

NVQ in Carry and Deliver Goods level 2

Candidate Guidance and Portfolio

Candidate name:

The National Occupational Standards which form the basis of this award were developed by Skills for Logistics. This document is for candidate use only and should not be used as a substitute for the National Occupational Standards.

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58 Robertson Street, Dalkeith,
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Section 1 — General information about NVQs

Introducing NVQs

The qualification you are undertaking is a National Vocational Qualification (NVQ).

NVQs are work-based qualifications which assess the skills and knowledge people have and need to perform their job role effectively. The qualifications are designed using national occupational standards.

For each industry sector there is a Sector Skills Council (SSC) which is made up of representatives from the industry or profession and it is the SSC's responsibility to develop the national occupational standards.

These standards define what employees, or potential employees, must be able to do, how well and in what circumstances to show they are competent in their work.

The Sectors Skills Council for Carry and Deliver Goods level 2 is Skills for Logistics.

Access to NVQs is open to all and you can be assessed either against a particular unit(s) or against the full NVQ. There are no entry requirements, no prescribed method of delivery, no time constraints for completion or age limits.

NVQs are available at five levels of achievement which reflect the various technical and supervisory skills, knowledge, and experience which employees should have as they progress in their industry.

Who offers NVQs?

An organisation which offers NVQs is called a Centre. This may be a school, college, university, employer, training provider or a combination of these. The Centre has responsibility for the quality of the qualification and is required to work within an awarding body's policies and guidelines.

Edexcel is your awarding body for this NVQ. This means that we are an organisation approved by government to design qualifications and awards. An awarding body endorses candidates' certificates so that an employer can be sure the qualification has gone through a rigorous and effective assessment process.

What is the structure of an NVQ?

All NVQs have a common structure and consist of standards which can be broken down into various parts:

Units & Elements	Units define the broad functions carried out in your particular job and are made up of a number of elements . Each element describes a specific work activity which you have to perform and may relate to skills or to the demonstration of knowledge and understanding.
Performance criteria	The level and quality of how you should carry out these activities is determined by a number of statements called performance criteria . Performance criteria are used to judge your competence.
Evidence requirements	The Evidence requirements specify the amount and type of evidence which you will need to provide to your assessor to show that you have met the standards specified in the performance criteria and in all the circumstances defined in the range statements.
Knowledge and understanding	The section on knowledge and understanding states what you must know and understand and how this knowledge applies to your job.

If you are not yet clear about how we define standards — just remember that the standards have been developed by experts within your industry or profession and that all candidates aiming for this particular NVQ are being assessed against the same standards.

You will find an example of an NVQ element overleaf.

An example of an NVQ Element

UNIT: (1) Working safely in an engineering environment

This is the **UNIT** title — it describes a role and task.

Element 1 Comply with statutory regulations and organisational requirements

This is the **ELEMENT** title. It describes part of the main role and task.

Performance Criteria

You must ensure that you:

PERFORMANCE CRITERIA set out the standard of performance you need to demonstrate consistently to claim competence in a particular **element**.

1. Describe your duties and obligations (as an individual) under the Health and Safety at Work Act 1974.
2. Comply with Statutory Regulations at all times.
3. Comply with organisational safety policies and procedures at all times.

Evidence Requirements

The things you must prove that you can do:

You need to demonstrate that you understand your duties and obligations under both statutory regulations and organisational requirements and you can do this by:

1. Giving an adequate explanation of the duties and responsibilities of every individual as described in the Health and Safety at Work Act 1974.
2. Ensuring that whilst carrying out your work and/or visiting other areas of the working environment you are aware of the specific safety requirements and regulations governing your activities.

Knowledge and Understanding

You must prove that you know and understand:

1. The roles and responsibilities of your self and others under the Health and Safety at Work Act 1974.
2. The general regulations that apply to you being at work.
3. The specific regulations which govern your work activities.

The **KNOWLEDGE & UNDERSTANDING** Requirements state what you must know and understand and how this knowledge applies to your job.

How are NVQs achieved?

When you consistently meet the standards described in the elements and show that you have the required skills and knowledge across the range, you can then claim that you are *competent* in each unit. You can claim certification for single units or whole awards. Your Centre will register your claim to competence through the Awarding Body. The Awarding Body you are registered with for this NVQ is Edexcel .

The process of gaining an NVQ is flexible and depends on your needs. At the beginning of the process your assessor will review your existing competence in relation to the standards and identify the most suitable NVQ. The level you start at will depend on the type and breadth of your current job role together with your past experience, skills and any relevant prior learning.

To achieve an NVQ, or a unit of an NVQ, you must:

- ◆ demonstrate you meet the requirements of the performance criteria by collecting appropriate evidence as specified by the evidence requirements. This evidence is assessed against the national standards by a qualified assessor, who will be allocated to you by your Centre. This will usually be someone who knows you, such as a manager or supervisor.

Evidence may come from:

- ◆ the **accreditation of prior learning** — where evidence relates to past experience or achievements
- ◆ **current practice** — where evidence is generated from a current job role
- ◆ a **programme of development** — where evidence comes from assessment opportunities built into a learning/training programme whether at or away from the workplace
- ◆ a combination of these

How are NVQs assessed?

Assessment is based on what you can do and involves you, your assessor, an internal verifier and an external verifier — see "Who does what in NVQs" on the following page.

You will be asked to prove you are competent by providing evidence which shows:

- ◆ you can perform all the specified tasks consistently to the required standard (**performance criteria**)
- ◆ you understand why you are doing things (**knowledge and understanding**)

Assessment is flexible and you can be certificated for each unit you successfully achieve, even if you do not complete the full NVQ. There is no set period of time in which you need to complete a unit. However, you and your assessor should still set target dates for completing each unit, otherwise your qualification could go on forever. Be realistic though, as there are many factors such as your previous experience, demands within your workplace and an availability of resources which will affect how quickly you are able to achieve the qualification.

Who does what in NVQs?

A number of individuals and organisations have parts to play in NVQ assessment. Their roles have been designed to guarantee fair, accurate and consistent assessment.

	<i>Who are they?</i>	<i>What is their role?</i>
Candidates	The person who wants to achieve the NVQ — in this case, you.	Need to show they can perform to national occupational standards in order to be awarded an NVQ or unit(s).
Assessors*	An experienced person in the same area of work as the candidate eg supervisor.	Judge the evidence of a candidate's performance, knowledge and understanding against the national occupational standards. Decide whether the candidate has demonstrated competence. Provide guidance and support to the candidate. Assist with planning assessments, giving feedback and recording candidate progress.
Internal Verifiers*	Individuals appointed by an approved Centre to ensure the quality of assessment within the Centre.	Advise assessors and maintain the quality of assessment in a Centre. Systematically sample assessments to confirm the quality and consistency of assessment decisions.
Approved Centres	Organisations approved by Edexcel to coordinate assessment arrangements for NVQs.	Manage assessment on a day to day basis. Must have effective assessment practices and internal verification procedures. Must meet criteria laid down by awarding bodies and be able to provide sufficiently-competent assessors and internal verifiers.
External Verifiers*	Individuals appointed by the Edexcel to ensure that standards are being applied uniformly and consistently across all Centres offering the NVQ.	Check the quality and consistency of assessments, both within and between Centres, by systematic sampling. Make regular visits to Centres to ensure they still meet the criteria to deliver NVQs.

* Assessors and internal and external verifiers are required to have occupational expertise in the NVQs which they are assessing/verifying. They must also have, or be working towards, an appropriate qualification in assessment and verification.

What is evidence?

To claim competence for an NVQ unit you need to gather evidence which shows you have met the standards. It is important that your evidence is easily understood so that it can be checked against the standards, by both your assessor, your Centre and the Awarding Body.

Evidence can take many forms including:

- ◆ direct observation of your performance by your assessor
- ◆ products of your work
- ◆ authenticated statement — witness testimony
- ◆ personal statement
- ◆ outcomes from questioning
- ◆ outcomes from simulation
- ◆ case studies
- ◆ assignments or projects
- ◆ Accreditation of Prior Learning (APL) — evidence from the past

It is important that your evidence is:

- ◆ **valid** — it relates to the NVQ standard you are trying to prove
- ◆ **authentic** — the evidence, or an identified part of it (eg a report) was produced by *you*
- ◆ **consistent** — achieved on more than one occasion
- ◆ **current** — usually not more than two years old
- ◆ **sufficient** — covers all the performance and knowledge requirements laid down in the standards

Your evidence may be collected through a range of sources, such as employment, voluntary work, training programmes and interests/activities which you perform outside your work. It can also be produced in various formats, eg your own reports; testimonies from colleagues, supervisors or members of the public; projects; models; audio tapes, photographs; videos.

When you first begin your NVQ, you and your assessor should identify all the units and elements where you can use **integration of assessment**. Further details about integration of assessment can be found on page 10.

Demonstrating knowledge, understanding and skills

In order to meet the standards, you may also be required to prove knowledge and understanding. Each unit contains a list summarising the knowledge, understanding and skills a candidate must possess. Evidence of how these have been achieved and applied could be included in the performance evidence as one or all of the following:

- ◆ descriptions of why a particular approach was used
- ◆ personal reports about the learning process
- ◆ reflective reports which include how a theory or principle was applied
- ◆ assessment interviews
- ◆ assessment tests
- ◆ responses to questioning

These should be included in your portfolio.

How will my assessor check I have the knowledge and understanding listed in the standards?

For some units, it will be clear to your assessor that you have the required knowledge and understanding from how you carry out your work. This is often referred to as *knowledge and understanding apparent from performance*. There will be other occasions though, when your assessor will be unsure if you know why, for example, it is important to give information to clients in certain situations. This could be because your assessor has not had the opportunity to observe all the performance criteria and range during assessment. In these situations, your assessor may wish to assess your knowledge and understanding by asking you some questions. These questions can be given orally or in writing, but will be recorded in your portfolio as evidence.

Your assessor could also check you have the required level of knowledge and understanding by asking you to produce personal statements or to complete a project or assignment.

What if I have previous experience and knowledge and understanding from work and other qualifications?

If you have previous work experience, skills, and knowledge and understanding which you feel is relevant to your NVQ, you should tell your assessor about it. Your assessor may ask you for more proof in the form of letters from previous employers/training providers or details about any courses you have completed.

For example, you may have achieved an HNC in a relevant subject in which case your assessor may feel that you already have some of the knowledge and understanding required for the NVQ.

The process of matching your previous experience and learning is often referred to as the Accreditation of Prior Learning (APL). The purpose of this process is to try and give you some credit towards your NVQ for things you can already do to the national standard. Your assessor judges the evidence available and matches it against the requirements of the NVQ. This means that your assessor should not have to assess you for these things all over again.

However, the success of this process depends on *you* telling *your assessor* what previous work experience or knowledge and understanding you have and how you think it is relevant to your NVQ. The more information you can supply to support your claims, the easier it should be to convince your assessor that you are competent.

When can simulation be used?

Throughout your NVQ, the emphasis is on you being able to carry out real work activities so assessment will normally be carried out in the workplace itself.

There may be times, however, when it might not be appropriate for you to be assessed while you are working. For example your NVQ might require you to carry out emergency or contingency procedures (for safety or confidentiality reasons) or your job role may not cover all aspects of the qualification. In such instances, when you have no other means of generating evidence, **simulation** might be appropriate.

Simulation is any structured exercise involving a specific task which reproduces real-life situations. Care must be taken though to ensure that the conditions in which you are assessed *exactly* mirror the work environment ie it is a **realistic working environment**.

You and your assessor should check the assessment strategy for your NVQ carefully to find out the Sector Skills Council's (SSC's) view of what constitutes a realistic working environment. Some SSCs stipulate the specific elements which are suitable for this approach.

Integration of assessment

It is not necessary for you to have each element assessed separately — doing so could result in assessment which takes too long and places too great a burden on you and your assessor.

There will be instances when you will be able to use one piece of evidence to prove your competence across different elements or performance criteria. You may even find that evidence is relevant for different units — this is called **integration of assessment**.

When you first begin your NVQ, you and your assessor will spend time looking at the standards, planning how much time you are both able to devote to the qualification and drawing up an action plan.

At this stage, you should identify any activities which relate to more than one unit or outcome and arrange for the best way to collect a single piece of evidence which satisfactorily covers all the performance criteria.

If you are going to integrate assessments, make sure that the evidence is cross-referenced to the relevant units. Details of how to cross reference your evidence can be found in Section 2 "How to compile your portfolio".

Section 2 — How to compile your portfolio (including worked examples)

General information

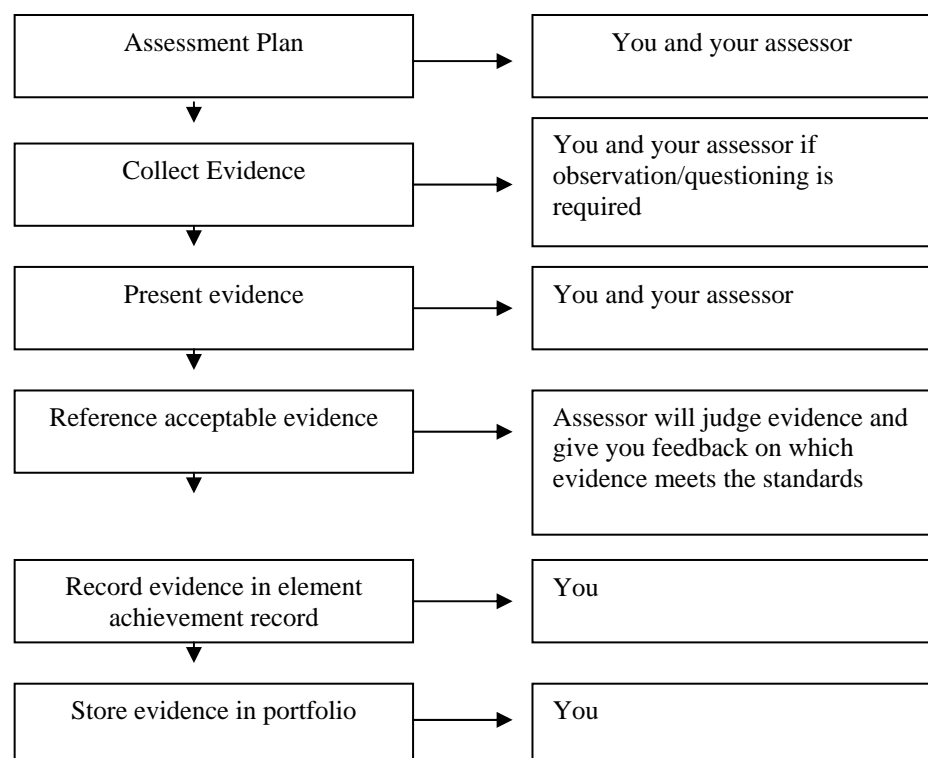
A portfolio, like a log book, is a way of recording evidence of your achievements. It is a collection of different items of evidence which indicates that you have the required skills, knowledge and understanding to support your claim to a qualification.

