physical environment

What

K2 your organisation's procedures are for repairing items of furniture and damage to the physical environment

K3 health and safety regulations affect the cleanliness and tidiness of the physical environment

Unit IL2/10 Contribute to the maintenance of a supportive environment for users

Element IL2/10.1

Monitor the appearance of facilities and the physical environment

Performance Evidence

You must produce evidence from your work that you can monitor the appearance of facilities and the physical environment on two occasions, each of which will be observed by your assessor.

You show, in your performance, that

R1 you monitor on at least two of the following occasions:

- at opening times
- throughout the day
- at closing times
- after closing times

R2 you monitor:

- chairs and tables
- shelves and drawers accessible to users
- leaflet displays

Collecting the Evidence

1 If your performance evidence does not cover all of R1 and R2, you must show your assessor that you understand these aspects of the outcome. You can do this by using one of the following:

- showing how you have dealt with these aspects on (recent) earlier occasions
- answering questions put to you by your assessor
- witness testimony from your manager

You should discuss this when planning your assessment with your assessor.

Unit IL2/10 Contribute to the maintenance of a supportive environment for users

Element IL2/10.2

Assist in minimising disruptions to users

You show that you can

- 1 identify and minimise any disruption to users promptly, by taking action which is within your authority
- 2 assess swiftly the circumstances causing disruption and offer appropriate assistance
- 3 promptly get the assistance of colleagues, when necessary
- 4 clearly and promptly report incidents in the form required

You understand

Why

K1 it is necessary to prevent certain kinds of behaviour

K2 it is important to get help, when you need to

How

K3 to assess the causes of disruption

K4 to best avoid disruptive situations

What

K5 types of user use your organisation's services

K6 your organisation's policy is, for meeting users' needs

K7 legal regulations apply to dealing with disruptions

K8 your organisation's policy is for dealing with disruptions

Unit IL2/10 Contribute to the maintenance of a supportive environment for users

Element IL2/10.2

Assist in minimising disruptions to users

Performance Evidence

You must produce evidence from your work that you can assist in minimising disruptions to users on two occasions, each of which will be observed by your assessor.

You show, in your performance, that

R1 you deal with disruptions in at least one of the following environments:

- self-service areas
- restricted areas
- invigilated areas

R2 you deal with disruption whether caused by other users or by the organisation

R3 you can seek support from at least one of the following:

- colleagues
- police
- security staff

Collecting the Evidence

1 If your performance evidence does not cover all of R1, R2 and R3, you must show your assessor that you understand these aspects of the outcome. You can do this by using one of the following:

- showing how you have dealt with these aspects on (recent) earlier occasions
- answering questions put to you by your assessor

You should discuss this when planning your assessment with your assessor.

Unit IL2/10 Contribute to the maintenance of a supportive environment for users

Element IL2/10.3

Collect and action comments from users

You show that you can

- 1 show care and consideration in listening to and noting users' comments
- 2 record comments accurately
- 3 explain clearly to users the procedure for dealing with comments
- 4 identify accurately whether the user needs other assistance and offer it promptly
- 5 pass recorded comments promptly to an authorised person

You understand

Why

K1 it is important to collect users' comments

What

K2 your organisation's standards of service are

K3 user groups use your organisation's services

K4 your organisation's policy is for meeting users' needs

Unit IL2/10 Contribute to the maintenance of a supportive environment for users

Element IL2/10.3

Collect and action comments from users

Performance Evidence

You must produce evidence from your work that you collect and action comments from users on two occasions, each of which will be observed by your assessor.

You show, in your performance, that

R1 you collect comments on at least two of the following:

- material
- facilities
- services
- staff
- equipment

R2 ... when the comments are made in at least one of the following ways:

- in person
- face-to-face
- in writing

R3 you collect at least one of the following types of comment:

- favourable
- unfavourable
- suggestions for improvement

R4 ... from at least one of the following types of user:

- individuals
- groups

Collecting the Evidence

1 If your performance evidence does not cover all of R1, R2, R3, and R4 you must show your assessor that you understand these aspects of the outcome. You can do this by using one of the following:

- showing how you have dealt with these aspects on (recent) earlier occasions
- witness testimony from your manager
- answering questions put to you by your assessor
- a task set by your assessor

You should discuss this when planning your assessment with your assessor.

Unit IL2/11 Display stock to specification to attract customer interest and promote sales (DNT0 1 Level 2)

Element IL2/11.1	Plan to set up displays to specification
Element IL2/11.2	Set up, maintain and dismantle display areas
Element IL2/11.3	Label displays of stock

About this unit

This unit is for you, if, as part of your job, you arrange displays. It is a unit in Option Group 2 – Activities – of the Information and Library Services Level 2 NVQ/SVQ.

