QUALIFICATION HANDBOOK

7384 Level 3 Certificate / Diploma in Retail Skills Handbook (Visual Merchandising)

December 2011 Version 1.0

City& Guilds

Qualification at a glance

Subject area	Retail Skills (QCF)
City & Guilds number	7384
Age group approved	All
Entry requirements	None
Assessment	Portfolio of evidence
Fast track	Available from 7536
Support materials	Centre handbook Candidate logbook
Registration and certification	Consult the Walled Garden/Online Catalogue for last dates

Title and level	City & Guilds number	Accreditation number
Level 3 Certificate in Retail Skills (Visual Merchandising)	7384-32	600/3961/9
Level 3 Diploma in Retail Skills (Visual Merchandising)	7384-35	600/4062/2

Contents

1   Introduction

This document tells you what you need to do to deliver the qualifications:

Area	Description
Who is are the qualifications for?	These level 3 qualifications are for candidates who have worked in the retail industry for some time – they will have plenty of experience, and their work might involve supervising others or managing resources. The qualifications are for candidates who want to develop their skills further, perhaps to move into a management role.
What do the qualifications cover?	These qualifications allow candidates to learn, develop and practise the skills required for employment and/or career progression in visual merchandising for retail. Units in the qualification cover all areas of visual merchandising including dressing displays, positioning signage, making and managing props and managing budgets.
What opportunities for progression are there?	They allow candidates to progress into employment or to the following City & Guilds qualifications: • Level 3 Certificate / Diploma in Retail Skills (Management) • Level 3 Certificate / Diploma in Retail Skills (Sales Professional)

Structure

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

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

Level 3 Certificate in Retail Skills (Visual Merchandising)

UAN	Unit level	City & Guilds unit number	Unit title	Group	Credit Value	GLH
Mandatory						
H/503/5729	3	316	Work effectively and support others in a retail organisation (E.08)	A	10	50
Optional						
D/503/5695	2	225	Follow guidelines for planning and preparing visual merchandising displays (C.18)	C	5	22
H/503/5696	2	226	Dress visual merchandising displays to attract customers (C.19)	C	7	35
K/503/5697	2	227	Order and position signage and graphics for visual merchandising displays (C.20)	C	3	15
M/503/5698	2	228	Dismantle and store props and graphics from visual merchandising displays (C.21)	C	3	15
T/503/5699	2	229	Make props and decorate fixtures and panels for visual merchandising displays (C.22)	C	10	45
D/503/5700	2	230	Assemble visual merchandising displays (C.23)	C	4	20
H/503/5701	3	308	Choose merchandise to feature in visual merchandising displays (C.24)	B	6	27
K/503/5702	3	309	Manage the use of signage and graphics in visual merchandising displays (C.25)	B	7	31
M/503/5703	3	310	Evaluate the effectiveness of visual merchandising displays (C.26)	B	9	46
T/503/5704	3	311	Manage budgets for visual merchandising projects (C.27)	B	10	46
A/503/5705	3	312	Contribute to improving a retail organisation's visual merchandising policy (C.28)	B	8	36
F/503/5706	3	313	Design visual merchandising display layouts (C.29)	B	10	46

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

- 10 credits must come from the mandatory unit in group A
- A minimum of 32 credits must come from the level 3 optional units in group B
- A maximum of 11 credits can come from the level 2 and 3 optional units in group C

Level 3 Diploma in Retail Skills (Visual Merchandising)

UAN	Unit level	City & Guilds unit number	Unit title	Group	Credit Value	GLH
Mandatory						
H/503/5729	3	316	Work effectively and support others in a retail organisation (E.08)	A	10	50
Optional						
D/503/5695	2	225	Follow guidelines for planning and preparing visual merchandising displays (C.18)	C	5	22
H/503/5696	2	226	Dress visual merchandising displays to attract customers (C.19)	C	7	35
K/503/5697	2	227	Order and position signage and graphics for visual merchandising displays (C.20)	C	3	15
M/503/5698	2	228	Dismantle and store props and graphics from visual merchandising displays (C.21)	C	3	15
T/503/5699	2	229	Make props and decorate fixtures and panels for visual merchandising displays (C.22)	C	10	45
D/503/5700	2	230	Assemble visual merchandising displays (C.23)	C	4	20
D/503/5681	3	304	Manage staff to receive goods in a retail environment (B.37)	C	5	24
H/503/5682	3	305	Organise and monitor the storage of stock in a retail environment (B.38)	C	6	27
H/503/5701	3	308	Choose merchandise to feature in visual merchandising displays (C.24)	B	6	27
K/503/5702	3	309	Manage the use of signage and graphics in visual merchandising displays (C.25)	B	7	31
M/503/5703	3	310	Evaluate the effectiveness of visual merchandising displays (C.26)	B	9	46
T/503/5704	3	311	Manage budgets for visual merchandising projects (C.27)	B	10	46
A/503/5705	3	312	Contribute to improving a retail organisation's visual merchandising policy (C.28)	B	8	36
F/503/5706	3	313	Design visual merchandising display layouts (C.29)	B	10	46
Y/503/5731	3	317	Deputise for the leader of a retail team (E.09)	C	11	55
D/503/5731	3	318	Contribute to the continuous improvement of retail operations within own area of responsibility (E.10)	C	10	47

2 Centre requirements

Approval

If your Centre is approved to offer the qualification 7536-33/36 Level 3 Certificate/Diploma in Retail Skills (Visual Merchandising) you can apply for the new 7384-32/35 Level 3 Certificate/Diploma in Retail Skills (Visual Merchandising) approval using the **fast track approval form**, available from the City & Guilds website.

Centres should use the fast track form if:
- there have been no changes to the way the qualifications are delivered, and
- they meet all of the approval criteria in the fast track form guidance notes.

Fast track approval is available for 12 months from the launch of the qualification. After 12 months, the Centre will have to go through the standard Qualification Approval Process. The centre is responsible for checking that fast track approval is still current at the time of application.

To offer these qualifications, new centres will need to gain both centre and qualification approval. Please refer to the *Centre Manual - Supporting Customer Excellence* for further information.

Centre staff should familiarise themselves with the structure, content and assessment requirements of the qualifications before designing a course programme.

Resource requirements

Centre staffing

Staff delivering these qualifications must be able to demonstrate that they meet the following occupational expertise requirements. They should:
- be occupationally competent or technically knowledgeable in the area[s] for which they are delivering training and/or have experience of providing training. This knowledge must be to the same level as the training being delivered
- have recent relevant experience in the specific area they will be assessing
- have credible experience of providing training.

See also page 15 for details from the assessment strategy on the role of supervisors and managers in the assessment process.

Centre staff may undertake more than one role, eg tutor and assessor or internal verifier, but cannot internally verify their own assessments.

Candidate entry requirements

City & Guilds does not set entry requirements for these qualifications. However, centres must ensure that candidates have the potential and opportunity to gain the qualifications successfully.

Age restrictions

City & Guilds cannot accept any registrations for candidates under 16 as these qualifications are not approved for under 16s.

3 Delivering the qualification

Initial assessment and induction

An initial assessment of each candidate should be made before the start of their programme to identify:

- if the candidate has any specific training needs,
- support and guidance they may need when working towards their qualifications.
- any units they have already completed, or credit they have accumulated which is relevant to the qualifications.
- the appropriate type and level of qualification.

We recommend that centres provide an induction programme so the candidate fully understands the requirements of the qualification[s], their responsibilities as a candidate, and the responsibilities of the centre. This information can be recorded on a learning contract.

Support materials

The following resources are available for these qualifications:

Description	How to access
Fast track approval form	www.cityandguilds.com
Candidate logbook	www.cityandguilds.com
SmartScreen	www.smartscreen.co.uk

Recording documents

Candidates and centres may decide to use a paper-based or electronic method of recording evidence.