The production of a well-organised, clearly labelled portfolio which relates each piece of evidence to the relevant outcomes and performance criteria requires a careful methodical approach. When your assessor looks through your portfolio, they will find the task of making judgements about your competence much easier if the information in it is presented in a logical sequence.

You will need to present your evidence in a format that is easy to read and in which materials can be added or taken away. This section gives suggestions on how to lay out and present your evidence and includes worked examples. There are also forms and matrices which will assist you to chart your progress through the award.

You do not have to lay out your evidence in the way suggested but you may find it helpful to do so. Each portfolio will be different in content but all should include information about you (the candidate), the organisation where you are undertaking your qualification, the assessor and so on.

Evidence Collection Process



Planning your portfolio

Start by carefully reading through the standards and, together with your assessor, decide which units you might like to work on first. You do not have to do the units in order. There may be some units that relate to tasks which you carry out on a regular basis, therefore making it easier to collect evidence right away. Alternatively, there may be activities in other units which you only undertake now and again, these can be left until the opportunity arises for you to collect evidence.

Before you start looking for different kinds of evidence and deciding if they should be included in your portfolio, you will find it helpful to plan how you will carry out the tasks and how long they are going to take.

The plan is usually referred to as an “**assessment plan**”. It should be produced in discussion with your assessor and will set out the different stages in developing your portfolio. You will probably want to produce a plan for each unit.

It is unlikely that you will be able to complete all of the units straight away and you should therefore think about starting with those units where you have a lot of experience and in which you work well. You should also remember to identify any opportunities for **integration of assessment**.

We have provided you with a “**Unit progress record**” — see Example 2. Each time you complete a unit, your assessor should sign and date the relevant section on the form. At this stage, it might be a good idea to check that all your evidence and recording documents have been completed correctly and can easily be located. You can then circle the reference number of that unit in the checkboxes at the top of the form so that you can see at a glance what stage you are at in your NVQ.

Starting your portfolio

Make sure that you clearly label your portfolio (or disk if you are recording your evidence electronically) with your name together with the title and level of the award.

Your portfolio will need a *title page* and a *contents page*. You should also complete a *Personal Profile* which records details about yourself and your job as well as providing information about your employer, training provider or college. Blank samples of these forms are provided in Section 4.

We recommend that you compile your portfolio in the following order:

Title Page
Contents Checklist
Personal Profile
Unit Progress Record
Completed Element Achievement Records
Index of Evidence
Pieces of evidence
Glossary of terms
Standards

Contents checklist

You might also find it useful to complete the following checklist as you work your way through your portfolio. This will help you to see if you have included all the relevant items. Once you have completed your portfolio, you will be able to use this checklist again as a contents page, by inserting the relevant page or section numbers in the right hand column.

	Completed?	Page/Section number
Title page for the portfolio	<input type="checkbox"/>	
Personal profile		
◆ your own personal details	<input type="checkbox"/>	
◆ a brief CV or career profile	<input type="checkbox"/>	
◆ description of your job	<input type="checkbox"/>	
◆ information about your employer/training provider/college	<input type="checkbox"/>	
Unit Assessment Plans	<input type="checkbox"/>	
Unit progress record	<input type="checkbox"/>	
Completed Element Achievement Records for each unit		
◆ signed by yourself, your assessor and the internal verifier (where relevant)	<input type="checkbox"/>	
◆ Evidence reference numbers included	<input type="checkbox"/>	
Index of evidence (with cross-referencing information completed)	<input type="checkbox"/>	
Evidence (with reference numbers)		
◆ observation records	<input type="checkbox"/>	
◆ details of witnesses (witness testimony sheets)	<input type="checkbox"/>	
◆ personal statements	<input type="checkbox"/>	
◆ products of performance	<input type="checkbox"/>	

Collecting your evidence

All of the evidence which you collect and present for assessment must be relevant to your NVQ. Your assessor will help you choose which pieces of evidence you should include.

We have provided blank forms in Section 4 of this document, which you can photocopy to help you record and present your evidence. Although we have provided you with sample forms, your Centre may have their own recording documents which they would prefer you to use.

Some of these forms eg **observation records** and the **record of questions and answers**, will be completed by your assessor. Other forms (**witness testimonies**) will be used by people other than your assessor to testify that they have observed you doing your job, and there is one for you to complete called a **personal statement**.

Explanations are given below about how and when these forms should be used.

Observation record (Example 5)

The observation record is used by your assessor to record what tasks you have performed and to what standard. There is also a section for your assessor to note which other units or outcomes are covered by this evidence ('integration of assessment').

The assessor will discuss with you which performance criteria you have successfully achieved and give you feedback. This form should then be given a reference number and included in your portfolio as part of your evidence.

Witness testimony (Example 6)

There may be occasions when your assessor is not available to observe you carrying out certain aspects of your job. In such instances, it may be appropriate for another person to comment about your performance by completing a statement called a 'witness testimony'.

Witness testimony should only be used as supporting evidence and should:

- ◆ be provided by a person, not related to you, who is in a position to make a valid comment about your performance eg supervisor, line manager or possibly a client/customer
- ◆ contain comments which specifically relate your performance to the standards
- ◆ be authenticated by the inclusion of the witness's signature, role, address, telephone number and the date

It is unlikely that your assessor would make an assessment decision based on witness testimony alone. They would normally supplement this type of evidence with questioning.

Record of questions and candidate's answers (Example 7)

This form is used to record any questions which your assessor may ask, to establish whether you have the required level of knowledge and understanding associated with each unit. There is also space on the form for your answers to be noted.

Personal statement (Example 4)

There will be times when you need to put a piece of your evidence in context for your assessor so that they can decide if it is relevant to your NVQ. You can complete personal statements to help you do this - these can relate either to the pieces of evidence or to each outcome or unit.

For example, you may refer to paperwork which is often used in your organisation to help you pass on information to a colleague. It may not be clear to an assessor why you are communicating to your colleague in this way and a **brief** explanation of the paperwork and why it is relevant to a particular part of your NVQ may be required.

A personal statement might also be used to record your experience of something, such as, how you handled a specific situation. This can be documented in your personal statement and should be a description of what you did, how you did it and why you did it. It will also allow you to include the people who were present and either assisted you or witnessed your actions. This, in turn, might identify who you should approach for 'witness testimony'. In your personal statement you could also refer to product evidence that you have produced (eg reports, notes, completed forms), these can also be included as evidence in your portfolio.

The personal statement can be a piece of evidence in itself and should therefore be included in your portfolio.

Presenting your evidence

It is important to present all of your evidence in a clear, consistent and legible manner. Your assessor will then find it much easier to make appropriate judgements about the quality, sufficiency and currency of the materials you are putting forward for consideration.

It is not necessary to produce all of your evidence in typewritten format - some hand-written pieces of evidence, such as notes, will be perfectly acceptable.

There may also be items of evidence which you cannot physically include in your portfolio. This might be for confidentiality reasons or it could be that something which you have produced as part of your day-to-day work is normally kept in a filing cabinet or stored electronically in a PC.

In compiling your portfolio, we suggest that anything you produce as part of your day-to-day work is kept in its normal location, but those pieces of evidence which have been produced specifically for your NVQ, eg witness testimony statements or personal statements, are filed in your portfolio. However, assessors and verifiers should be able to locate and access your evidence at all times. It is, therefore, very important that you clearly reference every item of evidence.

Referencing your evidence

Your assessor, as well as the internal and external verifiers, will need to find their way around your portfolio, so you should give each piece of evidence a number.

Remember, that where you have used "integration of assessment", you need to give details of all the units and elements which are linked to a specific piece of evidence. The links should be noted on the pieces of evidence themselves as well as on the index of evidence (cross-referencing).

How to complete the Index of evidence (Example 1)

You should complete an *index of evidence* sheet and file it immediately before the actual pieces of evidence in your portfolio.

The index of evidence should be completed by:

- ◆ entering the evidence number in the first column
- ◆ giving a brief description of each piece of evidence in the second column
- ◆ explaining where the evidence can be found in the third column

You must make sure that the information contained in the evidence index is accurate when you give your portfolio to your assessor, particularly in relation to where the evidence can be located.

Completing the Element Achievement Records (Example 3)

There is an Element achievement record for every element within this portfolio. These records have been designed to allow you to record the evidence you have gathered for each element. Each record has boxes across it which represent the performance criteria and knowledge and understanding statement, these will differ from element to element so it is important to make sure you are using the right one. Whilst collecting your evidence you should use these grids to display the performance criteria and knowledge and understanding that piece of evidence relates to. In the first box write the evidence index number you have given to that piece of evidence. In the second box give a brief description of the evidence, then tick against the relevant performance criteria and knowledge and understanding.

Worked examples

To give you a clearer picture of how to compile your portfolio, you will find worked examples of the various forms over the next few pages. You should ask your assessor for further advice and support if you are still unsure about how to use the forms and who should complete them.

Index of evidence

(Example 1)

NVQ title and Level: Using IT at Level 3

Evidence number	Description of evidence	Included in portfolio (Yes/No) If no, state location	Sampled by the IV (initials and date)
1	Action plan identifying customer requirements	Yes	
2	Personal Statement	Yes	
3	Witness Testimony	Yes	
4	Record of Questions and Answers	Yes	
5	Log of configuration details and errors	Yes	
6	Observation Checklist	Yes	
7	Procedure for shutting down system	Yes	
8	Company media storage policy	No. Can be found with General Manager	

Unit progress record

(Example 2)

Qualification and Level: Using IT at Level 3

Candidate: Anne Thomas

To achieve the whole qualification, you must prove competence in **mandatory** units and **optional** units.

Unit Checklist - circle the reference number of each unit as you complete it.

Circle the reference numbers as you complete each unit. You can then easily see what stage you have reached in your NVQ.

Mandatory	206	301	302	303	308		
Optional	305	306	311	312	326	327	

Mandatory units

Unit Number	Title	Assessor	Date
206	Ensure your own actions reduce risks to H&S		
301	Select and enable IT for use	P. Jones	28/4/2005
302	Maintain the Software Environment	P. Jones	28/4/2005
303	Develop & maintain the effectiveness of the IT working environment	P. Jones	8/4/2005
308	Develop your own effectiveness and professionalis		

This section of the form is for your assessor to sign each time you successfully achieve a unit.

Optional Units

305	Design & produce docum		
306	Design & produce spreadsheets		
311	Design and use databases		
312	Design & produce documents using graphics		
326	Design & produce presentations using IT		
327	Control the use of electronic communication		

Element achievement record

(Example 3)

Unit title: Select & enable IT for use

Element: 301.1 Select & configure equipment for use

Evidence Index No	Description of Evidence	Performance Criteria								Knowledge & Understanding				
		a	b	c	d	e	f	g	h	K1	K2	K3	K4	K5
1	Action Plan	4	4			4								
2	Personal Statement	4	4			4								
3	Copy of Legislation			4	4									
5	Record of Questions & Answers	4	4	4		4								
6	Log of Configuration Details						4	4	4					

These numbers relate to your Evidence Index and will allow your assessor to find your evidence easily

Give a brief description of the evidence you are offering for assessment against each performance criteria, range and piece of knowledge and understanding

As you collect your evidence for assessment you should tick the relevant boxes. There is a box which represents each performance criteria and range in the element

Candidates should enter which areas of knowledge and understanding that piece of evidence covers.

Candidate: _____ Assessor: _____ IV: _____

Date: _____ Date: _____ Date: _____

Personal statement

(Example 4)

Date	Evidence index number	Details of statement	Links to other evidence (enter numbers)	Units, elements, pcs, and range covered
4/4/00	1	<p>Statement that I know and understand customer requirements. Names of customer and software and hardware requirements in portfolio.</p> <p>Statements that I understand how to set up, equipment, configure software that met customer requirements. Details of equipment and software with dates are listed in portfolio.</p>	1	301.1.a,b,e

Candidate signature: *Anne Thomas*

Date: 2/4/2005

Observation Record

(Example 5)

Unit/Element(s): (301) Select and Enable IT for Use

Candidate: Anne Thomas Date of observation: 28/4/2005

Evidence index number: 8

Skills/activities observed:	PCs and range covered:
Saving and storing files	Element 301.3 PCs: a-f

Knowledge and understanding apparent from this observation:

Candidate can save and organise files. She can delete unwanted files and can shut down system according to organisation's procedures and manufacturer's instructions.

Other units/elements to which this evidence may contribute:

302.1.b,c

Assessor comments and feedback to candidate:

I can confirm the candidate's performance was satisfactory.