You

- find out what the display should look like
- find out where the display should be located, and what materials you need
- assemble displays safely
- maintain displays while they are in use
- dismantle displays safely
- keep display areas clean and safe
- label displays

Key words

Certain Key Words are listed and defined at the end of this Unit. You should use these definitions to clarify the meaning of these terms in the outcomes. The Key Words are:

customer; product(s); stock

Your evidence for this unit may contribute towards evidence for achievement of the following Key and Core Skills

Core skills

Oral Communication Intermediate 1: Produce and respond to straightforward oral communication

Problem Solving (Critical Thinking) Intermediate 2: Analyse a situation or issue

Problem Solving (Planning and Organising) Intermediate 2: Plan, organise and complete a task

Using Information Technology Intermediate 2: Using an IT system effectively and responsibly to process a range of information

Working With Others Intermediate 2: Work with others in a group to analyse, plan and complete an activity

Written Communication (Writing) Intermediate 1: Produce simple but detailed written communication

Key skills

- Communication:*
- 2.1b Give a short talk about a straightforward subject using an image
 - 2.3 Read and summarise information from two extended documents about a straightforward subject

(continued)

Unit IL2/11 Display stock to specification to attract customer interest and promote sales (DNT0 1 Level 2)

Key skills (continued)

- Application of Number:*
- 1.2 Carry out straightforward calculations to do with amounts and sizes, scales and proportion, handling statistics
 - 1.3 Interpret the results of your calculations and present your findings using one chart and one diagram

Unit Keywords

Customer

A customer is a user of your organisation's services.

Product(s)

In this Unit, a product is an item which your organisation offers for sale, or displays to attract the interest of users.

Stock

In this Unit, stock refers to both the items which your organisation offers for sale and other items used in displays.

Unit IL2/11 Display stock to specification to attract customer interest and promote sales (DNT0 1 Level 2)

Element IL2/11.1

Plan to set up displays to specification

You show that you can

- 1 identify the purpose and requirements of the display from the available information
- 2 seek clarification, where the information is incomplete, or is not clear
- 3 correctly identify the location of the display area within the premises and the effect this has on access
- 4 correctly identify, and check the availability of, the materials, equipment and stock that will be required to set up and maintain the display
- 5 correctly calculate the space required and available for the display, note any discrepancies and inform the appropriate person
- 6 check that plans for presentation areas are consistent with operational needs and constraints, and minimise risks to the health and safety of staff and customers
- 7 take account of operational constraints, when you prepare to set up the display

You understand

Why

K1 it is important to check plans for potential health and safety hazards

How

K2 the positioning of products can attract attention and promote sales

What

K3 techniques can be used for checking

K4 your organisation's display standards are

K5 rights, duties and responsibilities apply, under relevant legislation such as The Sale of Goods Act

Who

K6 to seek clarification from

K7 needs reports on problems with available and required space

Where

K8 to access information about the required display

Unit IL2/11 Display stock to specification to attract customer interest and promote sales (DNT0 1 Level 2)

Element IL2/11.1

Plan to set up displays to specification

Performance Evidence

You must produce evidence from your work that you can plan to set up displays to specification during both normal and busy periods. Your assessor will observe you on at least two occasions.

You show, in your performance, that

- R1 you meet the requirements for:
- stock and space
 - location and duration
 - safety and security
 - standards of display
- R2 ... when planning displays:
- to introduce new stock
 - to increase sales of existing stock
- R3 you check that the plan meets the following operational needs and constraints:
- design and layout of the sales area
 - stock and space availability
 - required standard

Collecting the Evidence

- 1 If your performance evidence does not cover all of R1, R2 and R3, you must show your assessor that you can achieve the outcome for these aspects. You can do this by using one of the following:
- witness testimony from your manager
 - showing how you have dealt with these aspects on (recent) earlier occasions
 - completing a task or assignment set by your assessor
 - answering questions put to you by your assessor

You should discuss this when planning your assessment with your assessor.

- 1 Much of the evidence of your ability to achieve this outcome may be obtained by your assessor questioning you about your planning while looking at the displays that you have set up when collecting evidence for the second outcome in this Unit.
- 2 **Operational constraints and needs** include other activities going on in the work area, and constraints on space available for display. They may arise from requirements to maintain health and safety, security, hygiene and customer access.
- 3 Copies of sketches, charts and notes produced in the planning process may provide useful evidence towards this outcome.
- 4 When you plan assessment, look for occasions when you can be observed achieving this outcome at the same time that you are observed achieving other outcomes in this Unit.

Unit IL2/11 Display stock to specification to attract customer interest and promote sales (DNT0 1 Level 2)

Element IL2/11.2

Set up, maintain and dismantle display areas

You show that you can

- 1 use materials and equipment in assembling the display which are consistent with those specified in plans
- 2 check display materials and equipment to confirm that they are clean, safe and in working order before use
- 3 correctly identify and clear, clean and prepare the display area adequately for the display
- 4 set up and dismantle the display safely according to the plan, and within the required time limits
- 5 make checks to confirm that the assembled display is clean, tidy and safe for use
- 6 clear the presentation area, following dismantling, clean and prepare the display for future use, return materials and equipment to storage and dispose of waste safely
- 7 maintain the display with adequate levels of stock

You understand

Why

- K1 it is important to check assembled displays for potential health and safety hazards, and what techniques can be used for checking
- K2 it is important that the materials and equipment used in displays are cleared and waste disposed of safely

How

- K3 to interpret plans and sketches to identify what is required
- K4 to use assembly and dismantling equipment safely and how to check that they are in working order
- K5 to identify and correct unsafe displays

What

- K6 your organisation's standards of cleaning and preparation of the display are

Where

- K7 to access plans for the display and with whom clarification should be sought

Unit IL2/11 Display stock to specification to attract customer interest and promote sales (DNT0 1 Level 2)

Element IL2/11.2

Set up, maintain and dismantle display areas

Performance Evidence

You must produce evidence from your work that you can set up and maintain three displays and dismantle at least one display. Your assessor will observe you on at least two occasions, one of which must be the dismantling of a display.