City & Guilds endorses several ePortfolio systems, including our own, **Learning Assistant**, an easy-to-use and secure online tool to support and evidence learners' progress towards achieving qualifications. Further details are available at: **www.cityandguilds.com/eportfolios**.

City & Guilds has developed a set of *Recording forms* including examples of completed forms, for new and existing centres to use as appropriate. *Recording forms* are available on the City & Guilds website.

Although new centres are expected to use these forms, centres may devise or customise alternative forms, which must be approved for use by the external verifier, before they are used by candidates and assessors at the centre. Amendable (MS Word) versions of the forms are available on the City & Guilds website.

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4 Assessment

Assessment of the qualification

Candidates must:

- have a completed portfolio of evidence for each unit

City & Guilds discourages the inappropriate use of competence-based qualifications by organisations that do not assess candidates in a working environment. Competence-based qualifications are suitable only for learners who are in some form of employment in the sector, or, in a limited set of contexts, are being prepared for work and will be assessed in a realistic working environment.

City & Guilds has established criteria to ensure that simulation is not used as the sole form of evidence for any unit of a competence-based qualification, except where allowed for specific units that meet the criteria set out in the assessment strategy.

Evidence towards a competence-based qualification should come from the workplace except where simulation is expressly allowed in the evidence requirements for a particular unit. Workplace evidence may be gathered in the context of full, part-time, casual or voluntary employment. Assessment may be undertaken in a 'work placement' (i.e. fulltime students placed into a working environment for a day per week) although supporting evidence from a supervisor or manager, associated with some form of work activity, must supplement the assessment process.

Evidence requirements

Units may be assessed through a number of different sources and forms, which must meet the requirements of assessment criteria, which may include:

Naturalistic observation of workplace activities: Assessors must provide information about the context of the assessment.

Products: Such as reports, letters, e-mails, memos, printouts, etc, are also valuable items of performance evidence. Assessors are encouraged to assess work products in situ and record the location of evidence within their assessment records. Assessment centres using 'paperless portfolios' should first discuss their approach to assessment with their awarding organisation.

Expert witness: Can be used to address any gaps in the technical and occupational competence of assessors, and also for confidential or sensitive activities that are not appropriate for assessor observation. Expert witnesses are identified and trained by the centre.

Witness testimony: Can provide valuable evidence of candidate competence. In line with established principles, witness testimony must be:

- a clear, authentic statement indicating how the learner carries out their job
- dated, signed and include the job title of the witness.

Candidate reports (feedback): Oral or written reports from the candidate which involve descriptions of activities and processes and some self-assessment, e.g. a work diary.

Reflective accounts: A reflective account is usually a write up of how a candidate has carried out part of their job, recording events that actually happened. Where possible, the account should state why the candidate took the actions they did.

Professional discussion: Professional discussion is a single, or series of, structured, planned and in-depth discussion(s) which can be recorded electronically or manually in paper, computer, audio or video files. Professional discussions can be used to support observation reports, examination of
work products and knowledge questionnaires.

Verbal / written questions: Also includes questionnaires; work based tasks; reflective accounts; case studies; professional discussion; and, feedback reports. As assessment by observation and examination of work products usually results in inferred knowledge. Questions should only be asked to fill gaps where knowledge is not explicit. This style of assessment still requires the assessor to confirm how knowledge and understanding has been addressed but avoids over assessment of the candidate.

Projects: An extended piece of practical and / or written work involving planning and research, generally presented as a report.

Assignments: May be practical or written tasks given to learners which test skills, knowledge or understanding, or combinations of all three.

Case studies: An effective case study report should:

- clearly identify the core problem(s)
- analyse the issues underlying the problem
- discuss and justify alternative solutions using theory / experience
- present feasible recommendations
- be presented in an appropriate format.

Audio / video recordings: May be used to support observation reports, examination of work products and knowledge questionnaires.

Simulation / role play: A task-based function where there are clear goals which need to be achieved and the outcomes are evaluated in a 'real-work environment.

This list is illustrative of the options available to provide evidence in support of achieving the assessment criteria of a unit. The most

appropriate forms of evidence should be selected for each unit or part of a unit.

Time constraints

The following must be applied to the assessment of this qualification:

- Candidates must finish their assessment within their period of registration.

Assessment strategy

The following is taken from the retail sector's assessment strategy as provided by Skillsmart retail.

The use and application of simulation

In broad terms, the retail sector holds the view that simulation is a practical and effective tool for establishing skill and understanding, where naturally occurring evidence of competence is unavailable or infrequent. However the sector feels that there is very little that can be assessed by simulation with the exception of:

- some aspects of Health & Safety and Security, and

- some basic functions that do not involve interaction with customers.

Use of simulation as an assessment method

Assessment for competence-based units must always be carried out in a retail environment except where a Realistic Working Environment is permitted for simulation. Simulation is allowed only where:

- the assessment criteria require the learner to respond to an emergency;

- a unit covers a limited selection of basic functions which need not involve interacting with customers;

- a unit originates from another SSC or SSB and the originator expressly allows simulation to be used for that unit.

NB - A list of those units for which simulation is allowed are provided in Appendix 1 and 2.

Evidence generated from simulated activities will not be acceptable for any other unit.

Definition of a Realistic Working Environment (RWE)

Where simulation is used the sector requires that:

- Simulation must be undertaken in a Realistic Working Environment

A Realistic Working Environment (for the purpose of simulated work activities) is regarded as one that replicates a real working environment. For example, a college shop that operates on a commercial basis (i.e. it has a profit and loss account) is acceptable for retail environments but a shop laid out in a classroom environment is not. However, in order to prevent any barriers to achievement, simulated activity may be used for assessment purposes within a real working environment.

(See Evidence Requirements section for further details)

The role and competence of assessors, expert witnesses and verifiers

A wide variety of factors affect the participation of organisations and take-up by individuals of competence-based qualifications. These issues relate to other matters as well as the quality of an assessment process but are central to the way assessment is managed. To this end, Skillsmart Retail requires that the following conditions be fulfilled.

The role of supervisors and managers in the assessment process

Wherever possible, assessment should be conducted by supervisors and/or managers in a workplace environment. Where the skill or capability of these individuals is inadequate to deliver the requirements of the organisation or the quality infrastructure, services external to the work unit or organisation may be introduced (peripatetic assessors). If the candidate is employed in the retail sector, in no circumstances may a competence-based qualification for the retail sector be delivered without the involvement of the candidate's line manager or the owner/manager to confirm the candidate's competence.

Where in-store line managers carry out the assessment or internal verification roles, retail stores with the agreement of their Awarding Organisation may choose between:

a)achieving the appropriate regulatory authority approved qualifications for assessment and internal verification

OR

b)demonstrating that training and development activity undertaken by the employer to prepare, validate and review these assessment/verification roles, maps 100% to the National Occupational Standards on which these qualifications are based. The mapping process **must be agreed** by City & Guilds as providing the equivalent level of rigour and robustness as the achievement of the qualification.

The alternative option described in (b) above, which waives the need for the regulatory approved units in the retail sector, must be applied on an 'organisation by organisation' and 'qualification by qualification' basis. **Prospective organisations must be able to confirm that their in-house practices conform to the requirements of the NOS in association with City & Guilds.**

The role of peripatetic assessors and internal verifiers in the assessment process

Peripatetic assessors and internal verifiers must hold or be working towards the appropriate regulatory authority approved qualifications for assessment and internal verification.

The services offered by the peripatetic assessor must complement the activity of a line manager or owner/manager and the competence of a

candidate employed in the retail sector may not be confirmed without the participation of a line manager or owner/manager in the process. It is also requested that specific reference be made to auditing this provision, within external verification processes.