Assessor signature: Peter Jones

Date: 28/4/2005

Candidate signature: Anne Thomas

Date: 28/4/2005

Witness testimony

(Example 6)

NVQ title and Level:	Using IT Level 3		
Candidate name:	<i>Anne Thomas</i>		
Evidence index no:	4		
Where applicable, evidence no. to which this testimony relates:			
Element(s):	301.2	Range:	1
Date of evidence:	8/4/2005		
Witness name:	Ian Cummings		
Designation/relationship to candidate:	Line manager		
Details of testimony:	I can attest that I observed Anne Thomas following company and national regulations in the use of software. She understands and has knowledge of these regulations and I observed her following them when selecting and configuring software.		
I can confirm the candidate's evidence is authentic and accurate.			
Witness signature:	<i>Ian Cummings</i>		
Name:	Ian Cummings		
Date:	8/4/2005		

Please tick the appropriate box:

A1/A2 or D32 / D33 Award

Familiar with the NVQ standards to which the candidate is working

Record of questions and candidate's answers (Example 7)

Unit: 301 Select & enable IT for use	Element(s): 1
Evidence index number: 5	
<p>Circumstances of assessment: As part of the staff induction scheme IT staff are regularly interviewed and asked about their knowledge and skills. Anne Thomas was interviewed on the 21 March 2005 and below is a summary of the interview where it relates to her knowledge of resources and problem solving.</p>	
<p>List of questions and candidate's responses:</p> <p>Q: If a member of staff asked you for a particular piece of equipment, would procedures would you follow?</p> <p>A: I would ensure that a hardware requisition form has been filled out with the rational for needing such equipment, countersigned by their line and general managers. If approved, next step would be to ask the member of staff if they need specific training. Pc 301.1.a,b,e</p> <p>Q: You discover that a member of staff has installed a piece of software on their workstation PC. What do you do?</p> <p>A: If they installed it themselves then this is a serious breach of company regulations and I would inform the IT manager. I would then remove the software. Pc 301.1.c</p>	
Assessor's signature: Davinder Singh	Date: 21/3/2005
Candidate's signature: <i>Anne Thomas</i>	Date: 21/3/2005

Section 3 — The units and recording documents for your NVQ

Unit Progress Record

Qualification and level: Carry and Deliver Goods level 2

Candidate: _____

To achieve the whole qualification, you must prove competence in all **6 mandatory** units plus **one** from two **optional** units, depending on work role.

Please note the table below shows the SSC identification codes listed alongside the corresponding SQA unit numbers. It is important that the SQA unit numbers are used in all your recording documentation and when your results are communicated to SQA. SSC identification codes are **not valid** in these instances.

Unit Checklist - circle the reference number of each unit as you complete it.

Mandatory	CDG1	CDG2	CDG3	CDG4	CDG5	CDG6
Optional	CDG7	CDG8				

Mandatory units (*all units should be completed*)

SSC Unit Number	Title	Assessor	Internal Verifier	Date
CDG 1	Contribute to effective working relationships			
CDG 2	Maintaining the safety and the security of the load, self and property			
CDG 3	Contribute to the provision of customer services			
CDG 4	Complete pre-journey and post-journey procedures			
CDG5	Planning the route and timings for the delivery and collection of loads			
CDG6	Transport goods and materials			

Continued on the next page

Optional Units <i>(candidates should choose one, dependent on job role)</i>				
SSC Unit Number	Title	Assessor	Internal Verifier	Date
CDG7	Handling goods and materials			
CDG8	Handling goods (motorcycle and pedal cycle)			

Additional Units <i>(candidates may choose to complete the following Units to complement the qualification, but they do not form part of the qualification structure)</i>				
CDG9	Dealing with payment transactions			
CDG10	Operate specialised plant and machinery to performance requirements (lifting and transferring)			
CDG11	Lift, transfer and position loads			

UNIT (CDG 1) Contribute to effective working relationships

This unit has the following elements:

Element 1 (1.1)	Maintain own performance in achieving quality standards
Element 2 (1.2)	Work with colleagues to optimise productivity

Unit Summary

Element 1 Maintain own performance in achieving quality standards

You must be able to maintain your own performance in achieving quality standards. You must be able to confirm tasks, priorities and responsibilities clearly and accurately with the person setting them and perform those tasks in a way that is consistent with good practice within your organisation. You must maintain your personal appearance, equipment and work area in accordance with operational and organisation procedures, and report clearly, accurately and promptly to the relevant person any circumstances that prevent the achievement of the appropriate quality standards. You must seek constructive feedback on work achievement and performance from the appropriate people and identify your own learning needs accurately from this feedback and observation of your own performance. You must seek and take realistic opportunities to meet your own learning needs.

Element 2 Work with colleagues to optimise productivity

You must be able to work with colleagues to optimise productivity. You must confirm the responsibility for shared tasks with colleagues accurately and clearly and offer support to colleagues, if required, that is relevant to their priorities and consistent with your own responsibilities. You must accurately identify any misunderstandings and conflicts that are detrimental to working relationships and seek constructive solutions promptly. You must promptly action any requests by others that fall within your responsibility and explain clearly and politely and propose constructive alternatives when it is not possible for you to agree to others requests. When you need to ask for assistance or information from colleagues you must do so in clear and constructive manner.

UNIT (CDG 1)

Contribute to effective working relationships

Element 1 (1.1)

Maintain own performance in achieving quality standards

Performance Criteria

You must be able to:

- 1 Confirm tasks, priorities and responsibilities clearly and accurately with the person setting them.
- 2 Perform work tasks in ways that are consistent with good practice in your organisation.
- 3 Maintain your personal appearance, equipment and the work area in accordance with operational and organisation procedures.
- 4 Report clearly, accurately and promptly the circumstances that prevent achievement of quality standards, to the relevant person.
- 5 Seek constructive feedback on work achievement and performance from people in a position to give it.
- 6 Identify your own learning needs accurately from feedback and observation of your own performance.
- 7 Seek and take realistic opportunities to meet your learning needs.

Knowledge and Understanding

You must know and understand:

- a) the importance of understanding your own work role and the quality standards and output targets associated with it
- b) the quality and output requirements of yourself and colleagues
- c) accepted working practices
- d) requirements for special clothing, standards of appearance and methods for maintaining your equipment and work area
- e) circumstances that may prevent you meeting these standards
- f) the importance of feedback in improving personal work performance
- g) how to identify learning needs
- h) opportunities for learning that are available and how to select the relevant ones
- i) reporting mechanisms if quality standards cannot be achieved

UNIT (CDG 1)

Contribute to effective working relationships

Element 1 (1.1)

Maintain own performance in achieving quality standards

Evidence requirements

The assessor should be confident that the outcomes have been produced by competent performance and that the candidate is capable of repeating competent performance. Evidence of competency will probably be collected over a period of time in the normal work environment or under similar conditions. Those providing witness testimony must be occupationally competent and reliable to recognise and support the evidence of competence for the candidate.

For this element evidence will be from performance, outcome of performance and questioning supported by witness testimony. The candidate will need to have knowledge and understanding of the importance of understanding their own work role and the quality standards and output targets associated with it. They will need to know what the quality and output requirements for themselves and colleagues are and what accepted good working practices are. They will need to know whether they need special clothing, what the standards of appearance are, and how to maintain their equipment and work area. The candidate will need to understand what circumstances may prevent meeting standards and why feedback is important in improving personal work performance, and who can give constructive feedback. They will need to know how to identify learning needs and they will need to know what opportunities for learning are available and how to select relevant ones. They will also need to know who should be told when quality standards cannot be achieved

The assessor must ascertain that the candidate has a clear understanding of legislation, regulations and codes of practice relating to the work being carried out.

When assessing knowledge and understanding it would be expected that any questioning would be recorded.

Evidence should come from observing the candidate during his or her normal and typical work activities. The assessor must look to confirm that the candidate can maintain own performance in achieving quality standards. The candidate will need to demonstrate that they can do this during the differing **work contexts** of busy trading periods and normal trading periods. The candidate will need to show that they can maintain **quality standards** in quality of output, quantity of output and health and safety requirements. The candidate will also need to show how they can identify with **learning opportunities**, formal or informal.

Evidence from records produced and maintained by the candidate on current and previous work done in how they maintain own performance in achieving quality standards should also be readily available for the assessor to inspect.

UNIT (CDG1)

Contribute to effective working relationships

Evidence requirement (cont)

Evidence from personal statements for the whole unit should explain how you work with others and how by doing so, you do your job well resulting in high quality standards of work. This would include:

- ◆ how you deal with colleagues on a daily basis
- ◆ how you deal with a colleague who disagrees with you about something
- ◆ how you would cope with colleagues who may disagree about responsibilities or working methods
- ◆ how you would deal with any unfair discrimination or harassment within the workplace
- ◆ show that you are able to keep commitments made to colleagues
- ◆ explain who you report to and for what areas, and on what occasions you will need to discuss specific issues with your immediate boss
- ◆ in what circumstances you have to seek your boss's authority
- ◆ you ask people to give you constructive feedback on how you do your job
- ◆ you decide on learning needs and future opportunities to improve further

Note: Trading periods within the Road Haulage and Distribution Sector are operating periods.

UNIT (CDG 1)

Contribute to effective working relationships

Element 1 (1.1)

Maintain own performance in achieving quality standards

Additional Evidence

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (CDG 1)

Contribute to effective working relationships

Element 2 (1.2)

Work with colleagues to optimise productivity

Performance Criteria

You must be able to:

- 1 Confirm responsibility for shared tasks clearly and accurately with colleagues.
- 2 Offer support to colleagues that is relevant to their priorities and consistent with meeting your own responsibilities.
- 3 Accurately identify misunderstanding and conflicts that are detrimental to working relationships and seek constructive solutions promptly.
- 4 Promptly action requests by others that fall within your responsibility.
- 5 Explain clearly and politely and propose constructive alternatives when it is not possible for you to agree to others' requests.
- 6 Ask colleagues for information and assistance in a clear and constructive manner.

Knowledge and Understanding

You must know and understand:

- a) the importance of clarifying roles and responsibilities
- b) the importance of supporting colleagues and the difference it make to productivity
- c) ways of supporting colleagues
- d) how to recognise when colleagues need support and how to decide if giving support is consistent with your responsibilities
- e) the importance of recognising difficulties and misunderstandings and way of dealing with them constructively
- f) how to make and respond to requests for support constructively, including how to respond when you cannot action requests
- g) the importance of keeping confidential information

UNIT (CDG 1) Contribute to effective working relationships

Element 2 (1.2) Work with colleagues to optimise productivity

Evidence requirements

The assessor should be confident that the outcomes have been produced by competent performance and that the candidate is capable of repeating competent performance. Evidence of competency will probably be collected over a period of time in the normal work environment or under similar conditions. Those providing witness testimony must be occupationally competent and reliable to recognise and support the evidence of competence for the candidate.

For this element evidence will be from performance, outcome of performance, questioning supported by witness testimony. The candidate will need to have knowledge and understanding of the importance of clarifying roles and responsibilities and what quality requirements relate to the work. They will need to understand the importance of supporting colleagues and the difference it makes to quality and output. They will also need to know ways of supporting colleagues and how to recognise when colleagues need support and how to determine whether giving support is consistent with own responsibilities. The candidate will need to understand the importance of recognising difficulties and misunderstandings and ways of dealing with them constructively, including informal methods and formal approaches such as: grievance and disciplinary procedures. They will need to know and understand how to make and respond to requests for support constructively, including occasions when you cannot action the request. They will also need to know the importance of keeping confidential information

The assessor must ascertain that the candidate has a clear understanding of legislation, regulations and codes of practice relating to the work being carried out.

When assessing knowledge and understanding it would be expected that any questioning would be recorded.

Evidence should come from observing the candidate during his or her normal and typical work activities. The assessor needs to ensure that the candidate can work with colleagues to optimise productivity. The candidate will need to demonstrate how they work with **colleagues**, be they fellow workers, managers or employee representatives. They will also demonstrate the **support offered to others**, be it by giving information, giving advice, sharing work or training. The assessor will also need to see how the candidate deals with **misunderstandings and conflicts**, these could be personal differences, disputes about responsibilities and working methods, unfair discrimination and harassment.

Evidence from records produced and maintained by the candidate on current and previous occasions to work with colleagues to optimise productivity was carried out, should also be readily available for the assessor to inspect.

UNIT (CDG 1) Contribute to effective working relationships

Evidence requirements (cont)

Evidence from personal statements for the whole unit should explain how you work with others and how by doing so, you do your job well resulting in high quality standards of work. This would include:

- ◆ how you deal with colleagues on a daily basis
- ◆ how you deal with a colleague who disagrees with you about something
- ◆ how you would cope with colleagues who may disagree about responsibilities or working methods
- ◆ how you would deal with any unfair discrimination or harassment within the workplace
- ◆ show that you are able to keep commitments made to colleagues
- ◆ explain who you report to and for what areas, and on what occasions you will need to discuss specific issues with your immediate boss
- ◆ in what circumstances you have to seek your boss's authority
- ◆ you ask people to give you constructive feedback on how you do your job
- ◆ you decide on learning needs and future opportunities to improve further

Note: Trading periods within the Road Haulage and Distribution Sector are operating periods.

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UNIT (CDG 1)

Contribute to effective working relationships

Element 2 (1.2)

Work with colleagues to optimise productivity

No	Description of Evidence	Performance Criteria						Knowledge and Understanding						
		1	2	3	4	5	6	a	b	c	d	e	f	g

UNIT (CDG 1)

Contribute to effective working relationships

Element 2 (1.2)

Work with colleagues to optimise productivity

Additional Evidence

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (CDG 2) Maintaining the safety and the security of the load, self and property

This unit has the following elements:

Element 1 (2.1)	Identify the legal, safety and operating requirements for the vehicle and the load
Element 2 (2.2)	Protect the vehicle and load from security risks

Unit Summary

Element 1 Identify the legal, safety and operating requirements for the vehicle and the load

The candidate should know his or her own responsibilities under the legal, safety and operating requirements that relate to the vehicles they drive, the loads carried and the roads used. This knowledge should enable the candidate to contribute at all times to the safety and security of themselves, loads and property. The responsibilities will relate to highway codes, transport regulations, load restrictions, alcohol limits, drug restrictions and driver's hours. Competency in this area should therefore be demonstrated consistently and throughout normal work activities. The candidate should know what the relevant responsibilities are and where to get information to help them meet these responsibilities. The candidate should also be able to recognise and deal with any problem related to meeting their legal, safety or operating responsibilities.