The evidence must include checking the area and the completed display to ensure that it does not pose threats to the health and safety of staff and customers.

You show, in your performance, that

R1 you can set up, maintain and dismantle displays that are:

- to introduce new stock
- to increase sales of existing stock

Collecting the Evidence

- 1 When you plan assessment, look for occasions when you can be observed achieving this outcome at the same time that you are observed achieving other outcomes in this Unit.

Unit IL2/11 Display stock to specification to attract customer interest and promote sales (DNT0 1 Level 2)

Element IL2/11.3

Label displays of stock

You show that you can

- 1 check and clarify the requirements for labelling
- 2 label products correctly
- 3 check that the label information is accurate and legal
- 4 place labels so that they are clearly visible and legible and are positioned securely in the correct place
- 5 complete labelling within specified timescales

You understand

Why

K1 it is important to check the accuracy and legality of information on labels

How

K2 the positioning of information influences its effectiveness in promoting products

K3 to check the accuracy and legality of information on labels

What

K4 rights, duties and responsibilities apply, under relevant legislation such as The Sale of Goods Act

Unit IL2/11 Display stock to specification to attract customer interest and promote sales (DNT0 1 Level 2)

Element IL2/11.3

Label displays of stock

Performance Evidence

You must produce evidence from your work that you can label two displays of stock. Your assessor will observe you on each occasion.

You show, in your performance, that

R1 you check the following types of information:

- product information
- organisational information

R2 you attach labels:

- on products
- on displays

Collecting the Evidence

- 1 It is important that you show that you are able to consistently and accurately label stock. When planning your assessment with your assessor, you will need to consider the timescale over which evidence should be collected in order to show consistency.
- 2 When you plan assessment, look for occasions when you can be observed achieving this outcome at the same time that you are observed achieving other outcomes in this Unit.

Unit IL2/12 Produce documents using word processing software (ITNTO 202)

Element IL2/12.1	Retrieve and enter data to create and update files
Element IL2/12.2	Produce the required documents by manipulating data
Element IL2/12.3	Output the document to the required to destination

About this unit

It is envisaged that your evidence for this unit will normally show you have worked competently over a minimum period of six months

This unit is for anyone who is involved in producing documents to given formats using word processing software.. It is a unit in Option Group 2 – Activities – of the Information and Library Services Level 2 NVQ/SVQ.

It describes the actions involved with the operations of entering, processing and outputting data using Information Technology. It covers techniques for entering and manipulating data and outputting to various destinations.

You

- establish your customer's requirements
- retrieve and enter files and data
- produce various documents using word processing software
- manipulate text, numbers and graphics to produce documents to given formats to meet customer requirements
- identify the correct output device and select parameters to output requirements for your documents

Key words

Certain Key Words are listed and defined at the end of this Unit. You should use these definitions to clarify the meaning of these terms in the outcomes. The Key Words are:

Arithmetic facilities; Automated checking facilities; Customer; Document requirement; Documents; Electronic mail; Graphics data; Number data; Real Work; Realistic Working Environment; Real Working Environment; Selection device; Specialist devices

Your evidence for this unit may contribute towards evidence for achievement of the following Key and Core Skills

Core skills

Oral Communication Intermediate 1: Produce and respond to straightforward oral communication

Problem Solving (Planning and Organising) Intermediate 1: Plan, organise and complete a straightforward task

Using Information Technology Intermediate 2: Using an IT system effectively and responsibly to process a range of information

Working With Others Intermediate 1: Work with others in a group to complete a straightforward activity

Written Communication (Writing) Intermediate 2: Produce well-structured written communication

(continued)

Unit IL2/12 Produce documents using word processing software (ITNTO 202)

Key skills

Information Technology: 2.1 Search for and select information for two different purposes
2.2 Explore and develop information and derive new information for two different purposes

Problem Solving: 2.1 Identify a problem and come up with two options for solving it
2.2 Plan and try out at least one option for solving the problem, obtaining support and making changes to your plan when needed
2.3 Check if the problem has been solved by applying given methods, describe results and explain your approach to problem solving

Unit Keywords

These definitions and explanations illustrate how key words and phrases are used in this unit

Arithmetic facilities These may be, add, subtract, multiply, divide, on-line help.

Automated checking facilities Such as spell checking, language, grammar.

Customer The person or organisation on whose behalf the Information Technology solution is being used. The customer may be yourself.

Document requirement Specification of the content and style required.

Documents Documents could be, where pre-defined, letters, memos, reports, mail merges, web pages, orders, charts etc. These need not be finally produced as hard copy.

Electronic mail In this instance, E-mail and computerised faxing.

Graphics data These may be, bitmap, clipart, WordArt, AutoShapes charts.

Number data This is data to which arithmetic functions can be applied.

Real Work This is where the product or service produced is required and used by a third party. It can be paid or unpaid.

Realistic Working Environment An environment which reflects the expectations of industry and commerce by efficiently and effectively using currently acceptable Information Technology.

Real Working Environment A working environment, which has not been principally created for candidate training or assessment purposes.

Selection device The device used to select data, for example, mouse, pointer, touch screens.

Specialist devices The devices used to overcome disability when selecting data.

Unit IL2/12 Produce documents using word processing software (ITNTO 202)

Element IL2/12.1

Retrieve and enter data to create and update files

You show that you can...