The role of expert witnesses in the assessment process
There are a number of specialist sub-sectors in retail. Consequently the sector has competence-based units relating to specialisms such as bakery, beauty consultancy and visual merchandising. In many cases assessors will not have the requisite experience of these specialist areas. In these instances the assessor **must use** an expert witness to provide evidence in confirming to the candidate's competence.

An expert witness is an experienced peer of the candidate, or the candidate's line manager. The expert witness is not consulted as a professional assessor, but as someone who is expert in the occupation to be assessed. The assessor will make the final judgement.

A list is appended of those units for which expert witness testimony is required, should the assessor lack the necessary occupational competence.

Occupational competence of expert witnesses
Expert witnesses can be drawn from a wide range of people who can attest to performance in the workplace, including line managers and experienced colleagues from inside the candidate's organisation. Skillsmart Retail requires that expert witnesses have proven practical experience and knowledge relating to the content of the unit being assessed.

It is unlikely that someone could become an expert in their entire job role in less than six to twelve months of being employed in the retail sector. They could, however, very quickly become an expert in the content of a single unit if this was the focus of their job role. The assessor should make a judgement as to the level of expertise held by a potential expert witness and, where necessary, confirm this with a member of the store management team.

Occupational competence of assessors
Assessors in the retail sector should have an in-depth knowledge of, and be competent in performing, the occupational requirements of the generic competence-based units as well as any specialist units for which they do not use expert witness testimony.

This competence will have been acquired either in direct employment in the occupational role to which the unit relates, or in employment as a manager, supervisor or in-house trainer of employees carrying out the role.

It is unlikely that occupational competence will have been achieved in less than twelve months of employment as a retail assistant, or less than six months in a managerial position, but individuals with less experience could be considered as assessors if sufficiently occupationally competent.

Occupational competence of verifiers

Internal Verifiers (or equivalent quality assurance experts) in the retail sector must have a current understanding of the structure, content and occupational requirements of the units that they are internally verifying. This understanding will have been acquired while working directly within the relevant occupational area in either an operational or a support function.

The level of understanding should be sufficient to allow the Internal Verifier to judge whether the assessor has fully assessed learners against all the assessment criteria in the unit.

It is unlikely that a person could have gained this level of understanding in less than six months of being employed in the retail sector, but individuals with less experience could be considered as Internal Verifiers if they have the required level of understanding.

Continuing professional development of assessors and verifiers

All assessors and verifiers, if not currently employed within a retail organisation, will need to prove they have a current working knowledge of the sector they are assessing or verifying. This can be demonstrated by maintaining records of evidence from occupational updating activities such as:

- Internal or external work experience
- Internal or external work shadowing opportunities
- Other relevant CPD activities with the prior approval of City & Guilds

Note: Retailers who have chosen not to use the regulatory authority approved qualifications for assessment and internal verification should be encouraged to offer the qualifications as CPD where the willingness by the employer to support this additional activity becomes known to City & Guilds.

The full assessment strategy is available to download from Skillsmart retail website www.skillsmartretail.com

Recognition of prior learning (RPL)

Recognition of prior learning means using a person's previous experience or qualifications which have already been achieved to contribute to a new qualification. RPL is allowed and is not sector specific.

5   Units

Availability of units

Below is a list of the learning outcomes for all the units.

Structure of units

These units each have the following:
- City & Guilds reference number
- unit accreditation number
- title
- level
- credit value
- unit aim
- relationship to NOS, other qualifications and frameworks
- endorsement by a sector or other appropriate body
- information on assessment
- learning outcomes which are comprised of a number of assessment criteria.

Unit 225   Follow guidelines for planning and preparing visual merchandising displays (C.18)

UAN:	D/503/5695
Level:	Level 2
Credit value:	5
GLH:	22
Relationship to NOS:	SSR.C230, SSR.C231
Endorsement by a sector or regulatory body:	This unit is endorsed by Skillsmart Retail, the Sector Skills Council for Retail.
Aim:	The purpose of this unit is to assess the occupational competence of individuals who are responsible for planning and preparing visual merchandising displays from guidelines provided in design briefs

Learning outcome
The learner will:
1. Understand the importance of visual merchandising displays and design briefs
Assessment criteria
The learner can:
1.1 explain the role of visual merchandising displays in marketing, promotional and sales campaigns and activities
1.2 explain the importance of the design brief in creating visual merchandising displays

Learning outcome
The learner will:
2. Understand the selection of approaches and effects in visual merchandising displays
Assessment criteria
The learner can:
2.1 explain why different approaches are needed for displays of different types of merchandise
2.2 explain how light, colour, texture, shape and dimension combine to achieve different effects

Learning outcome
The learner will:
3. Understand the sourcing of merchandise and props to be featured in visual merchandising displays
Assessment criteria
The learner can:
3.1 explain how to use a design brief to identify the items needed for a display
3.2 explain how different types of merchandise and props can attract customers' attention
3.3 explain the importance of updating stock records to account for merchandise on display

Learning outcome
The learner will:
4. Be able to plan visual merchandising displays to fulfil a design brief
Assessment criteria
The learner can:
4.1 select display locations that enable the design brief to be fulfilled
4.2 create ideas for improving the visual effect of displays, ensuring such ideas: - create the required effect   - are within the limits of the design brief   - are within the limits of the organisation's visual design policies   - are within the limits of own authority

Learning outcome
The learner will:
5. Be able to source merchandise and props to be featured in visual merchandising displays
Assessment criteria
The learner can:
5.1 agree alternative selections of merchandise and props with the designated person, when those originally specified are unavailable or unsuitable
5.2 agree arrangements with suppliers for delivery of merchandise and props
5.3 plan enough time for deliveries of merchandise and props to arrive before the display must be installed
5.4 check the progress of deliveries of merchandise and props
5.5 take action to resolve the situation when delays to deliveries of merchandise and props seem likely
5.6 update stock records to account for merchandise on display

Unit 226   Dress visual merchandising displays to attract customers (C.19)

UAN:	H/503/5696
Level:	Level 2
Credit value:	7
GLH:	35
Relationship to NOS:	SSR.C232, SSR.C233, SSR.C234
Endorsement by a sector or regulatory body:	This unit is endorsed by Skillsmart Retail, the Sector Skills Council for Retail.
Aim:	The purpose of this unit is to assess the occupational competence of individuals who dress in-store and window visual merchandising displays, guided by a design brief

Learning outcome
The learner will:
1. Understand the purpose of visual merchandising displays
Assessment criteria
The learner can:
1.1 explain the different purposes of visual merchandising displays
1.2 explain how visual merchandising displays can achieve add-on sales
1.3 explain why add-on sales are important to the organisation

Learning outcome
The learner will:
2. Understand how visual merchandising displays achieve their intended purposes
Assessment criteria
The learner can:
2.1 explain the importance of visual merchandising displays in retail environments
2.2 explain the importance of being aware of trends relating to visual merchandising
2.3 explain how props, prototypes, dressings and fixtures create visual effects within displays
2.4 explain why different kinds of merchandise need different approaches to display

Learning outcome
The learner will:
3. Be able to dress in-store displays and window displays
Assessment criteria
The learner can:

3.1 position merchandise, signage and graphics within displays:

- in ways that attract the attention and interest of target customers
- to provide the information that customers need
- in line with organisational visual merchandising guidelines

3.2 group merchandise within displays in ways that suit:

- the purpose of the display
- the style of the display
- the intended focal points of the display
- the angles from which customers will view the display
- the selling features of the merchandise
- the visual effect specified by the design brief

3.3 assess whether the display's lighting meets the design brief in achieving the required visual effects and atmosphere

3.4 check that the finished display meets organisational requirements for:

- health and safety
- security
- easy access

3.5 seek permission from the designated person to change displays when this is not within own authority

Unit 227 Order and position signage and graphics for visual merchandising displays (C.20)

UAN:	K/503/5697
Level:	Level 2
Credit value:	3
GLH:	15
Relationship to NOS:	SSR.C235, SSR.C236
Endorsement by a sector or regulatory body:	This unit is endorsed by Skillsmart Retail, the Sector Skills Council for Retail.
Aim:	The purpose of this unit is to assess the occupational competence of individuals who order and position signage and graphics for visual merchandising displays under the supervision of visual merchandising specialists

Learning outcome
The learner will:
1. Understand the role of signage and graphics within visual merchandising
Assessment criteria
The learner can:
1.1 explain the purpose of signage in visual merchandising
1.2 explain how signage can contribute to the effectiveness of visual merchandising
1.3 explain the purpose of graphics in visual merchandising
1.4 explain how graphics can contribute to the effectiveness of visual merchandising

Learning outcome
The learner will:
2. Be able to source signage and graphics to meet visual merchandising needs
Assessment criteria
The learner can:
2.1 describe to suppliers the signage and graphics required by the

design brief
2.2 order signage and graphics:
- within the required timescales
- within the available budget
- from suppliers who have confirmed they can meet the specified requirements

2.3 monitor the progress of orders for signage and graphics
2.4 assess signage and graphics when these are delivered, to ensure they meet the agreed requirements

Learning outcome
The learner will:
3. Be able to position signage and graphics to support visual merchandising
Assessment criteria
The learner can:
3.1 position signage and graphics in accordance with: • the design brief   • any house styles that apply   • any branding requirements that apply   • organisational policy on signage   • legal requirements   • the display's intended visual effect and message   • organisational safety requirements   • the need for signage and graphics to remain securely attached

Unit 228   Dismantle and store props and graphics from visual merchandising displays (C.21)

UAN:	M/503/5698
Level:	Level 2
Credit value:	3
GLH:	15
Relationship to NOS:	SSR.C237, SSR.C238
Endorsement by a sector or regulatory body:	This unit is endorsed by Skillsmart Retail, the Sector Skills Council for Retail.
Aim:	The purpose of this unit is to assess the occupational competence of individuals who are responsible for dismantling and storing props and graphics from visual merchandising displays under the supervision of visual merchandising specialists

Learning outcome
The learner will:
1. Understand the importance of storing props and graphics for future use in visual merchandising displays
Assessment criteria
The learner can:
1.1 explain the importance of labelling props and graphics before leaving them in storage
1.2 explain why records must be kept of props and graphics in storage
1.3 explain why props and graphics must be stored securely

Learning outcome
The learner will:
2. Be able to dismantle visual merchandising displays
Assessment criteria
The learner can:
2.1 dismantle displays using working practices that:
• comply with organisational health and safety requirements
• attempt to protect the components of the display from being

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damaged

2.2 return merchandise to the designated places in line with organisational procedures

2.3 dispose of unwanted items from the dismantled display in line with organisational procedures

2.4 keep records of the movement and disposal of items from dismantled displays in line with organisational procedures

2.5 clean display sites and components:

- in line with organisational procedures
- using equipment and materials suited to the task

Learning outcome
The learner will:
3. Be able to store props and graphics from dismantled visual merchandising displays

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

Unit 229   Make props and decorate fixtures and panels for visual merchandising displays (C.22)

UAN:	T/503/5699
Level:	Level 2
Credit value:	10
GLH:	45
Relationship to NOS:	SSR.C239, SSR.C240, SSR.C241, SSR.C242
Endorsement by a sector or regulatory body:	This unit is endorsed by Skillsmart Retail, the Sector Skills Council for Retail.
Aim:	The purpose of this unit is to assess the occupational competence of individuals who make props and decorate fixtures and panels for displays under the supervision of visual merchandising specialists

Learning outcome
The learner will:
1. Understand the purpose of props within visual merchandising displays
Assessment criteria
The learner can:
1.1 explain the visual effects that can be achieved with life size and scale models
1.2 explain why it is necessary to decorate panels and fixtures in creative ways
1.3 explain how decorated panels and fixtures contribute to visual effects
1.4 explain why different kinds of merchandise need different approaches to decoration

Learning outcome
The learner will:
2. Be able to specify requirements for visual merchandising props
Assessment criteria
The learner can:
2.1 produce specifications for visual merchandising props that:
• meet the design brief

- are achievable within budget and timescales
- specify the type, size and function of the props needed
- specify whether props can be obtained ready made or need to be made to order
- include plans for obtaining the props

Learning outcome
The learner will: 3. Be able to make props for use in visual merchandising displays
Assessment criteria

The learner can:
3.1 select techniques, materials, tools and equipment that are suited to making the props specified in the design brief
3.2 produce final versions of props, ensuring they:
    • follow the requirements of the design brief
    • follow organisational health and safety requirements
    • are finished within the required timescales

Learning outcome
The learner will: 4. Be able to decorate fixtures and panels for visual merchandising displays
Assessment criteria

The learner can:
4.1 select decorative techniques and materials that:
    • attempt to create the visual effect required by the design brief
    • are within cost limits
4.2 use tools, equipment and materials for decorative work in line with organisational procedures
4.3 produce finished decorative work that:
    • is free from faults
    • has the visual impact required by the design brief
    • is consistent with the design brief
    • is completed within required timescales

Unit 230   Assemble visual merchandising displays (C.23)

UAN:	D/503/5700
Level:	Level 2
Credit value:	4
GLH:	20
Relationship to NOS:	SSR.C243, SSR.C244
Endorsement by a sector or regulatory body:	This unit is endorsed by Skillsmart Retail, the Sector Skills Council for Retail.
Aim:	The purpose of this unit is to assess the occupational competence of individuals who assemble displays under the supervision of visual merchandising specialists, based on organisational guidelines provided in the form of plans, elevations and drawings

Learning outcome
The learner will:
1. Understand the purpose of layout design
Assessment criteria
The learner can:
1.1 explain what layout design is
1.2 explain the role of layout design in effective visual design practice

Learning outcome
The learner will:
2. Know how to interpret instructions for assembling visual merchandising displays
Assessment criteria
The learner can:
2.1 describe the essential features and detailed requirements of display layouts as specified in plans, elevations and drawings
2.2 describe organisational health and safety and security arrangements needed for displays as specified in plans, elevations and drawings
2.3 describe potential problems with assembling displays, where such problems are apparent from plans, elevations and drawings

Learning outcome
The learner will:
3. Be able to assemble visual merchandising displays
Assessment criteria
The learner can:
3.1 plan the activities and resources needed to assemble displays as specified in plans, elevations and drawings
3.2 assemble displays in line with:
• organisational guidelines provided
• agreed deadlines
• organisational health and safety requirements
3.3 make adjustments to assembled displays to achieve creative effects within limits of own authority and the guidelines provided
3.4 take actions to resolve problems that arise when assembling displays, within the guidelines provided

Unit 304   Manage staff to receive goods in a retail environment (B.37)

UAN:	D/503/5681
Level:	Level 3
Credit value:	5
GLH:	24
Relationship to NOS:	SSR.B301
Endorsement by a sector or regulatory body:	This unit is endorsed by Skillsmart Retail, the Sector Skills Council for Retail.
Aim:	The purpose of this unit is to assess the occupational competence of a team leader or senior team member to manage staff to receive goods