Element 2 Protect the vehicle and load from security risks

The candidate should be able to demonstrate contribution to the protection of vehicles and loads from security risks in different locations. These risks include theft of the vehicle, the load or personal items, vandalism and arson. Locations include overnight or daytime parking, refuelling, during loading or unloading, and while driving. The candidate will therefore need to know the security risks associated with different loads and locations, and will be expected to know and follow organisational security procedures, taking appropriate and safe emergency or responsive action when necessary. The candidate should be able to report any theft or damage, or pass on any suggestions for improving security to the appropriate person. The candidate will also need to know and keep to the relevant legal, safety and operating requirements associated with protecting vehicles from security risks.

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UNIT (CDG 2)

Maintaining the safety and the security of the load, self and property

Element 1 (2.1)

Identify the legal, safety and operating requirements for the vehicle and the load

Performance Criteria

Knowledge and Understanding

You must be able to:

You must know and understand:

- 1 Obtain information on the **legal, safety, and operating requirements** that apply to driving their vehicles, carrying the loads, and the roads used.
- 2 Demonstrate knowledge of the legal, safety, and operating requirements of the vehicle and the load before driving.
- 3 Confirm that the correct driving licence for the vehicle being driven is held.
- 4 Check their own fitness to drive safely in compliance with all relevant legal, safety and operating requirements.
- 5 Identify any problems in complying with relevant legal, safety and operating requirements and take appropriate action.

- a) where to obtain information on legal, safety, and operating requirements for driving, drivers hours regulations, axle loads, projections of load (front, rear, side) and vehicle movements on the road
- b) what type of problems with legal, safety, and operating requirements for driving, drivers hours regulations, axle loads projections of load (front, rear, side) and vehicle movements on the road
- c) the legal, safety, and operating requirements for driving, drivers hours regulations, axle loads projections of load (front, rear, side) and vehicle movements on the road

UNIT (CDG 2) Maintaining the safety and the security of the load, self and property

Element 1 (2.1) Identify the legal, safety and operating requirements for the vehicle and the load

Evidence requirements

In order to make a fair assessment decision, the assessor must be certain that the candidate produced the evidence being used, and is capable of repeating competent performance. Evidence of competency will probably be collected over a period of time in the normal work place, or under similar conditions.

Evidence should come from observing the candidate during his or her normal and typical work activities, asking the candidate questions to confirm knowledge, or observing the candidate demonstrating that knowledge, as well as talking with work colleagues of the candidate. The evidence for this element should confirm knowledge of the relevant legal, safety and operating requirements.

The emphasis of this element is the candidate knowing the legal, safety and operating requirements he or she is expected to meet, before undertaking activities related to driving laden goods vehicles. Where a candidate does not have this knowledge or understanding, he or she will be expected to find the information and confirm their understanding of it.

UNIT (CDG 2)

Maintaining the safety and the security of the load, self and property

Element 1 (2.1)

Identify the legal, safety and operating requirements for the vehicle and the load

Additional Evidence

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (CDG 2)

Maintaining the safety and the security of the load, self and property

Element 2 (2.2)

Protect the vehicle and load from security risks

Performance Criteria

Knowledge and Understanding

You must be able to:

You must know and understand:

- 1 Demonstrate the organisational security procedures to the vehicle and load in different **locations**.
- 2 Demonstrate the correct emergency procedures.
- 3 Report any theft or damage according to organisational procedures.

- a) what are the security risks associated with the vehicle and load
- b) what are the security risks associated with different loads
- c) what are the security risks of different locations
- d) what are the organisation's procedures relating to the security of the vehicle
- e) what are the actions that should be taken for different types of security risk

UNIT (CDG 2)

Maintaining the safety and the security of the load, self and property

Element 2 (2.2)

Protect the vehicle and load from security risks

Evidence requirements

In order to make a fair assessment decision, the assessor must be certain that the candidate produced the evidence being used, and is capable of repeating competent performance. Evidence of competency will probably be collected over a period of time in the normal work place, or under simulated conditions.

Evidence should come from watching the candidate taking the appropriate and necessary precautions to protect vehicles and loads from security risks during his or her normal duties. These precautions should be for different types of loads, in different types of locations, with the candidate understanding the security risks associated with the loads and locations. Evidence of the candidate taking appropriate and safe emergency or responsive action should also be collected where available. It should be confirmed that the candidate knows, understands and follows organisational procedures and guidelines for security. These include reporting theft or damage, as well as passing on suggestions for improving security.

Assessment of a candidate against this element should confirm consistent performance related to security of vehicles and loads. It will not be sufficient to collect evidence on a single occasion.

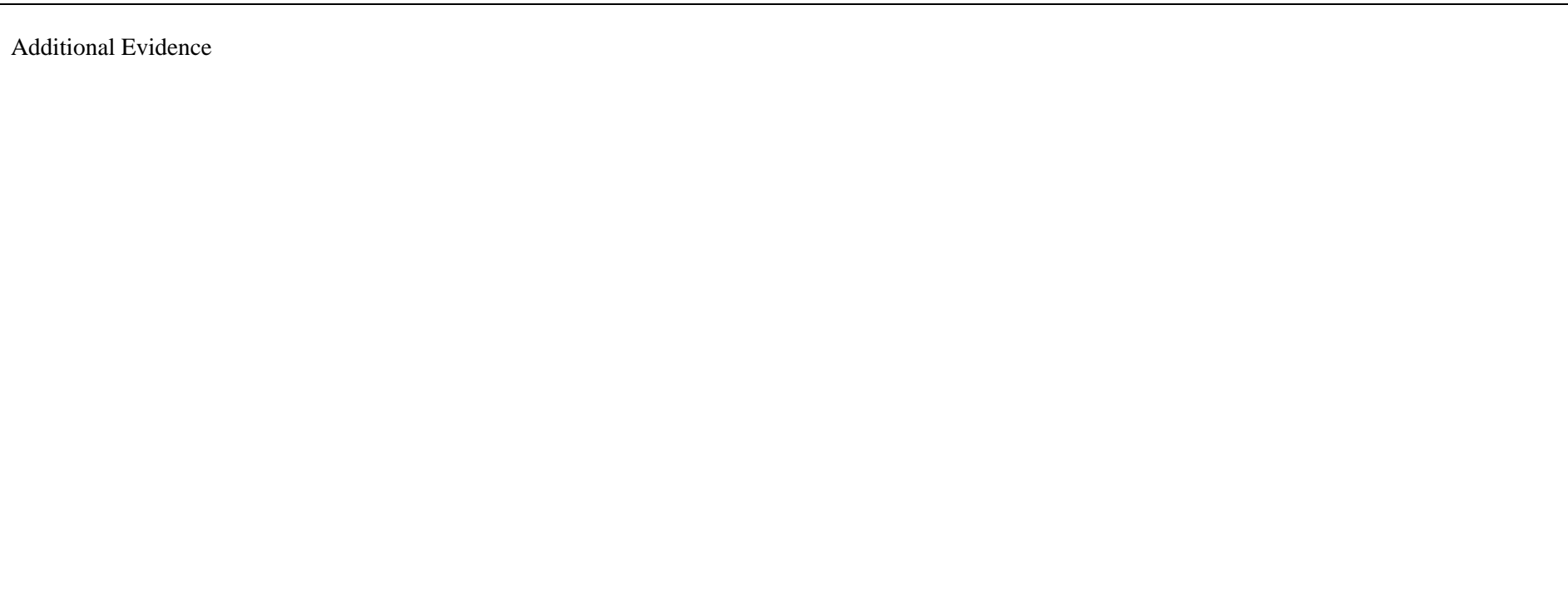
UNIT (CDG 2)

Maintaining the safety and the security of the load, self and property

Element 2 (2.2)

Protect the vehicle and load from security risks

Additional Evidence



The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (CDG 3) Contribute to the provision of customer service

This unit has the following elements:

Element 1 (3.1)	Develop and maintain effective relationships with customers
Element 2 (3.2)	Provide service related information to customers
Element 3 (3.3)	Assist in resolving customer complaints

Unit Summary

Element 1 Develop and maintain effective relationships with customers

You must be able to develop and maintain effective relationships with customers. You must take time to develop positive relationships with customers and communicate in a way that promotes goodwill and trust. You must also ensure that your appearance and conduct are consistent with the corporate image of your employer at all times. Any commitments you make to customers must be realistic, within the limits of your authority and can be met within operational constraints. If commitments cannot be met, you must communicate this to the customer in a way that maintains effective working relationships.

Element 2 Provide service related information to customers

You must be able to provide service related information to customers. You must acknowledge requests for information promptly and provide sufficient information to meet the customer's needs. You must ensure that your information is relevant, accurate, up to date and reflects organisational policy, and is presented in a manner which aids understanding and maintains an effective relationship with the customer. You must promptly refer requests that are outside the limits of your authority to the relevant people and ensure that you maintain confidentiality at all times.

Element 3 Assist in resolving customer complaints

You must be able to assist in resolving customer complaints. You must ensure that your communication with the customer regarding complaints is conducted in a polite manner and accurately establish the nature of the complaint. You must be able to propose actions in response to complaints that have been received and ensure these actions are verified with the customer in a manner that maintains effective relationships. Actions you take in response to a complaint must be within the limits of your authority, and complaints and your actions to those complaints must be recorded accurately and reported promptly to the relevant person.

UNIT (CDG 3)

Contribute to the provision of customer service

Element 1 (3.1)

Develop and maintain effective relationships with customers

Performance Criteria

You must be able to :

- 1 Take time, within operational constraints, to develop positive relationships with customers
- 2 **Communicate** in a manner which promotes confidence, goodwill and trust
- 3 Ensure that your appearance and conduct are consistent with the corporate image at all times
- 4 Ensure that commitments made to customers are realistic, within the limits of your own authority and are met within operational constraints
- 5 Communicate with the customer in a way that maintains effective working relationships if commitments cannot be met

Knowledge and Understanding

You must know and understand:

- a) the organizational policy on developing and maintaining effective relationships with customers
- b) the range and essential features of services available, and how these relate to customer requirements
- c) how operational constraints impact on service provision
- d) the importance of establishing the position and authority of the customer
- e) what the corporate image is, and why it is important to promote it positively
- f) the limits of your own authority and the consequences of operating outside these limits
- g) the communication structures and procedures within your organisation
- h) the importance of effective communication and the implications of not communicating effectively

UNIT (CDG 3)

Contribute to the provision of customer service

Element 1 (3.1)

Develop and maintain effective relationships with customers

Evidence requirements

The assessor should be confident that the outcomes have been produced by competent performance and that the candidate is capable of repeating competent performance. Evidence of competency will probably be collected over a period of time in the normal work environment or under similar conditions. Those providing witness testimony must be occupationally competent and reliable to recognise and support the evidence of competence for the candidate.

For this element evidence will be primarily from performance and outcome of performance, supported by witness testimony and questioning. The candidate will need to have knowledge and understanding of the organisational complaints procedure and the consequences of not following this procedure. They will also need to understand the importance of establishing the position and authority of the person making the complaint. They will need to know the range and essential features of services available, and how these relate to customer requirements. They will also need to understand how operational constraints can affect the service provided. Candidates will need to know the limits of their authority and the possible consequences of operating outside these limits. They will need to know why accurate and complete documentation is important, and the possible consequences of incorrect completion. They will also need to know and understand the communication structures and procedures within the organisation and the importance of effective communication and the implications of not communicating effectively.

The assessor must ascertain that the candidate has a clear understanding of legislation, regulations and codes of practice relating to the work being carried out.

When assessing knowledge and understanding it would be expected that any questioning would be recorded

Evidence should come from observing the candidate during his or her normal and typical work activities. The assessor must ensure that **communication is** spoken and written accurately and in the appropriate manner to assist in resolving customer complaints.

Evidence from records produced and maintained by the candidate on current and previous work done relevant to assisting in resolving customer complaints should also be readily available for the assessor to inspect.

UNIT (CDG 3)

Contribute to the provision of customer service

Evidence requirements (cont)

Evidence from personal statements for the whole unit needs to show that you are able to develop and maintain effective relationships with customers, provide customers with information and assisting in resolving any customer complaints. This would include:

- ◆ how you establish relationships with customers
- ◆ what your organisation's corporate image is and how you uphold that image
- ◆ how you show customers that you can be relied upon and that it is within your limits of authority
- ◆ what you do if commitments cannot be met, and to whom you communicate the problem to keep good working relationships with customers/clients
- ◆ how you provide information to customers/clients relevant to their needs
- ◆ what information you have to deal with
- ◆ how you communicate with a customer/client
- ◆ what procedures you follow to maintain confidentiality
- ◆ how you handle a complaint from a customer/client and what method of communication you use
- ◆ describe how your organisation follows up a complaint

The term 'customer' relates to external clients, people from other functions or departments within your own organisation, or anyone who depends on you for service.

UNIT (CDG 3)

Contribute to the provision of customer service

Element 1 (3.1)

Develop and maintain effective relationships with customers

Additional Evidence

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (CDG 3)

Contribute to the provision of customer service

Element 2 (3.2)

Provide service related information to customers

Performance Criteria

You must be able to:

- 1 Acknowledge requests for information promptly.
- 2 Provide sufficient **information** to meet the customer's needs.
- 3 Ensure that your information is relevant, accurate, up to date and reflects organisational policy.
- 4 Present information in a manner which aids understanding and maintains an effective relationship with the customer.
- 5 Promptly refer requests which are outside the limits of your authority to the relevant people.
- 6 Maintain confidentiality at all times.