- 1 you obtain any necessary authority to access files
- 2 you correctly locate and retrieve the data and graphics required by the customer
- 3 you correctly use input devices to effectively enter data
- 4 when necessary, you promptly seek guidance, from the relevant person(s)
- 5 data and graphics entered are accurate, complete and meet your customer's requirements
- 6 you minimise the occurrence of errors by effective use of available automated checking facilities
- 7 when necessary, you effectively use on-line help
- 8 you save files to preserve their integrity and to comply with your organisation's requirements

You understand

How to

- K1 interpret your customer's requirements
- K2 locate and retrieve data
- K3 select and use appropriate input device
- K4 save files
- K5 use the available software to meet requirements
- K6 effectively use automated checking facilities
- K7 use on-line help
- K8 follow your organisation's requirements when saving files

What

- K9 (who) the person(s) is/are to ask to gain authority to access files
- K10 the importance of meeting your customer's requirements is
- K11 are the limits of your own responsibility for data entry and updating
- K12 the selection and use of input devices is in R2 (overleaf)
- K13 the reasons are why access authority is required for certain files and data
- K14 the factors influencing the selection of data input device are
- K15 the importance is of checking data
- K16 facilities are available for automated checking
- K17 the different methods are of checking data
- K18 the importance is of conforming to your organisation's requirements

Unit IL2/12 Produce documents using word processing software (ITNTO 202)

Element IL2/12.1

Retrieve and enter data to create and update files

Evidence Requirements

You must produce evidence from your work that you retrieve and enter data to create and update files, over a period of time, observed by your assessor.

Your evidence shows that you can

R1 Retrieve and enter data in the form of:

- Number
- Text

R2 Use at least one of the following input devices:

- Audio
- Keyboard
- Specialist device

R3 ... and meet customers' requirements for:

- Layout
- Purpose
- Time

R4 and your organisation's requirements for:

- Frequency
- Location
- Naming convention

Collecting the Evidence

1 **Typical work activities:**

- retrieving files
- entering data
- updating and creating files correctly
- saving files

2 **Examples of Performance Evidence.** The following examples illustrate the types of evidence, arising from your daily work, which you could collect to prove your competence

- printouts detailing file locations
- printouts showing updated files
- observations of you working over a period of time correctly updating and saving data

3 Evidence from simulated activities is not acceptable for this outcome.

4 You may provide supplementary evidence if performance evidence is not available for performance criteria a, d & g. Examples of Supplementary Evidence include:

- answers to written or oral questions from your assessor (these questions and answers will be recorded by your assessor)

Written or spoken reports describing:

- how you identify files and data that require to be updated
- the measures you take to ensure that all data is checked consistently
- how you ensure that newly created files are saved using the organisation's requirements

Witness testimony

- statements from people who are able to comment on your work

Unit IL2/12 Produce documents using word processing software (ITNTO 202)***Element IL2/12.2****Produce the required documents by manipulating data**You show that you can...*

- 1 you accurately identify your customer's document requirements
- 2 where customer's document requirements are unclear you promptly clarify their text format and page layout requirements
- 3 you promptly raise any queries arising during the production of the document with the relevant person(s)
- 4 when necessary, you effectively use on-line help
- 5 you effectively use the software facilities provided to achieve the required text format and page layout
- 6 you effectively use text and graphical manipulating facilities to achieve the required document
- 7 you effectively use the arithmetic facilities of the software to achieve the required document
- 8 you produce a final product which is complete and meets customer requirements

You understand

How to:

- K1 interpret customer requirements to establish their document needs
- K2 use the software available to produce documents
- K3 use on-line help
- K4 effectively use the software functions for formatting documents
- K5 effectively use the software functions for page layout
- K6 effectively use the software functions for manipulating document content

What

- K7 your customer's requirements are for the document to be produced
- K8 the factors are influencing the choice of software facilities and functions to produce your customer's document requirement
- K9 the importance is of meeting customer requirements

Who

- K10 the person(s) is/are with whom to raise queries

Unit IL2/12 Produce documents using word processing software (ITNTO 202)

Element IL2/12.2

Produce the required documents by manipulating data

Evidence Requirements

You must produce evidence from your work that you produce the required documents by manipulating data, over a period of time, observed by your assessor. You must produce a minimum of six documents of which two must combine textual, numerical and graphical data.

Your evidence shows that:

- 1 you can use the following format features:
 - Bullet lists
 - Font
 - Paragraph style
 - Indentation
 - Justification
 - Line spacing
 - Number lists
 - Tables
 - Tabs
- 2 ... and page layout features:
 - Page size
 - Page orientation
 - Page numbering
 - Headers and Footers
 - Margins
- 3 you use these Text Manipulating facilities
 - Copy
 - Insert file
 - Move
 - Search and replace
 - Sort
- 4 .. and these Graphic Manipulation facilities:
 - Insert graphic
 - Position
 - Size

Collecting the Evidence

- 1 Examples of Performance Evidence
 - details of customer requirements
 - text documents
 - documents with text, numbers and graphics
 - numerical documents
 - graphical documents
 - demonstrating the effective and correct use of using software to produce documents

(continued)

Unit IL2/12 Produce documents using word processing software (ITNTO 202)

Element IL2/12.2

Produce the required documents by manipulating data

Collecting the Evidence (continued)

- 2 Typical work activities:
 - working with customers
 - establishing customer document requirements
 - producing documents
- 3 Evidence from simulated activities is not acceptable for this outcome
- 4 You may provide supplementary evidence where performance evidence is not available for performance criteria b, c & d. Examples of Supplementary Evidence include:
 - answers to written or oral questions from your assessor (these questions and answers will be recorded by your assessor)

Written or spoken reports describing:

- how you identified your customer's document requirements and the steps you took to ensure the correct software functions and facilities were used

Witness testimony:

- statements from people in a position to comment on your work

Unit IL2/12 Produce documents using word processing software (ITNTO 202)

Element IL2/12.3

Output the document to the required destination

You show that you can...