Learning outcome
The learner will:
1. Be able to manage staff to receive and check incoming deliveries of goods in a retail environment
Assessment criteria
The learner can:
1.1 select sufficient staff to prepare for, receive and check expected incoming deliveries of goods
1.2 explain to staff, in advance of deliveries of goods arriving:
• what needs to be done to prepare the receiving area
• what needs to happen when the expected deliveries arrive
1.3 assess whether the area for receiving goods has been adequately prepared to ensure safe and secure unloading of goods
1.4 assess whether there is enough storage space of the right type for the expected goods
1.5 ensure that goods are unloaded safely and securely
1.6 explain why incoming goods should be checked against requirements immediately after unloading
1.7 ensure that incoming goods are checked against requirements immediately after unloading
1.8 ensure that delivery records are completed in line with organisational procedures
1.9 evaluate records of deliveries of goods to determine whether each supplier has met the organisation's service needs
1.10 resolve problems with deliveries of goods in line with organisational procedures

Unit 305   Organise and monitor the storage of stock in a retail environment (B.38)

UAN:	H/503/5682
Level:	Level 3
Credit value:	6
GLH:	27
Relationship to NOS:	SSR.B302, SSR.B303
Endorsement by a sector or regulatory body:	This unit is endorsed by Skillsmart Retail, the Sector Skills Council for Retail.
Aim:	The purpose of this unit is to assess the occupational competence of a team leader or senior member of a retail team who is responsible for monitoring the quality of stock and use of storage facilities

Learning outcome
The learner will:
1. Understand the causes and prevention of stock loss within storage systems
Assessment criteria
The learner can:
1.1 explain the causes of stock deterioration, loss and damage
1.2 explain how to reduce stock loss within storage systems

Learning outcome
The learner will:
2. Understand the legal and organisational requirements for storing stock
Assessment criteria
The learner can:
2.1 explain the legal and organisational requirements for storing stock, including health and safety requirements and the removal of out-of-date stock

Learning outcome
The learner will:
3. Be able to organise the use of storage facilities in a retail environment
Assessment criteria
The learner can:
3.1 organise storage facilities to take account of:
• day-to-day work
• safety requirements
• the need to keep stock secure
• the need to keep stock in a saleable condition
3.2 train staff to use the storage system:
• securely
• safely
• in line with relevant legal requirements
3.3 assign staff clear roles and responsibilities for storing and moving stock
3.4 develop plans to cope with unforeseen storage problems that take account of available resources
3.5 review plans for coping with unforeseen storage problems
3.6 revise plans to cope with unforeseen storage problems, taking account of any relevant factors
3.7 monitor storage operations to ensure that staff are storing and moving stock:
• securely
• safely
• in line with relevant legal requirements
• 3.8 maintain stock records that are in line with organisational procedures

Learning outcome
The learner will:
4. Be able to monitor the storage and care of stock in a retail environment
Assessment criteria
The learner can:
4.1 maintain a routine that meets the organisation's requirements for checking the quality of storage facilities and stock
4.2 perform spot checks of storage facilities and stock
4.3 train staff to:
• identify stock that is out of date or at risk of deteriorating
• deal with stock that is out of date or at risk of deteriorating in line with legal requirements and organisational procedures
4.4 monitor the storage and movement of stock to make sure that stock is reaching the shop floor as it is needed
4.5 recommend to decision makers ways of running storage and stock movement systems more profitably

| Unit 308 | Choose merchandise to feature in visual merchandising displays (C.24) |

UAN:	H/503/5701
Level:	Level 3
Credit value:	6
GLH:	27
Relationship to NOS:	SSR.C330, SSR.C331
Endorsement by a sector or regulatory body:	This unit is endorsed by Skillsmart Retail, the Sector Skills Council for Retail.
Aim:	The purpose of this unit is to assess the occupational competence of visual merchandising specialists who are responsible for choosing the merchandise to be featured in visual merchandising displays and negotiating with decision makers regarding those displays.

Learning outcome
The learner will:
1. Understand the purpose of featuring merchandise in visual merchandising displays
Assessment criteria
The learner can:
1.1 explain the role of displays featuring merchandise in marketing, promotional and sales campaigns and activities
1.2 explain the importance of being creative when selecting merchandise for displays

Learning outcome
The learner will:
2. Be able to evaluate merchandise for its display potential
Assessment criteria
The learner can:
2.1 evaluate the suitability of different items of merchandise for featuring in a display, with respect to: • the purpose of the display

• the potential of the merchandise to attract and interest customers
• whether the merchandise to be featured is consistent with the organisation's visual display policy
• the availability of the merchandise within the timescale for preparing the display
• the cost of obtaining the merchandise in relation to the budget available for the display

Learning outcome
The learner will:
3. Be able to liaise with decision makers concerning the merchandise to be featured in a display
Assessment criteria
The learner can:
3.1 explain to decision makers:
• the reasons for the choice of merchandise for display
• how the merchandise would feature in the display
3.2 reach an agreement with decision makers concerning the choice of merchandise before work starts on assembling the display
3.3 reach agreement with decision makers concerning arrangements and timescales for the supply of merchandise

Unit 309   Manage the use of signage and graphics in visual merchandising displays (C.25)

UAN:	K/503/5702
Level:	Level 3
Credit value:	7
GLH:	31
Relationship to NOS:	SSR.C332, SSR.C333, SSR.C334
Endorsement by a sector or regulatory body:	This unit is endorsed by Skillsmart Retail, the Sector Skills Council for Retail.
Aim:	The purpose of this unit is to assess the occupational competence of visual merchandising specialists who are responsible for specifying signage and graphics to be used in visual merchandising displays to achieve the intended effects of a design brief.

Learning outcome
The learner will:
1. Understand how signage and graphics are used in visual merchandising displays
Assessment criteria
The learner can:
1.1 explain how the look of signage and graphics in visual merchandising displays can attract customers
1.2 explain how signage and graphics are used in visual merchandising displays to convey information to customers

Learning outcome
The learner will:
2. Understand the importance of complying with legal requirements relating to the use of signage and graphics in visual merchandising
Assessment criteria
The learner can:
2.1 explain the importance of   complying with legal requirements relating to the use of signage and graphics in visual merchandising displays

Learning outcome
The learner will:
3. Understand the importance of monitoring the use of signage and graphics in visual merchandising displays
Assessment criteria
The learner can:
3.1 explain the importance of monitoring the use of signage and graphics in visual merchandising displays to ensure that they are being used as intended

Learning outcome
The learner will:
4. Be able to assess the signage and graphics needed for visual merchandising displays
Assessment criteria
The learner can:
4.1 assess the types and quantities of signage and graphics that will best: • suit the purpose of the display • meet legal requirements • comply with the organisation's visual design policy 4.2 confirm with decision makers that proposals for the use of signage and graphics are acceptable

Learning outcome
The learner will:
5. Be able to source the signage and graphics needed for visual merchandising displays
Assessment criteria
The learner can:
5.1 confirm with suppliers: • the type of signage and graphics needed • quantities • costs • delivery dates • delivery arrangements 5.2 assess whether the signage and graphics received from suppliers meet specified requirements before they are used

Learning outcome
The learner will:
6. Be able to co-ordinate the use of signage and graphics in visual merchandising
Assessment criteria
The learner can:
6.1 distribute signage and graphics by the deadlines agreed in the design brief to those who are responsible for putting them on display

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6.2 explain to colleagues how they should install signage and graphics to meet the design brief
6.3 check that signage and graphics are installed in line with specifications

Learning outcome
The learner will:
7. Be able to monitor the use of signage and graphics in visual merchandising
Assessment criteria
The learner can:
7.1 perform checks on visual merchandising displays to ensure that signage and graphics are still being used as intended
7.2 request feedback from colleagues on the use of signage and graphics on display
7.3 take corrective action when signage and graphics are not being used in line with organisational procedures or the design brief

Unit 310   Evaluate the effectiveness of visual merchandising displays (C.26)

UAN:	M/503/5703
Level:	Level 3
Credit value:	9
GLH:	46
Relationship to NOS:	SSR.C335, SSR.C336
Endorsement by a sector or regulatory body:	This unit is endorsed by Skillsmart Retail, the Sector Skills Council for Retail.
Aim:	The purpose of this unit is to assess the occupational competence of visual merchandising specialists who are responsible for evaluating the effectiveness of displays.