Knowledge and Understanding

You must know and understand:

- a) the importance of good customer relations, and the consequences of failing to develop and maintain good customer relations
- b) the range and essential features of services available and how these relate to customer requirements
- c) the organisational policy on providing service related information to customers
- d) the importance of acknowledging requests for information promptly and the consequences of failing to do so
- e) why information must be relevant, accurate and up to date
- f) the correct manner in which to present information
- g) what to do when sufficient information to meet the customers needs is not immediately available
- h) the limits of your own authority and the consequences of operating outside these limits
- i) the communication structures and procedures within your organisation
- j) the type of customer request that must be referred to others in the organisation
- k) the importance of prompt referrals and informing the customer of such action
- l) the importance of maintaining confidentiality at all times
- m) the consequences of breaches of confidentiality
- n) the importance of effective communication and the implications of not communicating effectively
- o) the range of customers likely to be encountered, and the concept of an internal customer

UNIT (CDG 3)

Contribute to the provision of customer service

Element 2 (3.2)

Provide service related information to customers

Evidence requirements

The assessor should be confident that the outcomes have been produced by competent performance and that the candidate is capable of repeating competent performance. Evidence of competency will probably be collected over a period of time in the normal work environment or under similar conditions. Those providing witness testimony must be occupationally competent and reliable to recognise and support the evidence of competence for the candidate.

For this element evidence will be primarily from performance and outcome of performance, supported by witness testimony and questioning. The candidate will need to have knowledge and understanding of the importance of good customer relations, and the consequences of failing to develop and maintain good customer relations. They will need to know the range and essential features of services available and how these relate to customer requirements. They will also need to know the organisational policy on providing service related information to customers. The candidate will need to understand the importance of acknowledging requests for information promptly and the consequences of failing to do so, why information must be relevant, accurate and up to date and they will need to know the correct manner in which to present information. The candidate will need to know what to do when sufficient information to meet customer needs is not immediately available, and the limits of your own authority and the consequences of operating outside these limits. They will also need to know and understand the communication structures and procedures within the organisation. The candidate will need to know the type of customer request, which must be referred to others in the organisation, the importance of prompt referrals and informing the customer of such action. They will need to know the importance of maintaining confidentiality at all times and the consequences of breaches of confidentiality. They will also need to know and understand the importance of effective communication and the implications of not communicating efficiently, what range of customers are likely to be encountered, and the concept of an internal customer.

The assessor must ascertain that the candidate has a clear understanding of legislation, regulations and codes of practice relating to the work being carried out.

When assessing knowledge and understanding it would be expected that any questioning would be recorded

Evidence should come from observing the candidate during his or her normal and typical work activities. The assessor must see how **information is provided** both orally and in writing and it should be evident that the candidate can provide service related information to customers.

Evidence from records produced and maintained by the candidate on current and previous work done relevant to the provision of service related information to customers should also be readily available for the assessor to inspect.

UNIT (CDG 3)

Contribute to the provision of customer service

Evidence requirements (cont)

Evidence from personal statements for the whole unit needs to show that you are able to develop and maintain effective relationships with customers, provide customers with information and assisting in resolving any customer complaints. This would include:

- ◆ how you establish relationships with customers
- ◆ what your organisation's corporate image is and how you uphold that image
- ◆ how you show customers that you can be relied upon and that it is within your limits of authority
- ◆ what you do if commitments cannot be met, and to whom you communicate the problem to keep good working relationships with customers/clients
- ◆ how you provide information to customers/clients relevant to their needs
- ◆ what information you have to deal with
- ◆ how you communicate with a customer/client
- ◆ what procedures you follow to maintain confidentiality
- ◆ how you handle a complaint from a customer/client and what method of communication you use
- ◆ describe how your organisation follows up a complaint

The term 'customer' relates to external clients, people from other functions or departments within your own organisation, or anyone who depends on you for service.

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UNIT (CDG 3)

Contribute to the provision of customer service

Element 2 (3.2)

Provide service related information to customers

Additional Evidence

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (CDG 3)

Contribute to the provision of customer service

Element 3 (3.3)

Assist in resolving customer complaints

Performance Criteria

You must be able to:

- 1 Ensure that your communication with the customer regarding complaints is conducted in a polite manner.
- 2 Accurately establish the nature of the complaint.
- 3 Propose actions in response to complaints that have been received and ensure these actions are verified with the customer in a manner that maintains effective relationships.
- 4 Ensure that the actions you take in response to complaints received are within the limits of your own authority.
- 5 Record complaints accurately and report them promptly to the relevant person.

Knowledge and Understanding

You must know and understand:

- a) your organisational complaints procedure and the consequences of not following procedure
- b) the importance of establishing the position and authority of the person making the complaint
- c) the range and essential features of services available, and how these relate to customer requirements
- d) how operational constraints can affect the services provided
- e) the limits of your own authority and the consequences of operating outside these limits
- f) why accurate and complete documentation is important, and the possible consequences of incorrect completion
- g) the communication structures and procedures within your organisation
- h) the importance of effective communication and the implications of not communicating effectively

UNIT (CDG 3)

Contribute to the provision of customer service

Element 3 (3.3)

Assist in resolving customer complaints

Evidence requirements

The assessor should be confident that the outcomes have been produced by competent performance and that the candidate is capable of repeating competent performance. Evidence of competency will probably be collected over a period of time in the normal work environment or under similar conditions. Those providing witness testimony must be occupationally competent and reliable to recognise and support the evidence of competence for the candidate.

For this element evidence will be primarily from performance and outcome of performance, supported by witness testimony and questioning. The candidate will need to have knowledge and understanding of the organisational complaints procedure and the consequences of not following this procedure. They will also need to understand the importance of establishing the position and authority of the person making the complaint. They will need to know the range and essential features of services available, and how these relate to customer requirements. They will also need to understand how operational constraints can affect the service provided. Candidates will need to know the limits of their authority and the possible consequences of operating outside these limits. They will need to know why accurate and complete documentation is important, and the possible consequences of incorrect completion. They will also need to know and understand the communication structures and procedures within the organisation and the importance of effective communication and the implications of not communicating effectively

The assessor must ascertain that the candidate has a clear understanding of legislation, regulations and codes of practice relating to the work being carried out.

When assessing knowledge and understanding it would be expected that any questioning would be recorded

Evidence should come from observing the candidate during his or her normal and typical work activities. The assessor must ensure that **communication is** spoken and written accurately and in the appropriate manner to assist in resolving customer complaints.

Evidence from records produced and maintained by the candidate on current and previous work done relevant to assisting in resolving customer complaints should also be readily available for the assessor to inspect.

UNIT (CDG 3)

Contribute to the provision of customer service

Element 3 (3.3)

Assist in resolving customer complaints

Evidence requirements (cont)

Evidence from personal statements for the whole unit needs to show that you are able to develop and maintain effective relationships with customers, provide customers with information and assisting in resolving any customer complaints. This would include:

- ◆ how you establish relationships with customers
- ◆ what your organisation's corporate image is and how you uphold that image
- ◆ how you show customers that you can be relied upon and that it is within your limits of authority
- ◆ what you do if commitments cannot be met, and to whom you communicate the problem to keep good working relationships with customers/clients
- ◆ how you provide information to customers/clients relevant to their needs
- ◆ what information you have to deal with
- ◆ how you communicate with a customer/client
- ◆ what procedures you follow to maintain confidentiality
- ◆ how you handle a complaint from a customer/client and what method of communication you use
- ◆ describe how your organisation follows up a complaint

The term 'customer' relates to external clients, people from other functions or departments within your own organisation, or anyone who depends on you for service.

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UNIT (CDG 3)

Contribute to the provision of customer service

Element 3 (3.3)

Assist in resolving customer complaints

Additional Evidence

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (CDG 4) Complete pre-journey and post-journey procedures

This unit has the following elements:

Element 1 (4.1)	Carry out pre-journey procedures
Element 2 (4.2)	Carry out end of journey close-down procedures
Element 3 (4.3)	Carry out end of journey debrief procedures

Unit Summary

Element 1 Carry out pre-journey procedures

You must be able to carry out pre-journey procedures. You will know how to correctly identify the vehicle and equipment for the load to be transported and will carry out pre operational procedures relevant to the type of vehicle and equipment to be used in accordance with relevant legislation, regulation and codes of practice. **The vehicle type is any vehicle used for the movement of loads by road. The load is any goods moved by road.** You must complete all pre-journey documentation, and also know the procedures and documentation for reporting damage or defects found during the pre-journey inspection and will understand the importance of the vehicle and equipment being free from contaminants and the health and safety issues that could arise from such situations. You will know how to prepare the vehicle to maximise environmental efficiency eg by correctly setting any air deflectors and other environmental devices fitted.

Element 2 Carry out end of journey close-down procedures

You must be able to carry out end of journey close-down procedures. You will need to refuel the vehicle in accordance with the manufacturers operating instructions if required. **The vehicle type is any vehicle used for the movement of loads by road.** Park the vehicle in a safe and secure position ready to drive away and shut the vehicle down in accordance with manufacturers operating instructions. Ensure the vehicles parking brake system is applied, any items of value are removed or stowed away. Activate or apply any security devices and leave the vehicle safely. Inspect the vehicle for any damage or maintenance defects and report them in accordance with operational and organisational procedures.

Element 3 Carry out end of journey debrief procedures

You must be able to carry out end of journey debrief procedures. You will need to ensure that all collections and deliveries of loads have been completed in accordance with the schedule. **The load is any goods transported by road.** All the relevant documentation should then be checked and returned to the appropriate office. End of journey debrief procedures should be completed in accordance with operational and organisational procedures eg driver's records, vehicle defect or accident report sheets. **The vehicle type is any vehicle used for the movement of loads by road.** You will report any customer feedback to the relevant personnel. You will need to ensure the relevant legislation, regulation and codes of practice are complied with according to the type of vehicle used.

UNIT (CDG 4)

Complete pre-journey and post-journey procedures

Element 1 (4.1)

Carry out pre-journey procedures

Performance Criteria

You must be able to:

- 1 Identify the vehicle and equipment being used for transporting the load.
- 2 Carry out pre journey inspections on the vehicle in accordance with manufacturers instructions and relevant legislation, regulation and codes of practice.
- 3 Complete all pre-journey documentation.
- 4 Prepare and set up the vehicle to optimise performance and efficiency for the journey.
- 5 Confirm the safety and security of loads in accordance with relevant legislation, regulation and approved codes of practice.
- 6 Confirm vehicle and loads are protected and free from contamination and damage in accordance with manufacturers and industry guidelines.
- 7 Determine appropriate action to resolve any problems or difficulties found with the vehicle or the load.
- 8 Report and record any defects or damage in accordance with operational and organisational procedures.

Knowledge and Understanding

You must know and understand:

- a) type of load for delivery or collection
- b) type of vehicle transporting the load
- c) relevant legislation regulation and codes of practice related to pre journey inspections
- d) health and safety issues relating to contamination of vehicles and loads
- e) environmental issues relating to aerodynamics and driving efficiency
- f) Manufacturers and industry guidelines for preventing contamination and damage to the goods in transport
- g) Operational and organisational procedures for reporting and recording damage and defects
- h) The relevant legislation, regulation and codes of practice for loading and unloading eg distribution and re-distribution, restraints and protection of loads
- i) Methods of communication eg oral, written, electronic
- j) Documentation systems for pre-journey procedures

UNIT (CDG 4) Complete pre-journey and post-journey procedures

Element 1 (4.1) Carry out pre-journey procedures

Evidence requirements

The assessor should be confident that the outcomes have been produced by competent performance and that the candidate is capable of repeating competent performance. Evidence of competency will probably be collected over a period of time in the normal work environment or under similar conditions. Those providing witness testimony must be occupationally competent and reliable to recognise and support the evidence of competence for the candidate.

For this element primary evidence will be performance and outcome of performance, supported by questioning and witness testimony. The candidate will need to have knowledge and understanding of pre-journey procedures for the transportation of loads, they will need to know the type of load and the type of vehicle being used to transport the load. They will need to be aware of any health and safety issues relating to contamination of vehicles and loads and guidelines for preventing contamination of the goods during transport. They will also need to know the documentation and papers involved with pre-journey procedures.

The assessor must ascertain that the candidate has a clear understanding of legislation, regulations and codes of practice for pre-journey procedures relating to the industry and the transportation of loads.

Evidence should come from observing the candidate during his or her normal and typical work activities when carrying out pre-journey procedures. It should be evident that the candidate carries out pre-journey inspections on the vehicle and can set up the vehicle to optimise fuel efficiency during the journey taking into account the type of load and method of distribution for the load. The assessor will need to see that the candidate ensures the safety and security of the loads and takes into account any risks of contamination or damage relevant to the type of load being transported. The assessor will also need to see pre-journey documentation and papers completed for the transportation of the loads and that the candidate communicates these following the approved procedure.

Evidence from records produced and maintained by the candidate on current and previous work done on pre-journey procedures should also be readily available for the assessor to inspect

When assessing knowledge and understanding it would be expected that any questioning would be recorded

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UNIT (CDG 4)

Complete pre-journey and post-journey procedures

Element 1 (4.1)

Carry out pre-journey procedures

Additional Evidence

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (CDG 4)

Complete pre-journey and post-journey procedures

Element 2 (4.2)

Carry out end of journey close-down procedures

Performance Criteria

You must be able to:

- 1 Refuel the vehicle when required in accordance with manufacturers operating instructions and operational and organisational procedures.
- 2 Park the vehicle in a safe and secure position ready to drive away.
- 3 Shut down vehicle in accordance with manufacturers operating instructions.
- 4 Ensure the vehicle's braking system is applied for parking in accordance with manufacturers operating instructions.
- 5 Remove or stow away any items of value and activate any security devices in accordance with manufacturers operating instructions.
- 6 Check the vehicle for any damage or maintenance defects and report them in accordance with operational and organisational procedures.