- 1 the selected document is complete and ready for output
- 2 the document output devices used are suitable for producing documents to meet customer requirements
- 3 the printer output parameters used meet output device and customer requirements
- 4 output to electronic devices is correctly addressed
- 5 the final document is complete and meets your customer's requirements
- 6 where necessary, your methods of outputting documents preserves confidentiality

You understand

How to

- K1 select the output device required
- K2 interpret instructions for using output devices
- K3 identify and set up parameters to meet output requirements and preserve confidentiality
- K4 use methods for checking output devices

What

- K5 the factors influencing your decision in choice of output device
- K6 your customer's requirements for document outputs
- K7 are the occasions when confidentiality should be preserved

Unit IL2/12 Produce documents using word processing software (ITNTO 202)

Element IL2/12.3

Output the document to the required destination

Evidence Requirements

You must produce evidence from your work that you output the document to the required destination, on a number of occasions, observed by your assessor.

Your evidence shows that:

- R1 Output devices are:
- Electronically stored for use by others
 - Electronic mail
 - Printer
- R2 Output parameters are:
- Hard copy
 - Number of copies
 - Page range
 - Paper size

Collecting the Evidence

- 1 Examples of Performance Evidence
 - details of customer requirements
 - hard copies of outputs
 - demonstrating setting up and using output devices
 - printouts from electronic output devices
- 2 Typical work activities:
 - printing documents
 - mailing documents
 - faxing documents
 - monitoring output parameters to meet customer output requirements
- 3 Evidence from simulated activities is not acceptable for this outcome
- 4 You may provide supplementary evidence where performance evidence is not available for performance criteria b & d. Examples of Supplementary Evidence include:
 - answers to written or oral questions from your assessor (these questions and answers will be recorded by your assessor)

Written or spoken reports describing:

 - the steps you consistently take to ensure the device and materials used meet your customer's needs
 - how you ensure the output device is correctly identified and the output parameters accessed to comply with output requirements

Witness testimony

 - statements from people who are able to comment on your work

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Assessment Guidance

Performance Evidence

An NVQ/SVQ is awarded when a person has achieved all the Units of Competence in the award. In this qualification, the candidate has to achieve a total of six Units. Candidates achieve Units when they bring forward evidence that meets the outcomes in the Unit. For example in Unit IL2/1 *Maintain the arrangement of material* there are two outcomes:

IL2/1.1 Sort and re-place material

IL2/1.2 Check the condition and arrangement of material

The evidence the candidate brings forward must be evidence of performance – what she or he can do, not just what he or she knows. The evidence required for each outcome is described alongside the outcome itself.

For example:

You show that you can...

IL2/1.1 Sort and re-place material

Performance Evidence

You must produce evidence from your work that you can sort and re-place material on two occasions.

As you can see, this states clearly what the candidate has to do to be judged competent in ‘sorting and replacing material’. It is called performance evidence simply because it shows what the individual is capable of achieving in a real work role.

In the example above, the specification goes on to describe the kind of evidence required:

You show in your performance that:

R1 you can sequence material either by classification or by subject grouping

R2 you can re-place at least one of the following types of material:

- printed material, such as books and journals
- recorded material, such as audio tapes, videos or CDs
- filmed material, such as microfiches or filmed images

R3 ...in the following types of storage:

- open storage, such as shelves or racks
- closed storage, such as drawers, cupboards or cabinets

What the assessor does with the evidence

The assessor judges and decides: that is, she/he

- **judges** each sample against the outcome;
- reviews all the evidence to **decide** whether the candidate meets the outcome.

Each sample must be judged against **all** the criteria in an outcome. Each criterion is simply an aspect of performance which is critical to performing competently. Taken together, the criteria describe the

difference between a competent performance and one that is not. So in IL2/1.1, the assessor will judge the way the candidate sorts and re-replaces material. In this case, the assessor will have to see the candidate's work. This includes observing the candidate. The assessor must decide (with the candidate) whether it will be necessary to observe performance on every occasion. What is essential is that the evidence for each sample **must** meet **all** the criteria in the outcome. In the example, these are:

You show that you can

- 1 sort and re-place material accurately and with minimum disruption to users
- 2 re-place material tidily and in its correct place
- 3 handle and position material safely
- 4 note and correct promptly any errors in sequencing the material
- 5 get appropriate assistance to resolve difficulties you have in re-placing material

The assessor looks at the evidence which the candidate produces, and decides whether it meets **all** these criteria.

When observing a candidate at work, the assessor looks at what the candidate does and checks that the performance meets the criteria.

When the assessor is looking at evidence in written form (such as a report or a log of activity kept by the candidate), exactly the same criteria are used to judge it. This means that good communication and planning is needed between the assessor and the candidate, to ensure that written evidence is presented in a way which enables the assessor to test it against the criteria without having to ask for more information.