Learning outcome
The learner will:
1. Understand the types of evidence used to evaluate the effectiveness of visual merchandising displays
Assessment criteria
The learner can:
1.1 explain the importance of evaluating the effectiveness of visual merchandising displays
1.2 explain when the effectiveness of visual merchandising displays should be evaluated
1.3 explain which types of information are the most useful for evaluating the effectiveness of visual merchandising displays
1.4 explain the meaning of 'validity' and 'reliability' in relation to the measurement of customers' responses to visual merchandising displays

Learning outcome
The learner will:
2. Be able to gather information about customers' responses to visual merchandising displays
Assessment criteria
The learner can:

2.1 research customers' responses to visual merchandising displays, ensuring that the information gathered is:

- valid

- reliable

- gathered in line with organisation's communications policy

- gathered in ways that attempt to maintain   the goodwill and co operation of those providing the information

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Learning outcome

The learner will:

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

Assessment criteria

The learner can:

3.1 agree the standards for evaluating the effect of visual merchandising displays with decision makers

3.2 analyse the evidence of the effectiveness of visual merchandising displays fairly against the agreed standards

3.3 evaluate the effectiveness   of visual merchandising displays in terms of:

- the purpose of the display

- customers' responses to it

3.4 recommend to decision makers improvements that could be made to the way visual merchandising is carried out in the store, based on the research findings and conclusions

| Unit 311 | **Manage budgets for visual merchandising projects (C.27)** |

UAN:	T/503/5704
Level:	Level 3
Credit value:	10
GLH:	46
Relationship to NOS:	SSR.C337, SSR.C338
Endorsement by a sector or regulatory body:	This unit is endorsed by Skillsmart Retail, the Sector Skills Council for Retail.
Aim:	The purpose of this unit is to assess the occupational competence of visual merchandising specialists who are responsible for managing the budgets of visual merchandising projects.

Learning outcome
The learner will:
1. Understand the importance of controlling expenditure on visual merchandising projects

Assessment criteria
The learner can:
1.1 explain the importance to the organisation of controlling expenditure on visual merchandising projects

Learning outcome
The learner will:
2. Understand the concept of 'value for money' when managing visual merchandising projects

Assessment criteria
The learner can:
2.1 explain what 'value for money' means when managing visual merchandising project
2.2 explain why 'value for money' does not just mean paying the lowest prices

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Learning outcome
The learner will:
3. Be able to agree costs with decision makers for visual merchandising projects
Assessment criteria
The learner can:
3.1 calculate estimates of the costs of proposed visual merchandising projects
3.2 prepare business cases for visual merchandising project budgets that show how value for money will be achieved
3.3 present budget proposals to decision makers in ways that attempt to persuade them to adopt the proposals
3.4 negotiate budgets with decision makers in ways that attempt to keep them committed to the project's aims

Learning outcome
The learner will:
4. Be able to control costs for visual merchandising projects
Assessment criteria
The learner can:
4.1 explain to colleagues the cost limits they must work within on visual merchandising projects
4.2 maintain accurate records of project expenditure in line with organisational procedures
4.3 identify unacceptable discrepancies in project expenditure
4.4 take action to resolve any discrepancies in project expenditure when this falls within own authority
4.5 report unacceptable discrepancies in project costs to the designated person when resolving such discrepancies is not within own authority
4.6 identify areas where value for money could have been improved within budget limits for the project

Learning outcome
The learner will:
5. Be able to keep colleagues informed on expenditure on visual merchandising projects
Assessment criteria
The learner can:
5.1 keep colleagues informed on expenditure on visual merchandising projects

Unit 312 Contribute to improving a retail organisation's visual merchandising policy (C.28)

UAN:	A/503/5705
Level:	Level 3
Credit value:	8
GLH:	36
Relationship to NOS:	SSR.C339, SSR.C340
Endorsement by a sector or regulatory body:	This unit is endorsed by Skillsmart Retail, the Sector Skills Council for Retail.
Aim:	The purpose of this unit is to assess the occupational competence of visual merchandising specialists who are expected to suggest improvements to an organisation's visual design and to ensure that staff follow the organisation's visual design policy.

Learning outcome
The learner will:
1. Understand how visual merchandising and visual design can benefit an organisation

Assessment criteria
The learner can:
1.1 explain how having a visual merchandising policy can help the organisation to achieve its aims
1.2 explain how visual design can help to promote and sell goods and services
1.3 explain what customer focused design is
1.4 explain how customer-focused design can benefit the organisation

Learning outcome
The learner will:
2. Be able to evaluate the organisation's approach to visual design

Assessment criteria
The learner can:
2.1 research what internal and external customers want and expect from

the visual design of the organisation

2.2 analyse research findings to identify internal and external customers' wishes and expectations concerning visual design in the organisation

2.3 evaluate whether current and recent visual designs used in the organisation meet internal and external customers' wishes and expectations

Learning outcome
The learner will:
3. Be able to recommend new ideas for the organisation's visual design
Assessment criteria
The learner can:
3.1 develop ideas for improving the organisation's approach to visual design
3.2 create ideas for improving the visual design of the organisation
3.3 assess whether own design ideas are relevant to the needs of the organisation
3.4 present visual design recommendations to decision makers

Learning outcome
The learner will:
4. Be able to support staff putting the organisation's visual design policy into practice
Assessment criteria
The learner can:
4.1 explain the organisation's visual design policy to staff in a way that attempts to encourage understanding and commitment
4.2 provide opportunities for staff to ask questions
4.3 perform checks to ensure that visual designs used in the organisation are consistent with the organisation's visual design policy
4.4 report to own line manager any problems with implementing the visual design policy that are not within own authority to resolve

Unit 313 Design visual merchandising display layouts (C.29)

UAN:	F/503/5706
Level:	Level 3
Credit value:	10
GLH:	46
Relationship to NOS:	SSR.C341, SSR.C342
Endorsement by a sector or regulatory body:	This unit is endorsed by Skillsmart Retail, the Sector Skills Council for Retail.
Aim:	The purpose of this unit is to assess the occupational competence of visual merchandising specialists who are responsible for designing display layouts and providing guidance on how to assemble those designs.

Learning outcome
The learner will:
1. Understand the importance of display layout design in visual merchandising
Assessment criteria
The learner can:
1.1 explain what layout design is
1.2 explain the role of layout design in visual merchandising
1.3 explain the importance of developing creative and practical display layout ideas in visual merchandising

Learning outcome
The learner will:
2. Understand the elements of creative layout design solutions
Assessment criteria
The learner can:
2.1 explain how to choose and combine scale, shape, colour, texture and focal points to produce creative layout design solutions
2.2 explain the role of dimension, shape, colour, texture and location in creative layout design

Learning outcome
The learner will:
3. Understand the importance of display layout designs to those who put layouts together
Assessment criteria
The learner can:
3.1 explain why specifications, drawings and supporting information are needed by those who will put layouts together

Learning outcome
The learner will:
4. Be able to develop creative ideas for display layouts
Assessment criteria
The learner can:
4.1 assess which layout best meets the intended purpose of the display
4.2 generate different ideas for the design of the display layout
4.3 evaluate ideas for the design of the display layout, using relevant criteria including: • cost • the time available to prepare the display
4.4 select the display layout idea that is most likely to achieve the required visual effect within time and cost limits
4.5 develop the chosen display layout idea in more detail ensuring that it: • fulfils the precise design requirements • is still achievable within the available time and cost • will fit the available space • can be assembled and used safely
4.6 reach an agreement with decision makers on the final layout