Knowledge and Understanding

You must know and understand:

- a) types of vehicles
- b) relevant manufacturers operating instructions
- c) refuelling operational and organisational procedures
- d) security implications when parking
- e) health and safety issues relevant to the vehicle
- f) relevant legislation regulation and codes of practice related to end of journey close down procedures
- g) operational and organisational procedures for reporting and recording damage and defects
- h) methods of communication eg oral, written, electronic

UNIT (CDG 4) Complete pre-journey and post-journey procedures

Element 2 (4.2) Carry out end of journey close-down procedures

Evidence requirements

The assessor should be confident that the outcomes have been produced by competent performance and that the candidate is capable of repeating competent performance. Evidence of competency will probably be collected over a period of time in the normal work environment or under similar conditions. Those providing witness testimony must be occupationally competent and reliable to recognise and support the evidence of competence for the candidate.

For this element primary evidence will be performance and outcome of performance, supported by questioning and witness testimony. The candidate will need to have knowledge and understanding of end of journey close-down procedures for the vehicle. They will need to know the type of vehicle being used and they will need to be aware of any health and safety issues relating to the vehicle. The candidate will also need to know the methods of communication used to report and inform of end of journey and on the condition of the vehicle.

The assessor must ascertain that the candidate has a clear understanding of legislation, regulations and codes of practice related to end of journey close-down procedures.

Evidence should come from observing the candidate during his or her normal and typical work activities when carrying out end of journey close-down procedures. It should be evident that the candidate can refuel the vehicle, shut down the vehicle correctly and position and park up the vehicle safely and securely. The candidate will need to demonstrate what checks are made on the vehicle relevant to the type of vehicle and the manufacturers instructions. The assessor will need to see security procedures for items of value and for the vehicle, also observe the means of communication used to inform of the end of journey and close-down.

When assessing knowledge and understanding it would be expected that any questioning would be recorded.

UNIT (CDG 4)

Complete pre-journey and post-journey procedures

Element 2 (4.2)

Carry out end of journey close-down procedures

Additional Evidence

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (CDG 4)

Complete pre-journey and post-journey procedures

Element 3 (4.3)

Carry out end of journey debrief procedures

Performance Criteria

You must be able to:

- 1 Confirm the load has been collected or delivered in accordance with the schedule.
- 2 Confirm that all the necessary documentation has been completed and signed by the relevant personnel and copies returned to the appropriate office
- 3 Complete driver's records and ensure they comply with relevant legislation, regulation and codes of practice.
- 4 Report any damage or road traffic accidents to the relevant personnel in accordance with operational and organisational procedures.
- 5 Complete a vehicle defect report where appropriate in accordance with operational and organisational procedures.
- 6 Report any customer feedback in accordance with operational and organisational procedures.

Knowledge and Understanding

You must know and understand:

- a) type of load delivered or collected
- b) type of vehicle transporting the load
- c) documentation systems and procedures
- d) relevant legislation, regulation and codes of practice eg driver's hours
- e) vehicle defect recording procedures
- f) operational and organisational procedures for reporting and recording damage and defects
- g) methods of communication eg oral, written, electronic

UNIT (CDG 4) Complete pre-journey and post-journey procedures

Element 3 (4.3) Carry out end of journey debrief procedures

Evidence requirements

The assessor should be confident that the outcomes have been produced by competent performance and that the candidate is capable of repeating competent performance. Evidence of competency will probably be collected over a period of time in the normal work environment or under similar conditions. Those providing witness testimony must be occupationally competent and reliable to recognise and support the evidence of competence for the candidate.

For this element primary evidence will be performance and outcome of performance, supported by questioning and witness testimony. The candidate will need to have knowledge and understanding of end of journey debrief procedures. They will need to know the type of load delivered or collected and the type of vehicle transporting the load. The candidate will also need to know documentation systems and procedures and the methods of communication used to report and inform of end of journey and debriefing.

The assessor must ascertain that the candidate has a clear understanding of legislation, regulations and codes of practice related to end of journey debrief procedures for the load, the vehicle and the driver.

Evidence should come from observing the candidate during his or her normal and typical work activities when carrying out end of journey debrief procedures. It should be evident that the candidate can complete the documentation and papers relevant to the collection and delivery of loads, correctly signed and returned as required. They will also need to complete forms and papers relating to drivers hours and the use and condition of the vehicle according to recognised operational procedure. The assessor will need to observe the means of communication used to inform of the end of journey and debriefing.

Evidence from records produced and maintained by the candidate on current and previous work done for end of journey and debriefing when transporting goods by road should also be readily available for the assessor to inspect

When assessing knowledge and understanding it would be expected that any questioning would be recorded.

UNIT (CDG 4)

Complete pre-journey and post-journey procedures

Element 3 (4.3)

Carry out end of journey debrief procedures

Additional Evidence

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (CDG 5) Planning the route and timings for the delivery and collection of loads

This unit has the following element:

Element 1 (5.1)	Identify a route to the destination
Element 2 (5.2)	Estimate driving distances and times for the route
Element 3 (5.3)	Plan driving stages

Unit Summary

Element 1 Identify a route to the destination

The candidate should be able to work out and select suitable routes to specific delivery and collection destinations. This should be done by using appropriate maps and other relevant information. The selection of routes should take account of the type of loads being transported, which could be *containers, liquids, goods, materials or livestock*. Selection of the route should also take account of the vehicle being driven and the types of road used. Other routes should also be identified, should it be necessary to use an alternative. The candidate should be able to identify and avoid possible problems caused by restrictions such as low bridges, or weight limits. The candidate will also need to know and keep to the relevant legal, safety and operating requirements associated with selecting routes for delivering or collecting loads.

Element 2 Estimate driving distances and times for the route

The candidate should be able to estimate driving distances and times for routes to deliver or collect loads. This should be done by using sufficient relevant information about the routes and schedules, as well as any other useful information. As schedules could indicate collection times, delivery times or stops, the candidate should be able to estimate possible average speeds for the different types of road, as well as estimate driving distances and times to meet the schedules. The candidate will also need to know and keep to the relevant legal, safety and operating requirements associated with driving distances and times.

Element 3 Plan driving stages

The candidate should be able to plan the driving stages of routes to deliver or collect loads. This should be done by using sufficient relevant information about driving distances, times and stops. The stops could be for *overnight, rest, refuelling or changeover of drivers*. Planning should also take account of any impact the load will have on the driving stages. The candidate should therefore know what type of load requirements could affect driving stages. These types of loads could be *containers, liquids, goods, materials or livestock*. While planning driving stages, the candidate should make the best use of available driving time, as well as make sure the planned stops have the facilities required for driver, vehicle and load. Where details of driving stages are to be given to others, then these should be given clearly. The candidate will also need to know and keep to the relevant legal, safety and operating requirements associated with driving stages.

UNIT (CDG 5)

Planning the route and timings for the delivery and collection of loads

Element 1 (5.1)

Identify a route to the destination

Performance Criteria

You must be able to:

- 1 Review all relevant information on the **destination**.
- 2 Identify any effect the **load** might have on the selection of the route.
- 3 Obtain relevant maps and information needed to reach the destination.
- 4 Identify the main and minor roads for reaching the destination.
- 5 Identify any potential problems with using the roads.
- 6 Identify alternative routes where necessary.
- 7 Comply with all relevant **legal, safety, and operating requirements**.

Knowledge and Understanding

You must know and understand:

- a) how to obtain relevant maps and information
- b) what type of effect a load might have on the selection of a route
- c) what is the vehicle height and weight
- d) how to identify low bridges and other restrictions
- e) how to work out routes; and
- f) what are the relevant legal, safety, and operating requirements

UNIT (CDG 5)

Planning the route and timings for the delivery and collection of loads

Element 1 (5.1)

Identify a route to the destination

Evidence requirements

In order to make a fair assessment decision, the assessor must be certain that the candidate produced the evidence being used, and is capable of repeating competent performance. Evidence of competency will probably be collected over a period of time in the normal work place, or under similar conditions.

Evidence should come from the candidate's records of routes to typical specified destinations for collecting or delivering loads. These routes could be for actual journeys, or journeys specified for assessment purposes. The candidate will be asked how the type of vehicle, loads and roads were taken into account when selecting these routes. The assessor will make sure that the candidate is able to identify any possible problems related to height or weight restrictions on routes and how these were dealt with. The assessor will also confirm that the candidate knows about the laws, regulations and restrictions associated with routes used to transport loads.

As assessment will be carried out over a period of time, the assessor will make sure the candidate can identify and select suitable routes for collecting or delivering typical loads. It will not be sufficient to get evidence about just one collection or delivery, or journey.

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UNIT (CDG 5)

Planning the route and timings for the delivery and collection of loads

Element 1 (5.1)

Identify a route to the destination

Additional Evidence

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (CDG 5)

Planning the route and timings for the delivery and collection of loads

Element 2 (5.2)

Estimate driving distances and times for the route

Performance Criteria

You must be able to:

- 1 Review all relevant information on the route and the **schedule**.
- 2 Obtain all relevant information needed to estimate the driving distance.
- 3 Identify the potential average speed for the different roads on the route.
- 4 Estimate the driving distances and time required to achieve the route and schedule.
- 5 Comply with all relevant **legal, safety, and operating requirements**.

Knowledge and Understanding

You must know and understand:

- a) how to obtain relevant information on the route
- b) how to estimate driving distances
- c) how to estimate driving times
- d) what the relevant legal, safety, and operating requirements are for the vehicle and the load

UNIT (CDG 5)

Planning the route and timings for the delivery and collection of loads

Element 2 (5.2)

Estimate driving distances and times for the route

Evidence requirements

In order to make a fair assessment decision, the assessor must be certain that the candidate produced the evidence being used, and is capable of repeating competent performance. Evidence of competency will probably be collected over a period of time in the normal work place, or under similar conditions.

Evidence should come from examples of the candidate's estimates of driving distances and times for typical routes to deliver or collect loads. These examples could be of actual routes, or routes specified for assessment purposes. The candidate will be asked what information was used to make these estimations and what legal, safety and operating requirements needed to be met.

As assessment will be carried out over a period of time, the assessor will make sure the candidate estimates driving distances and times for typical routes to collect or deliver loads. It will not be sufficient to get evidence about just one collection, delivery, or journey.

UNIT (CDG 5)

Planning the route and timings for the delivery and collection of loads

Element 2 (5.2)

Estimate driving distances and times for the route

Additional Evidence

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (CDG 5)

Planning the route and timings for the delivery and collection of loads

Element 3 (5.3)

Plan driving stages

Performance Criteria

You must be able to:

- 1 Review all relevant information on the driving distances and times.
- 2 Identify any **load** requirements that have an impact on the driving stages.
- 3 Determine the most effective way to use the available driving time.
- 4 Identify appropriate **stops** that have the facilities required for self, vehicle, and load.
- 5 Inform the relevant people of the driving stages.
- 6 Comply with all relevant **legal, safety, and operating requirements**.

Knowledge and Understanding

You must know and understand:

- a) how to obtain relevant information on the driving distances and times
- b) what type of load requirements could affect the driving stages
- c) when stops might be required
- d) what type of facilities are required at stops
- e) what the relevant legal, safety, and operating requirements are for the vehicle and the load

UNIT (CDG 5)

Planning the route and timings for the delivery and collection of loads

Element 3 (5.3)

Plan driving stages

Evidence requirements

In order to make a fair assessment decision, the assessor must be certain that the candidate produced the evidence being used, and is capable of repeating competent performance. Evidence of competency will probably be collected over a period of time in the normal work place, or under similar conditions.

Evidence should come from examples of the candidate's plans for driving stages. These plans should be based on specified driving distances and times for typical routes to deliver or collect loads. These examples could be of actual routes, or routes specified for assessment purposes. The candidate will be asked what load requirements were taken into account in the planning, what facilities were required and identified at stops, and how the most effective use of driving time was achieved. The candidate will also be asked how legal, safety and operating requirements will be met.

As assessment will be carried out over a period of time, the assessor will make sure the candidate plans driving stages for typical routes to collect or deliver loads. It will not be sufficient to get evidence about just one collection, delivery, or journey.

UNIT (CDG 5)

Planning the route and timings for the delivery and collection of loads

Element 3 (5.3)

Plan driving stages

Additional Evidence

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (CDG 6) Transport goods and materials

This unit has the following element:

Element 1 (6.1) Operate and control a laden vehicle
Element 2 (6.2) Monitor and review progress

Unit Summary

Element 1 Operate and control a laden vehicle

You must be able to operate and control a laden vehicle. You must correctly establish the stability of the load before moving the vehicle and then manoeuvre the vehicle in a safe, effective and controlled manner. You must drive the vehicle in a way that optimises fuel consumption and minimises wear and tear and the risk of accidental damage. You must constantly display an awareness of, and consideration for, the actions of others and the loads you carry. Any hazards within your work area must be accurately identified and any necessary remedial actions taken promptly, minimising the risk of accident, damage and disruption to vehicles, property and other road users. You must also correctly secure the vehicle and its load when it is left unattended. Your operation and control of your vehicle must be in accordance with all relevant regulations.

Element 2 Monitor and review progress

You must be able to monitor and review progress. You must be able to establish any variance in vehicle performance and load condition, and if any is found, investigate and remedy it within the limits of your authority and record and report the details to the relevant person. You must correctly follow established procedures in the event of an accident, breakdown or any other problems that may arise. Any potential and actual significant deviations from the operating schedule must be accurately identified, and any decisions you take to amend the agreed route must be within the limits of your own authority and communicated promptly to the relevant person. You must ensure that your monitoring and reviewing of progress is in accordance with all relevant regulations.