When judging each sample, the assessor is deciding whether the evidence:

- is authentic ie actually produced by the candidate;
- meets all the criteria;
- relates to one or more of the contexts defined in the range statements;
- confirms that the candidate has the required underpinning knowledge (see Knowledge Evidence below).

When the assessor **makes an assessment decision** about the candidate's competence, she/he examines all the evidence available (that is, all the samples) to determine:

- whether the evidence, as a whole, covers all the **range statements** in each outcome;
- whether the samples indicate **consistency** in competent performance;
- whether there are **enough samples** of evidence on which to base an inference of competence.

The **range statements** describe different working conditions in which the candidate is expected to achieve the outcome. You can tell what these are because they are described in the performance evidence as R1, R2, etc. These say whether the candidate must produce performance evidence for each item listed, or for a selection. If all aspects of the range are not covered in performance evidence, they should be met by other means, eg questioning, professional discussion or simulation (see page 115).

In the example above, each candidate has to show that

R2 you can re-place at least one of the following types of material:

- printed material, such as books and journals
- recorded material, such as audio tapes, videos or CDs
- filmed material, such as microfiches or filmed images

This means that the candidate has to produce one sample of performance evidence.

However, the candidate must also show that she/he can deal with all types of material. This can be done by showing that she/he knows how to deal with them – that is, that they have the underpinning knowledge needed.

So, when planning evidence collection, the assessor and candidate should agree which material the candidate deals with most frequently at work and select the two which will appear in the performance evidence. The assessor can then decide how to check that the candidate understands how to identify the other types – usually by questioning the candidate.

If in doubt about this, the assessor should ask their internal verifier or seek the advice of the Awarding Body.

Consistency means that the individual is likely to achieve the outcome in their work role in the different contexts defined by the range and over time. The assessor must judge how long a time period is enough to be confident that the candidate can perform reliably to the outcome. The statement of what evidence is required refers to this:

You must produce evidence from your work that you can sort and re-place material on two occasions.

The assessor must, therefore, decide what will be a reasonable period of time. To decide this, the assessor must know about the candidate's job, and the circumstances in which the candidate works. Four principles should guide the assessor's judgement of what constitutes a reasonable period of time:

- 1 the time period should be long enough for the candidate to produce the samples of evidence required, across the range (see 1 above);
- 2 the time period should be linked to the complexity of the candidate's work. If it is highly repetitive and simple (such as filing), it is likely that a short time period will be enough. If it is more complex and non-routine, it may take some time before the assessor can safely infer that the candidate can perform consistently;
- 3 the time period should not be so long that the candidate is discouraged from collecting the evidence, or demotivated because of what she/he may see as unnecessary delay before being judged competent;
- 4 all candidates must be treated equally and impartially. It may be necessary for some candidates to take longer to produce the required evidence than others (for example, because of working conditions or the specific nature of the candidate's job), but these differences should be kept to a minimum, and it must be clear to the candidate that the reasons are related to consistency of performance. Assessors are expected to use their own experience of the work the candidate does to decide this. They are also expected to be disciplined in avoiding unfair treatment of candidates, or in letting their own pre-conceptions lead them to demand either too much or too little evidence.

The assessor decides that **enough evidence** has been collected when he/she can make a **safe inference** of competence. 'Safe' does not mean 'over-cautious'. It simply means that it is a judgement which other assessors, the Internal Verifier and the External Verifier are likely to agree with, or which can be successfully defended (by reference to the evidence) if challenged. Once again, assessors are expected to avoid personal bias in judging whether evidence is sufficient. They are also expected to be consistent when making these judgements for different candidates.

Collecting the Evidence

When planning assessments, both the assessor and the candidate should use the Performance Evidence shown in this publication to identify opportunities to collect evidence which arises naturally in the candidate's job. The best of these can be used to observe the candidate achieving the outcome.

If it is not possible to collect all the required samples by observation, the assessor must consider how

NVQ Information and Library Services Level 2 – Candidate logbook

else the candidate should produce the evidence. There are a number of different ways of doing this: for example:-

- 1 the candidate may keep a diary or log describing work related to the outcome;
- 2 evidence can be used from those who have observed the candidate achieving the outcome – this is known as witness testimony;
- 3 the candidate may be able to bring forward relevant evidence from recent past experience.

Sometimes *product evidence* is required – that is evidence in the form of things the candidate has produced in the course of their work. For example in IL2/1.1, the evidence may take the form of the records produced by the candidate.

Matching the Evidence to the Criteria

It is not appropriate to collect evidence against individual criteria. Nor is it efficient, because it can lead to producing more evidence than is needed, which can demoralise candidates and over-burden assessors.

It will happen, occasionally, that, when the assessor observes the candidate, the performance will not produce evidence which matches all the criteria. As far as possible, these circumstances should be avoided by good assessment planning.

For example, in IL2/11.1 (Plan to set up displays to specification), criterion 1 is:

identify the purpose and requirements of the display from the available information

This may have happened before the assessor observes the candidate. Good planning will spot instances like this, and the candidate should be asked to have evidence ready that they have met this requirement.

Sometimes a criterion describes a situation which does not always arise. In IL2/1.1, (sort and re-place material) criteria 4 and 5 are:

(you) note and promptly correct any errors in sequencing the material
(you) get appropriate assistance to resolve difficulties you have in re-placing material

Neither may occur when the candidate is observed by the assessor. When this happens, the assessor will still need evidence that the candidate's performance meets the requirement. This evidence can be produced in different ways: for example:

- by asking the candidate what they would do, if the circumstance arose (What if... questions);
- by collecting witness testimony;
- by using evidence from the candidate's recent past experience.