Learning outcome
The learner will:
5. Be able to produce guidance to enable the assembly of display layout
Assessment criteria
The learner can:
5.1 produce a drawing of the display layout that: • uses visual merchandising drawing and coding conventions to give information • specifies the dimensions and orientation of the layout • specifies the standards of the finished layout
5.2 estimate the quantities of materials needed for specified display layouts
5.3 estimate the costs of materials and services needed for specified display layouts, doing so: • within the design requirement for the layouts • within cost limits
5.4 provide detailed information on the layout design to enable the display to be assembled safely

Unit 316   Work effectively and support others in a retail organisation (E.08)

UAN:	H/503/5729
Level:	Level 3
Credit value:	10
GLH:	50
Relationship to NOS:	SSR.E335, SSR.E336, SSR.E337
Endorsement by a sector or regulatory body:	This unit is endorsed by Skillsmart Retail, the Sector Skills Council for Retail.
Aim:	The purpose of this unit is to assess the occupational competence of a team leader or senior team member within a retail team, to work effectively and support others to contribute to the success of the wider organisation.

Learning outcome
The learner will:
1. Understand how own team contributes to the success of the wider organisation

Assessment criteria
The learner can:
1.1 explain own team's purpose, aims and targets in the context of the wider organisation
1.2 explain the roles and responsibilities of colleagues in own team
1.3 explain the importance of good working relations within own team

Learning outcome
The learner will:
2. Understand own role within a team in a retail environment

Assessment criteria
The learner can:
2.1 explain own responsibility for contributing to own team's success, including helping colleagues to learn
2.2 explain the importance of being a reliable team member
2.3 explain the factors to take account of when making commitments,

including:

- existing workload
- the degree to which interruptions and changes of plan are within own control

2.4 explain the importance of implementing the organisation's policies and procedures for health and safety, including the importance of setting a good example to colleagues

Learning outcome
The learner will: 3. Understand what motivates self and colleagues in a retail environment
Assessment criteria
The learner can: 3.1 explain the factors that can affect own and colleagues' motivation to carry out work in a retail environment, including skills and existing workload 3.2 explain potential circumstances that could affect morale in a retail environment

Learning outcome
The learner will: 4. Be able to support effective working within a retail team
Assessment criteria
The learner can: 4.1 allocate work in ways that take account of own and colleagues' preferences, skills and available time 4.2 make and keep commitments to colleagues within: - own team - the wider organisation 4.3 agree alternative actions when it is not possible to keep commitments made to colleagues 4.4 interact with colleagues within own team and wider organisation in ways that attempt to maintain morale 4.5 explain to team members why it is important to treat each other fairly, politely and with respect 4.6 implement own organisation's health and safety procedures while working

Learning outcome
The learner will: 5. Be able to improve own work performance in own retail team
Assessment criteria
The learner can: 5.1 identify knowledge and skills needed to improve own work performance 5.2 reach agreement with own line manager concerning: - learning and development goals - action points and deadlines for own learning and development

| 5.3 take measures to improve own performance |
| 5.4 review own progress against an agreed learning and development plan, including seeking feedback from those in a position to give it |

Learning outcome
The learner will:
6. Be able to help others to learn in a retail environment
Assessment criteria
The learner can:
6.1 communicate to colleagues own willingness and availability to provide work-related information and advice
6.2 provide information and advice on request to colleagues where this is within own responsibility
6.3 provide advice and support to colleagues to help them meet the organisation's standards
6.4 communicate procedures to colleagues in a logical sequence to help them meet the organisation's standards
6.5 provide colleagues with opportunities to practise new skills
6.6 provide constructive feedback to colleagues on their progress in developing new skills
6.7 ensure that health, safety and security are not compromised when helping others to learn
6.8 refer colleagues to specialist advice as needed to support their learning

Unit 317   Deputise for the leader of a retail team (E.09)

UAN:	Y/503/5730
Level:	Level 3
Credit value:	11
GLH:	55
Relationship to NOS:	SSR.E338
Endorsement by a sector or regulatory body:	This unit is endorsed by Skillsmart Retail, the Sector Skills Council for Retail.
Aim:	The purpose of this unit is to assess the occupational competence of individuals who deputise for a team leader within a retail environment. The competent individual is expected to be able to manage and motivate peer colleagues to carry out their day-to-day duties.

Learning outcome
The learner will:
1. Understand the standards of performance required of own retail team when deputising for a team leader
Assessment criteria
The learner can:
1.1 explain team leader responsibilities in relation to:
- health and safety   - equality, diversity and inclusion   - security   - staffing levels   - absence reporting   - timekeeping   - personal appearance   - handling customer complaints
1.2 explain relevant legislation and regulations relating to the products the team sells
1.3 explain the importance of setting an example to team members by following organisational procedures and policies at all times

Learning outcome
The learner will:
2. Understand how to gain the co-operation of own retail   team when deputising for team leader

Assessment criteria
The learner can:
2.1 explain the challenges involved in temporarily managing peer colleagues
2.2 explain how clear communication helps teams to work effectively
2.3 explain why it is important for a team leader to be approachable and trustworthy, including the importance of maintaining confidentiality
2.4 explain the importance of treating all team members fairly

Learning outcome
The learner will:
3. Be able to maintain the standards of performance of own retail team when deputising for a team leader

Assessment criteria
The learner can:
3.1 communicate accurate information and instructions to the team
3.2 set an example for own team by following organisational procedures and policies when deputising for a team leader
3.3 perform checks to ensure that team members follow organisational procedures and policies

Learning outcome
The learner will:
4. Be able to manage the morale of own retail team when deputising for a team leader

Assessment criteria
The learner can:
4.1 allocate work tasks to team members in ways that attempt to maintain the morale of the team
4.2 use methods to motivate own team that are suited to individual team members' existing levels of motivation and expertise
4.3 praise good performance both to the individuals concerned and to management
4.4 provide support to team members who are having difficulty coping with their work, in ways suited to the individual and the situation
4.5 communicate potentially sensitive information only to those who have a right to receive it

Learning outcome
The learner will:
5. Be able to manage own performance when deputising for a team leader

Assessment criteria
The learner can:

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5.1 manage own time to carry out other work duties when deputising for a team leader
5.2 follow organisational procedures when problems arise when deputising for a team leader

Unit 318 Contribute to the continuous improvement of retail operations within own area of responsibility (E.10)

UAN:	D/503/5731
Level:	Level 3
Credit value:	10
GLH:	47
Relationship to NOS:	SSR.E301, SSR.E302, SSR.E303
Endorsement by a sector or regulatory body:	This unit is endorsed by Skillsmart Retail, the Sector Skills Council for Retail.
Aim:	The purpose of this unit is to assess the occupational competence of a first line manager or senior team member in relation to the contribution they make to improving operations within their own area of responsibility. The learner could contribute to improving performance against any operational measure set by the organisation, such as sales targets, service standards or quality standards.