UNIT (CDG 6) Transport goods and materials

Element 1 (6.1) Operate and control a laden vehicle

Performance Criteria

You must be able to:

- 1 Correctly establish the stability of the load prior to moving the vehicle.
- 2 Manoeuvre the vehicle in a safe, effective and controlled manner.
- 3 Drive the vehicle in a way that optimises fuel consumption within operational constraints.
- 4 Drive the vehicle in a way that minimises wear and tear and risk of accidental damage.
- 5 Constantly display an awareness of, and consideration for, the action of others.
- 6 Constantly display an awareness of, and consideration for, the loads you carry.
- 7 Accurately identify any hazards within your work area and take any remedial action needed promptly.
- 8 Take remedial action that minimises the risk of accident, damage and disruption to vehicles, property and other road users.
- 9 Correctly secure the vehicle and its load when the vehicle is left unattended.
- 10 Operate and control your vehicle in accordance with all relevant regulations.

Knowledge and Understanding

You must know and understand:

- a) why it is necessary to establish the stability of the load
- b) how the vehicle controls and equipment function and operate
- c) the characteristics, capabilities and handling of the vehicle
- d) the techniques of safe driving and manoeuvring
- e) the importance of optimising vehicle performance
- f) the characteristics of the load, and problems that could occur in transit
- g) what remedial action to take when hazards occur
- h) the relevant regulations that affect vehicle operation and control, and how to apply them
- i) the highway code

UNIT (CDG 6) Transport goods and materials

Element 1 (6.1) Operate and control a laden vehicle

Evidence requirements

The assessor should be confident that the outcomes have been produced by competent performance and that the candidate is capable of repeating competent performance. Evidence of competency will probably be collected over a period of time in the normal work environment or under similar conditions. Those providing witness testimony must be occupationally competent and reliable to recognise and support the evidence of competence for the candidate.

For this element evidence will be primarily from performance and outcome of performance, supported by witness testimony and questioning. The candidate will need to have knowledge and understanding of why it is necessary to establish the stability of the load. They will need to know how vehicle controls and equipment function and operate and the characteristics, capabilities and handling of the vehicle. They will need to know the techniques of safe driving and manoeuvring and the importance of optimising vehicle performance. They will need to know and understand the characteristics of the load, and the problems, which may occur in transit. The candidate will need to know what remedial action to take in the event of hazards occurring, They will also need to know the relevant regulations which affect vehicle operation and control, and how to apply them and the candidate will need to have knowledge of the Highway Code.

The assessor must ascertain that the candidate has a clear understanding of legislation, regulations and codes of practice relating to the work being carried out.

When assessing knowledge and understanding it would be expected that any questioning would be recorded

Evidence should come from observing the candidate during his or her normal and typical work activities. The assessor must ensure that the candidate can operate and control a laden vehicle and this would include that they can take appropriate remedial actions to deal with **hazards** human, environmental and structural.

Evidence from records produced and maintained by the candidate when transporting goods and materials by road (tachograph discs, completed journey logs etc.) including a valid driving licence should also be readily available for the assessor to inspect.

Evidence from personal statements for the whole unit should explain how you drive your vehicle to ensure maximum economy and minimum wear and tear. This would include:

- ◆ how you consider other road users
- ◆ what you do to ensure your load is safe
- ◆ describe the rules you must follow whilst driving eg highway code, drivers hours etc

UNIT (CDG 6)

Transport goods and materials

Evidence requirements (cont)

- ◆ what types of hazards you may encounter within your work area
- ◆ what measures you take when leaving your vehicle
- ◆ if your vehicle is not performing correctly, what procedures do you follow
- ◆ explain the procedures you follow if you are involved in an accident
- ◆ who you contact if your vehicle breaks down or you are not running to schedule

Special Notes

- ◆ Prior to the assessment of this element, assessors must satisfy themselves that the candidate holds a valid Department of Transport Driving Licence, appropriate to the vehicle(s) to be used.
- ◆ Assessors must have equal driving competence themselves i.e. they must hold the appropriate vehicle licence.
- ◆ Evidence presented must identify the category and loaded state of the vehicle(s) and the type of roads on which the assessments took place.

UNIT (CDG 6)

Transport goods and materials

Element 1 (6.1)

Operate and control a laden vehicle

Additional Evidence

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (CDG 6)

Transport goods and materials

Element 2 (6.2)

Monitor and review progress

Performance Criteria

You must be able to:

- 1 Accurately establish any variance in vehicle performance and load condition.
- 2 Investigate any variance, remedy it within the limits of your own authority and record and report the details to the relevant person.
- 3 Correctly follow established procedures in the event of an accident, breakdown or any other **problems** that may arise.
- 4 Accurately identify actual and potential significant deviations from the operating schedule.
- 5 Take decisions to amend the agreed route within the limits of your own authority and communicate them correctly to the relevant person.
- 6 Ensure that any actions you take when the operating schedule cannot be followed are within the limits of your authority and are promptly communicated.
- 7 Ensure that your monitoring and review of progress meets all regulations.

Knowledge and Understanding

You must know and understand:

- a) the nature and characteristics of the load and their effect on vehicle performance
- b) the procedures for dealing with problems that occur
- c) how deviations from the operating schedule will impact on operations
- d) the limits of your own authority and the consequences of operating outside these limits
- e) the regulations that affect the transport of goods and materials and how to apply them
- f) the communication structures and procedures within your organisations
- g) the importance of effective communication and what could happen if you do not communicate effectively
- h) what an operating schedule covers

UNIT (CDG 6) Transport goods and materials

Element 2 (6.2) Monitor and review progress

Evidence requirements

The assessor should be confident that the outcomes have been produced by competent performance and that the candidate is capable of repeating competent performance. Evidence of competency will probably be collected over a period of time in the normal work environment or under similar conditions. Those providing witness testimony must be occupationally competent and reliable to recognise and support the evidence of competence for the candidate.

For this element evidence will be primarily from performance and outcome of performance, supported by witness testimony and questioning. The candidate will need to have knowledge and understanding of what the nature and characteristics of the load are and their effect on vehicle performance. They will need to know what the procedures are for dealing with problems, which occur. They will need to understand how deviations from the operating schedule will impact on operations. The candidate will need to know what the limits of their authority and the consequences of operating outside these limits. They will need to know about the regulations which affect the transport of goods and materials are and how to apply them. The candidate will need to know and understand what the communication structures and procedures are within the organisation and the importance of effective communication and what could happen if you do not communicate effectively. They will also need to know what an operating schedule covers

The assessor must ascertain that the candidate has a clear understanding of legislation, regulations and codes of practice relating to the work being carried out.

When assessing knowledge and understanding it would be expected that any questioning would be recorded

Evidence should come from observing the candidate during his or her normal and typical work activities. The assessor must ensure that the candidate can monitor and review progress when transporting goods by road. The candidate will need to demonstrate that they can deal with **problems arising** from inadequate performance of the vehicle, stability of load and deterioration of load. The candidate will also need to show how **monitoring** of vehicle performance and the load condition is carried out.

Evidence from records produced and maintained by the candidate when transporting goods and materials by road (tachograph discs, completed journey logs etc) including a valid driving licence should also be readily available for the assessor to inspect.

UNIT (CDG 6) Transport goods and materials

Evidence requirements (cont)

Evidence from personal statements for the whole unit should explain how you drive your vehicle to ensure maximum economy and minimum wear and tear. This would include:

- ◆ how you consider other road users
- ◆ what you do to ensure your load is safe
- ◆ describe the rules you must follow whilst driving eg highway code, drivers hours etc
- ◆ what types of hazards you may encounter within your work area
- ◆ what measures you take when leaving your vehicle
- ◆ if your vehicle is not performing correctly, what procedures do you follow
- ◆ explain the procedures you follow if you are involved in an accident
- ◆ who you contact if your vehicle breaks down or you are not running to schedule

Special Notes

- ◆ Prior to the assessment of this element, assessors must satisfy themselves that the candidate holds a valid Department of Transport Driving Licence, appropriate to the vehicle(s) to be used.
- ◆ Assessors must have equal driving competence themselves i.e. they must hold the appropriate vehicle licence.

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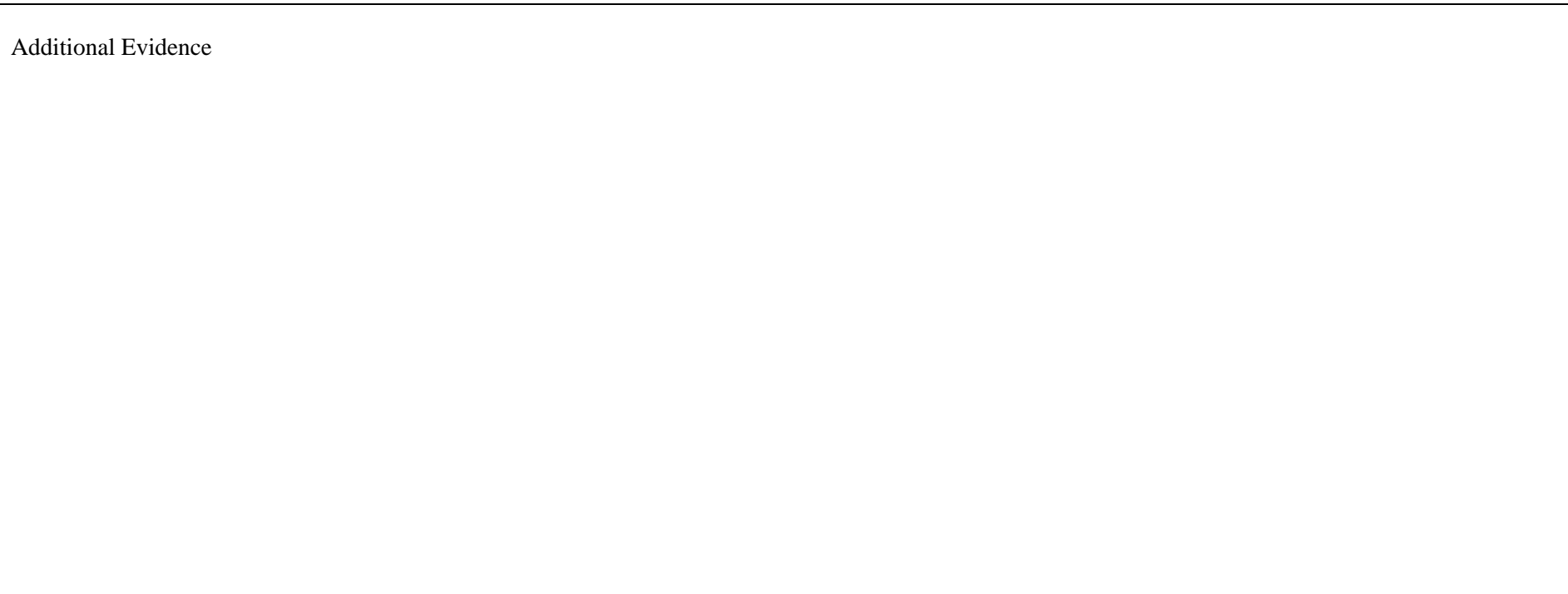
UNIT (CDG 6)

Transport goods and materials

Element 2 (6.2)

Monitor and review progress

Additional Evidence



The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (CDG 7) Handling goods and materials

This unit has the following element:

Element 1 (7.1)	Confirm load, location and time for collection or delivery
Element 2 (7.2)	Prepare to load or unload the vehicle
Element 3 (7.3)	Load or unload the vehicle

Unit Summary

Element 1 Confirm load, location and time for collection or delivery

You must be able to confirm load, location and time for collection or delivery. **The load is any goods moved by road.** You will need to identify any restrictions to movement at the location (eg height, width, other operational activities), and if there are any requirements for specialised equipment to carry out the loading or unloading. You will need to take account of relevant legislation, regulation and codes of practice including health, safety and environmental considerations. You will communicate with the relevant people and where necessary inform relevant authorities of transportation of specialist / abnormal loads. Report and record any difficulties that are identified with the delivery or collection schedule in accordance with operational and organisational procedures.

Element 2 Prepare to load or unload the vehicle

You must be able to prepare to load or unload the vehicle. You will know how to correctly position the vehicle for loading or unloading and will follow safety precautions necessary for the vehicle type. **The vehicle type is any vehicle used for the movement of loads by road.** You will need to have knowledge of the particular vehicle or trailer type or be able to find out the relevant knowledge and safety precautions. You will need to correctly prepare the vehicle for loading or unloading and will need to consult with the loading or un-loading personnel the order to load or unload the vehicle and where to place or replace the loads. **The load is any goods moved by road.** The vehicle and equipment may vary depending on the type load and you will need to know the correct loading or unloading requirements and safety precautions for the loads in question. Where you need to communicate with other personnel, you should do so in the appropriate manner.

UNIT (CDG 7)

Handling goods and materials

Element 3 Load or unload the vehicle

You must be able to load or unload the vehicle. You will ensure the safety of any personnel in the vicinity of the loading area during the loading or unloading operation. You will carry out the loading and unloading operation safely in accordance with operational and organisational requirements. You will need to ensure that the load is distributed or re-distributed correctly (eg weights and dimensions) in compliance with relevant legislation, regulation and codes of practice. **The vehicle type is any vehicle used for the movement of loads by road. The load is any goods transported by road.** When loaded you will ensure that the load is correctly restrained in accordance with relevant legislation, regulation & codes of practice and you will also prevent the loads from contamination, damage and the elements during transportation. You will correctly dispose of any waste material created during the loading or unloading process in an environmentally friendly way and in accordance with relevant legislation, regulation and codes of practice. You will need to complete the relevant documentation for the collection or delivery, and where you need to communicate with other personnel, you should do so in the appropriate manner.

UNIT (CDG 7)

Handling goods and materials

Element 1 (7.1)

Confirm load, location and time for collection or delivery

Performance Criteria

You must be able to:

- 1 Identify the type of load being transported.
- 2 Confirm the location for delivery or collection of the load.
- 3 Identify any restrictions to loading or unloading.
- 4 Confirm the route and schedule for delivery or collection of the goods and obtain the correct documentation.
- 5 Identify any specialist equipment requirements for loading and unloading.
- 6 Identify any health, safety or environmental issues relating to the delivery or collection.
- 7 Report and record any difficulties identified with the delivery or collection schedule in accordance with operational and organisational procedures.
- 8 Confirm that the appropriate authorities have been notified about the transportation of specialist / abnormal loads.