Sometimes, the circumstances of a candidate's job are such that not all the samples of evidence can be collected in the normal working environment. For examples, the pattern of a candidate's work may be such that it will take too long to collect the evidence from the job itself: or it may be that the candidate does not have opportunities to achieve the outcome in their normal job.

Other ways in which evidence can be collected in these circumstances include:

- through arranging a secondment;
- through specially arranged project work;
- through bringing forward evidence from past experience;
- through a simulation – but see the section on simulation below.

These should be used in exceptional circumstances, and assessors should discuss the use with the internal verifier.

Types of performance evidence

Performance evidence can be:

- naturally occurring – that is, evidence produced in the normal course of doing the job;
- simulated – that is, from contexts specially designed to enable the candidate's performance to be assessed;
- previous achievements – that is, the candidate may be able to bring forward evidence from previous work experience to show that they are still competent to the outcome – see *Prior Achievement* below.

Using simulations

Normally performance evidence should be collected from everyday work performance. Evidence of this sort is usually of better quality and more reliable. It is also more cost-effective to collect evidence that arises naturally from work in this way. However, it is not always possible or feasible to do this. It is likely that some simulation may be needed, when:

- it may take too long to wait for the evidence to arise: eg it may be an aspect of performance which occurs infrequently. An example of this may be evidence of how to deal with emergencies;
- the context may not permit the evidence to be collected, or the performance to be observed: eg it may be impractical or counter-productive to observe someone seeking feedback on their work performance.

Be warned, however! The term 'simulation' is used in different ways by different people. Six different methods are shown on the next page. When people use the term 'simulation', they may mean any of these.

1 Rehearsals

A complex simulation of a complete working environment. Often used in the learning process, but may also be used for assessment. In rehearsals for assessment purposes, all the critical aspects of the real environment **must** be present – equipment, products, locations, people, etc. Often used to observe performance, but there may be product outcomes as well.

2 Role plays

A representation of an interaction in which one or more people 'act' out parts in order to stimulate a response from the person being assessed. The 'actor' usually works from a script. Sometimes (usually) the assessor knows that the other(s) are playing a role. Sometimes (as with mystery shoppers) they may not know. Outcomes and processes may be observed or recorded. **Role plays are not acceptable forms of simulation for assessing candidates' performance against the outcomes in this qualification.**

3 Work Project

A complex activity usually involving a number of associated outcomes and processes. Projects normally include data collection, investigation, analysis, calculation, interpretation, synthesis, presentation of findings and formatting of written reports. They may also be referred to as assignments.

4 Off-Job Project

The same as 3, except that the project is done away from the working environment, and may be based on hypothetical data and information.

5 Job Placement

Temporary placement in another work role with the same employer, and which is not part of the individual's normal job. Can be used to assess any aspect of competence.

6 Work Placement

Temporary placement in a work environment in which the candidate is not an employee.

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Generally, you should ask yourself the following questions before considering producing evidence from simulations:

- does the individual's workplace offer no opportunities to collect the evidence you need for a whole unit or outcome?
- are there limited opportunities to collect evidence against all the aspects defined in the performance evidence?
- is it unethical, too dangerous or too time-consuming to collect evidence in the workplace?

If the answers are 'Yes', then you should consider using simulations, starting with looking at the possibilities of job rotation or work placement.

Prior Achievement

Evidence of prior achievement can be used when it can be shown to support a judgement that the candidate can still achieve the outcomes. So, the assessor must be satisfied that evidence of prior achievement is sufficiently reliable to justify saying that the candidate is **currently** competent. Please see the Employment NTO Unit D36 (*Advise and Support Candidates to Identify Prior Achievement*) for the outcomes which apply to helping candidates to produce such evidence.

Types of evidence

Performance evidence can be what the individual actually produces, or the way the individual achieves the outcome. One is called **product evidence** and the other **process evidence**.

Product evidence is tangible – you can look at it, feel it, taste it (in the case of food!). Product evidence might be an assembled display, a report or a written risk assessment. Products can be inspected and the candidate can be asked questions about them.

Process evidence describes the way the candidate has achieved an outcome – how they went about it. This may be, for example, the way the candidate deals with users, or the way she/he works with others. This usually means observing the candidate in action. On balance most of the evidence needed in Information and Library Services is process evidence.

Evidence collection methods

Performance evidence may be collected in different ways – by observation of the candidate's performance, by examining what the candidate produces (such as documents) and, with simulations, by skill tests, competence tests, projects and assignments. When used to collect performance evidence, observations of performance might come directly from being there, or by recording the performance, for example on video or audiotape. However evidence is collected, please remember that more than one method should be used, in order to assure the quality of the evidence and to make reliable assessment decisions.

It makes sense to plan evidence collection so that what the candidate does, in the normal course of their job, can be related to different outcomes and units. Care, however, must be taken not to over-use evidence – ie to 'stretch' a piece of evidence so that it is made to 'fit' a variety of outcomes. If this happens, the assessment decisions are likely to be challenged by the verifiers – and, of course, the competence of the individual will be in doubt.

The really important judgement the assessor and candidate must make is to decide what outcome or outcomes actually apply to the daily activities of the job. These should be things to concentrate on when planning evidence collection and assessment and when monitoring the candidate's progress.