Learning outcome
The learner will:
1. Understand how own area of responsibility can contribute to the overall success of the retail organisation
Assessment criteria
The learner can:
1.1 explain characteristics of the organisation's brand image, customer base and desired market position
1.2 explain the relationship between the agreed performance measures for own area of responsibility and the organisation's brand image and desired market position
1.3 explain how systems and procedures in own area of responsibility are intended to support the achievement of organisational performance measures
1.4 explain potential causes of failure to achieve organisational performance measures in the type of retail operations carried out in own area of responsibility

Learning outcome
The learner will:
2. Understand how to motivate staff in own area of responsibility to support and contribute to the continuous improvement of retail operations

Assessment criteria
The learner can:
2.1 explain why it is important for staff to understand the purpose and intended benefits of improvements to retail operations
2.2 explain how own manner when explaining improvements can affect staff's response to these
2.3 explain the importance of encouraging staff to suggest ideas for improvement to retail operations
2.4 explain the importance of ensuring that colleagues receive the credit if their ideas are implemented
2.5 explain the importance of showing enthusiasm and leading by example when putting improvements into practice

Learning outcome
The learner will:
3. Be able to evaluate achievements of organisational performance measures for retail operations within own area of responsibility

Assessment criteria
The learner can:
3.1 evaluate organisational performance within own area of responsibility using information that is : • relevant • reliable • up to date

Learning outcome
The learner will:
4. Be able to develop recommendations for improving the effectiveness of retail operations

Assessment criteria
The learner can:
4.1 develop ideas to improve the effectiveness of operations in own area of responsibility
4.2 evaluate which ideas for improvements to the effectiveness of operations in own area of responsibility should be put forward to decision makers, based on the extent to which the ideas are: • consistent with the organisation's brand image • consistent with organisational policy • achievable, given the available resources • beneficial to the organisation and its customers

Learning outcome
The learner will:
5. Be able to recommend ideas for improving the effectiveness of retail operations to decision makers
Assessment criteria
The learner can:
5.1 present ideas to decision makers for possible improvements, doing so: • with supporting facts • acknowledging any contributions made by other people
5.2 explain to decision makers the benefits the recommended improvements could bring
5.3 justify to decision makers the resources needed to put improvements into practice
5.4 clarify any aspects of the recommended improvements decision makers wish to discuss further

Learning outcome
The learner will:
6. Be able to contribute to the implementation of planned improvements to retail operations within own area of responsibility
Assessment criteria
The learner can:
6.1 explain planned improvements to staff in ways that attempt to: • make clear the benefits of the proposed changes • encourage involvement in implementing proposed changes
6.2 ensure that staff have everything they need to implement proposed changes including additional training
6.3 seek advice and support to resolve any problems with implementing proposed changes that are not within own authority to resolve
6.4 demonstrate to staff own commitment to achieving the benefits of proposed changes through own behaviour

Appendix 1 Units for which simulated activities are allowed

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

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

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

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

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

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Unit number	Unit title	UAN
230	Assemble visual merchandising displays (C.23)	D/503/5700
232	Provide National Lottery products to customers (C.37)	L/503/5708
233	Advise customers on the fixing and care of tiles (C.42)	R/503/5709
235	Promote a retail store's credit card to customers in a retail environment (C.47)	R/503/5712
239	Help customers to apply for a retail store's credit card and associated insurance products (C.52)	M/503/5717
240	Help customers to choose delicatessen products in a retail environment (C.54)	T/503/5718
241	Portion delicatessen products to meet customer requirements in a retail environment (C.55)	A/503/5719
243	Demonstrate make-up and skincare products to customers at a beauty counter in a retail environment (C.59)	T/503/5721
244	Operate a customer record card system on a beauty counter in a retail environment (C.60)	A/503/5722
303	Monitor and help improve food safety in a retail environment (B.22)	L/503/5675
308	Choose merchandise to feature in visual merchandising displays (C.24)	H/503/5701
309	Manage the use of signage and graphics in visual merchandising displays (C.25)	K/503/5702
310	Evaluate the effectiveness of visual merchandising displays (C.26)	M/503/5703
311	Manage budgets for visual merchandising projects (C.27)	T/503/5704
312	Contribute to improving a retail organisation's visual merchandising policy (C.28)	A/503/5705
313	Design visual merchandising display layouts (C.29)	F/503/5706
314	Help customers to choose alcoholic beverages in a retail environment (C.45)	J/503/5710
320	Produce staffing schedules to help a retail team to achieve its targets (E.12)	K/503/5733

Appendix 3 Relationships to other qualifications

Links to other qualifications

Mapping is provided as guidance and suggests areas of commonality between the qualifications. It does not imply that candidates completing units in one qualification have automatically covered all of the content of another.

Centres are responsible for checking the different requirements of all qualifications they are delivering and ensuring that candidates meet requirements of all units/qualifications.

Literacy, language, numeracy and ICT skills development

These qualifications can develop skills that can be used in the following qualifications:

- Functional Skills (England) – see **www.cityandguilds.com/functionalskills**
- Essential Skills (Northern Ireland) – see **www.cityandguilds.com/essentialskillsni**
- Essential Skills Wales – see **www.cityandguilds.com/esw**

Appendix 4 Sources of general information

The following documents contain essential information for centres delivering City & Guilds qualifications. They should be referred to in conjunction with this handbook. To download the documents and to find other useful documents, go to the **Centres and Training Providers homepage** on **www.cityandguilds.com**.

Centre Manual - Supporting Customer Excellence contains detailed information about the processes which must be followed and requirements which must be met for a centre to achieve 'approved centre' status, or to offer a particular qualification, as well as updates and good practice exemplars for City & Guilds assessment and policy issues. Specifically, the document includes sections on:

- The centre and qualification approval process
- Assessment, internal quality assurance and examination roles at the centre
- Registration and certification of candidates
- Non-compliance
- Complaints and appeals
- Equal opportunities
- Data protection
- Management systems
- Maintaining records
- Assessment
- Internal quality assurance
- External quality assurance.

Our Quality Assurance Requirements encompasses all of the relevant requirements of key regulatory documents such as:

- Regulatory Arrangements for the Qualifications and Credit Framework (2008)
- SQA Awarding Body Criteria (2007)
- NVQ Code of Practice (2006)

and sets out the criteria that centres should adhere to pre and post centre and qualification approval.

Access to Assessment & Qualifications provides full details of the arrangements that may be made to facilitate access to assessments and qualifications for candidates who are eligible for adjustments in assessment.

The **centre homepage** section of the City & Guilds website also contains useful information such on such things as:

- **Walled Garden**: how to register and certificate candidates on line
- **Qualifications and Credit Framework (QCF)**: general guidance about the QCF and how qualifications will change, as well as information on the IT systems needed and FAQs
- **Events**: dates and information on the latest Centre events
- **Online assessment**: how to register for GOLA/e-volve assessments.

Useful contacts

UK learners General qualification information	T: +44 (0)844 543 0033 E: **learnersupport@cityandguilds.com**
International learners General qualification information	T: +44 (0)844 543 0033 F: +44 (0)20 7294 2413 E: **intcg@cityandguilds.com**
Centres Exam entries, Certificates, Registrations/enrolment, Invoices, Missing or late exam materials, Nominal roll reports, Results	T: +44 (0)844 543 0000 F: +44 (0)20 7294 2413 E: **centresupport@cityandguilds.com**
Single subject qualifications Exam entries, Results, Certification, Missing or late exam materials, Incorrect exam papers, Forms request (BB, results entry), Exam date and time change	T: +44 (0)844 543 0000 F: +44 (0)20 7294 2413 F: +44 (0)20 7294 2404 (BB forms) E: **singlesubjects@cityandguilds.com**
International awards Results, Entries, Enrolments, Invoices, Missing or late exam materials, Nominal roll reports	T: +44 (0)844 543 0000 F: +44 (0)20 7294 2413 E: **intops@cityandguilds.com**
Walled Garden Re-issue of password or username, Technical problems, Entries, Results, e-assessment, Navigation, User/menu option, Problems	T: +44 (0)844 543 0000 F: +44 (0)20 7294 2413 E: **walledgarden@cityandguilds.com**
Employer Employer solutions, Mapping, Accreditation, Development Skills, Consultancy	T: +44 (0)121 503 8993 E: **business@cityandguilds.com**
Publications Logbooks, Centre documents, Forms, Free literature	T: +44 (0)844 543 0000 F: +44 (0)20 7294 2413

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