So look for opportunities in the candidate's job when evidence can be collected against several outcomes at the same time – but don't do this at the expense of good evidence – that is, evidence which clearly relates to an outcome and which is reliable and valid.

One way of planning which methods to use is to use the following procedure:

- 1 Go through the Performance Evidence requirements with the candidate, and ask the candidate to identify when, in their work, they do what the performance evidence requires.
- 2 Draw up (or get the candidate to draw up) a list of the opportunities for generating evidence at work identified in this way. This may well show that, at certain times, or when performing certain tasks, the candidate can generate evidence which applies to most or all the outcomes in a unit of competence, or, indeed, to several outcomes in different units. This will make evidence collection efficient, and make the best use of the assessor's time.

Use the list to decide when the best assessment opportunities arise, and use these to agree the assessment schedule with the candidate.

The list you produce could look something like this:

Opportunity	Evidence Generated	Relevant to:								
		1.1	1.2	1.3	2.1	2.2	3.1	3.2	3.3	Etc.
1										
2										
3										
4										

Knowledge evidence

Being able to achieve an outcome means putting the knowledge you have to work. Along with each outcome, there is a description of the knowledge each person should use if they are to perform competently. This is shown in the **Knowledge Evidence** section.

It should not be necessary to test all the candidate's knowledge separately. The performance evidence should show that the candidate knows what she or he is doing. When this is not the case, or if the assessor is not convinced from the performance evidence, it may be necessary to check the individual's knowledge separately.

The Awarding Bodies should give guidance on how best to handle this. The important principle is that the candidate's competence must be judged against the available performance evidence. Knowledge evidence is useful when deciding the quality of performance evidence, but must not be used in isolation to judge competence or as an alternative to performance evidence.

Equality of opportunity

Equality of access to fair and valid assessment is a guarantee for all candidates for NVQ/SVQ/Units. This may mean making arrangements for candidates with special assessment needs – for example, for those working at a distance from the assessment centre. Candidates' work patterns should not become a barrier to assessment, the organisation of which may have to be flexible. In the same way, special arrangements may be necessary for candidates with a disability. For example, a candidate who is unable, through disability, to produce oral or written evidence, must be allowed to use the method they normally use as a substitute for the required form of communication.

Steps in the assessment process

Assessment is the last step in a process. It is important to be clear what all the steps are:

- 1 PLAN EVIDENCE COLLECTION AND ASSESSMENT**
- 2 COLLECT EVIDENCE OF COMPETENT PERFORMANCE**

3 JUDGE EVIDENCE

4 GIVE FEEDBACK TO THE CANDIDATE

5 DETERMINE WHETHER SUFFICIENT EVIDENCE HAS BEEN PRESENTED

[repeat 3 and 4 until sufficient evidence is available. Then...]

6 MAKE AN ASSESSMENT DECISION AND GIVE FEEDBACK TO THE CANDIDATE

Glossary

Approved centre – an organisation inspected by City & Guilds and deemed to have the trained staff and resources to make assessment arrangements for particular NVQs.

APL – the Assessment of Prior Learning. The facility for an individual to receive credit for previously acquired (and still current) competence. Also known as APA (Assessment of Prior Achievement).

Assessor – person accountable to the external verifier (through the internal verifier) who is both experienced and qualified/or working towards qualifications in assessing candidates. Assessor skills include observation, evaluation, making judgements about individual performance. Assessors may be based in the workplace, in an approved centre such as a college, or be peripatetic, visiting candidates in a variety of situations.

Awarding body – an organisation recognised by the Qualifications and Curriculum Authority (QCA) for the purpose of awarding National Vocational Qualifications (NVQs) eg **City & Guilds**.

Candidate – employee or student/trainee, registered with City & Guilds, who wishes to be assessed in order to gain a qualification.

Certificate of unit credit – document issued by City & Guilds listing units achieved.

Competence – an assessment based on the candidate's ability to perform a task to a defined standard specified in the national occupational standards.

CPD – continuing professional development.

Evidence – the means by which an external verifier can be satisfied that an individual has been properly assessed, usually a combination of completed/endorsed witness statements, and assessments by a qualified assessor with additional documentation collected in a portfolio of evidence.

External verifier – person accountable to City & Guilds who effects quality assurance by monitoring and advising internal verifiers and assessors.

Internal verifier – person accountable to the external verifier and City & Guilds who is based in the approved centre and who co-ordinates assessment arrangements and monitors assessor standards.

Portfolio – a structured collection of evidence from several sources, gathered together and referenced to the national occupational standards, in which a candidate's achievements are recorded.

National Vocational Qualification – a qualification recognised by the Qualifications and Curriculum Authority (QCA) as being relevant to the need of industry.

Realistic work environment (RWE) – a model environment, having an acceptable level of appropriate equipment and operating continually to professional standards. It should provide the opportunity for candidate assessment under conditions approximating as closely as possible to the workplace, under the control of a qualified assessor.

Work-based assessment – assessment of candidates' performance on realistic tasks such as would be carried out in the workplace. May take place in the workplace or under conditions which approximate as far as can be practically arscoped to the workplace (see RWE).

Workplace assessment – assessment of candidates' performance on real work activities in a real work situation. Assessment may be completed by either a qualified workplace assessor (the candidate's manager or supervisor) or a qualified visiting assessor (an assessor employed by an approved centre)

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