Knowledge and Understanding

You must know and understand:

- a) the relevant legislation, regulation and codes of practice for loading and unloading
- b) collection and delivery documentation systems
- c) types of health, safety or environmental issues relative to the load or the delivery or collection
- d) routes and schedules for transportation of the loads
- e) types of load for delivery or collection
- f) the types of restrictions that can affect loading and unloading
- g) operational and organisational procedures for reporting and recording difficulties
- h) methods of communication eg oral, written, electronic

UNIT (CDG 7)

Handling goods and materials

Element 1 (7.1)

Confirm load, location and time for collection or delivery

Evidence requirements

The assessor should be confident that the outcomes have been produced by competent performance and that the candidate is capable of repeating competent performance. Evidence of competency will probably be collected over a period of time in the normal work environment or under similar conditions. Those providing witness testimony must be occupationally competent and reliable to recognise and support the evidence of competence for the candidate.

For this element evidence will be a combination of performance and outcome of performance, supported by questioning and witness testimony. The candidate will need to have knowledge and understanding of the type of load and the location for collection or delivery, the schedules, the documentation and papers required. They will need to know and understand any specific instructions relating to health, safety or environmental issues relating to the loads and the delivery or collection of the goods. They will also need to know of any restrictions in respect of the routes, the collection and delivery points.

The assessor must ascertain that the candidate has a clear understanding of legislation, regulations and codes of practice relating to the industry for the loading and unloading of goods.

Evidence should come from observing the candidate during his or her normal and typical work activities when preparing to collect and deliver goods it should be evident that the candidate can confirm the type of load being transported and relate to any restrictions with the delivery or collection points. The candidate will have to show how they communicate with the respective persons or authorities for the movement of the loads in particular the movement of specialist/abnormal loads. They will also need to demonstrate how they confirm the route and schedules for the collection and delivery of goods. The assessor will need to see documentation and papers relating to the transportation of the loads.

When assessing knowledge and understanding it would be expected that any questioning would be recorded.

UNIT (CDG 7)

Handling goods and materials

Element 1 (7.1)

Confirm load, location and time for collection or delivery

Additional Evidence

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (CDG 7)

Handling goods and materials

Element 2 (7.2)

Prepare to load or unload the vehicle

Performance Criteria

You must be able to:

- 1 Confirm the point of collection or delivery for the loads being transported.
- 2 Confirm the load and the vehicle being used for the transportation of the load.
- 3 Correctly position the vehicle to load or unload in accordance with operational and organisational procedures.
- 4 Carry out relevant vehicle safety checks and prepare the vehicle for loading or unloading according to the manufacturers and industry guidelines.
- 5 Discuss and agree the loading or unloading order and load distribution with appropriate personnel in accordance with legislation, regulation and codes of practice.
- 6 Identify any special requirements and obtain any specialist equipment for loading or unloading.
- 7 Prepare the area to ensure the safety of personnel during the loading or unloading operation.
- 8 Take appropriate actions to resolve problems with loading or unloading and inform the appropriate person in accordance with operational and organisational procedures.

Knowledge and Understanding

You must know and understand:

- a) type of load for delivery or collection
- b) type of vehicle transporting the load
- c) Manufacturers and industry guidelines for safety checks for the particular vehicle type
- d) vehicle preparation, positioning and safety procedures in respect of particular type of vehicle and load
- e) relevant safety procedures for personnel
- f) relevant operational and organisational procedures
- g) the relevant legislation, regulation & codes of practice for loading and unloading
- h) collection and delivery documentation and systems
- i) health, safety or environmental issues relative to the load or the delivery or collection
- j) operational and organisational procedures for reporting and recording difficulties
- k) methods of communication eg oral, written, electronic

UNIT (CDG 7)

Handling goods and materials

Element 2 (7.2)

Prepare to load or unload the vehicle

Evidence requirements

The assessor should be confident that the outcomes have been produced by competent performance and that the candidate is capable of repeating competent performance. Evidence of competency will probably be collected over a period of time in the normal work environment or under similar conditions. Those providing witness testimony must be occupationally competent and reliable to recognise and support the evidence of competence for the candidate.

For this element primary evidence will be performance and outcome of performance, supported by questioning and witness testimony. The candidate will need to have knowledge and understanding of the type of load, the type of vehicle being used to transport the load, the location for collection or delivery, the schedules, the documentation and papers required. They will need to know and understand any specific instructions relating to health, safety or environmental issues relating to the delivery or collection of the goods. They will also need to know of any special requirements for loading or unloading the goods.

The assessor must ascertain that the candidate has a clear understanding of legislation, regulations and codes of practice relating to the industry for the loading and unloading of goods.

Evidence should come from observing the candidate during his or her normal and typical work activities when preparing to load or unload the vehicle. It should be evident that the candidate confirms the point of collection or delivery and positions the vehicle safely and correctly to load and unload the goods. The candidate will need to show how the vehicle is prepared correctly and made secure for loading and unloading. How they communicate with the respective persons to agree order and distribution of the loads being moved and how to ensure the safety of the area during loading and unloading. The assessor will need to see documentation and papers relating to the collection and delivery of the loads.

When assessing knowledge and understanding it would be expected that any questioning would be recorded.

UNIT (CDG 7)

Handling goods and materials

Element 2 (7.2)

Prepare to load or unload the vehicle

Additional Evidence

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (CDG 7)

Handling goods and materials

Element 3 (7.3)

Load or unload the vehicle

Performance Criteria

You must be able to:

- 1 Ensure the safety of all personnel in the vicinity of the loading area during the loading or unloading operation.
- 2 Carry out the loading and unloading operation safely in accordance with operational and organisational requirements.
- 3 Distribute or re-distribute the load as required in accordance with legislation, regulation and codes of practice during the loading or unloading operation.
- 4 Ensure the safety and security of loads, using suitable restraints and protection methods in accordance with legislation, regulation and approved codes of practice.
- 5 Prevent the goods from contamination, damage and the elements in accordance with manufacturers and industry guidelines.
- 6 Dispose of any waste material in accordance with relevant legislation, regulation and approved codes of practice.
- 7 Inform the relevant personnel and agree actions to resolve any problems with loading or unloading according to operational and organisational procedures.
- 8 Complete the relevant documentation for the collection or delivery of the load.

Knowledge and Understanding

You must know and understand:

- a) type of load for delivery or collection
- b) type of vehicle transporting the load
- c) health and safety procedures during loading or unloading operations
- d) methods, legislation, regulation and approved codes of practice for disposing of waste material (COSHH)
- e) manufacturers and industry guidelines for preventing contamination and damage to the goods in transport
- f) relevant safety procedures for personnel in the vicinity of the loading area
- g) relevant operational and organisational procedures
- h) the relevant legislation, regulation & codes of practice for loading and unloading eg distribution and re-distribution, restraints and protection of loads
- i) methods of communication eg oral, written, electronic
- j) documentation systems and procedures

UNIT (CDG 7) Handling goods and materials

Element 3 (7.3) Load or unload the vehicle

Evidence requirements

The assessor should be confident that the outcomes have been produced by competent performance and that the candidate is capable of repeating competent performance. Evidence of competency will probably be collected over a period of time in the normal work environment or under similar conditions. Those providing witness testimony must be occupationally competent and reliable to recognise and support the evidence of competence for the candidate.

For this element primary evidence will be performance and outcome of performance, supported by questioning and witness testimony. The candidate will need to have knowledge and understanding of the type of load, the type of vehicle being used to transport the load and the documentation and papers relevant to the loads being transported. They will need to know and understand health and safety procedures during loading and unloading operations and any specific instructions or guidelines in respect of the goods to prevent contamination and damage during transportation. They will also need to know methods and procedures for disposal of waste.

The assessor must ascertain that the candidate has a clear understanding of legislation, regulations and codes of practice relating to the industry for the loading and unloading of goods and for the handling and disposal of waste material. COSHH.

Evidence should come from observing the candidate during his or her normal and typical work activities when loading or unloading the vehicle. It should be evident that the candidate ensures the safety of personnel in the vicinity of the loading area. The candidate will need to demonstrate the loading and unloading of the vehicle, show how loads are handled and distributed, and show how they are secured or restrained to ensure safety and prevent damage or contamination to the goods. The candidate will need to show how waste materials are removed and disposed of and how to communicate with the relevant personnel during the loading or unloading operations. The assessor will need to see documentation and papers relating to the collection and delivery of the loads.

When assessing knowledge and understanding it would be expected that any questioning would be recorded.

UNIT (CDG 7)

Handling goods and materials

Element 3 (7.3)

Load or unload the vehicle

Additional Evidence

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (CDG 8) Handling goods (motorcycle and pedal cycle)

This unit has the following element:

Element 1 (8.1)	Confirm goods to be moved and the time for collection or delivery
Element 2 (8.2)	Carry out collection and delivery

Unit Summary

Element 1 Confirm goods to be moved and the time for collection or delivery

You must be able to confirm the goods to be moved and the time for collection or delivery. You will need to confirm the route and schedule and identify any restrictions to the movement of the goods. You will need to identify any specialist equipment required to carry out the collection or delivery. You will need to take account of relevant legislation, regulation and codes of practice including safety and environmental considerations. You will communicate with the relevant people and where necessary inform relevant authorities of transportation of specialist goods.

Element 2 Carry out collection and delivery

You must be able to carry out the collection and delivery of the goods in compliance with relevant legislation, regulation and codes of practice. You will need to be aware of any restrictions to movement at the location, and if there are any specialist requirements to carry out the collection or delivery. You will carry out the collection or delivery operation safely in accordance with operational and organisational procedures and you will communicate with the relevant personnel the progress of the movement of the goods. You must ensure that the correct documentation is completed in accordance with operational and organisational procedures, and where difficulties occur with the collection or delivery take suitable action. You will also complete end of journey procedures.

UNIT (CDG 8)

Handling goods (motorcycle and pedal cycle)

Element 1 (8.1)

Confirm goods to be moved and the time for collection or delivery

Performance Criteria

You must be able to:

- 1 Identify the type of goods being moved.
- 2 Ensure the movement of goods complies with relevant legislation, regulation and codes of practice.
- 3 Confirm the route and schedule for delivery or collection of the goods and obtain the correct documentation.
- 4 Identify any restrictions relating to the delivery and collection of the goods.
- 5 Identify any specialist equipment required to carry the goods.
- 6 Identify any health, safety or environmental issues relating to the delivery or collection.
- 7 Confirm that the appropriate authorities have been notified, where appropriate, about the transportation of specialist goods.

Knowledge and Understanding

You must know and understand:

- a) the relevant legislation, regulation and codes of practice for loading and unloading
- b) collection and delivery documentation systems
- c) types of health, safety or environmental issues relative to the load or the delivery or collection
- d) routes and schedules for transportation of the loads
- e) types of load for delivery or collection
- f) the types of restrictions that can affect loading and unloading
- g) operational and organisational procedures for reporting and recording difficulties
- h) methods of communication eg oral, written, electronic

UNIT (CDG 8)

Handling goods (motorcycle and pedal cycle)

Element 1 (8.1)

Confirm goods to be moved and the time for collection or delivery

Evidence requirements

The assessor should be confident that the outcomes have been produced by competent performance and that the candidate is capable of repeating competent performance. Evidence of competency will probably be collected over a period of time in the normal work place, or under similar conditions. Those providing witness testimony must be occupationally competent and reliable to recognise and support the evidence of competence for the candidate.

For this element evidence will come from performance, questioning, outcome of performance and supported by witness testimony. The candidate will need to have knowledge and understanding of the goods to be moved, the collection and delivery documentation, routes and schedules and any health, safety or environmental issues relating to the goods to be moved.

The assessor must ascertain that the candidate has a clear understanding of legislation, regulations and codes of practice relating to the goods to be moved and moving goods by motorcycle or pedal cycle.

Evidence should come from observing the candidate during his or her normal and typical work activities when preparing to move goods by motorcycle or pedal cycle. The candidate must demonstrate how the goods to be moved are confirmed and how documentation and delivery papers are obtained and completed for delivery of the goods. It should be evident that the candidate can confirm the time for collection and delivery, the route, the need for any specialist equipment to carry the goods and any health, safety or environmental issues to be catered for in the movement and handling of the goods. The assessor must see how the appropriate authorities are notified of the goods being moved by motorcycle or pedal cycle.

Evidence from records produced and maintained by the candidate on current and previous work done for moving goods by motorcycle or pedal cycle should also be readily available for the assessor to inspect.

When assessing knowledge and understanding it would be expected that any questioning would be recorded.

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UNIT (CDG 8)

Handling goods (motorcycle and pedal cycle)

Element 1 (8.1)

Confirm goods to be moved and the time for collection or delivery

Additional Evidence

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (CDG 8)

Handling goods (motorcycle and pedal cycle)

Element 2 (8.2)

Carry out collection and delivery

Performance Criteria

You must be able to:

- 1 Confirm the suitability and roadworthiness of the equipment available.
- 2 Safely load and secure the goods in compliance with relevant legislation, regulation and codes of practice.
- 3 Carry out the collection or delivery operation safely in accordance with operational and organisational procedures.
- 4 Monitor progress, report and record any difficulties with the delivery or collection and take appropriate action in accordance with operational and organisational procedures.
- 5 Complete collection and delivery documentation in accordance with operational and organisational procedures.
- 6 Complete end of journey procedures in accordance with operational and organisational procedures.

Knowledge and Understanding

You must know and understand:

- a) the relevant legislation, regulation & codes of practice relating to the goods to be moved
- b) collection and delivery documentation and systems
- c) types of health, safety or environmental issues relative to the goods
- d) types of goods for delivery or collection
- e) the types of restrictions that can affect delivery and collection
- f) operational and organisational procedures for reporting and recording difficulties
- g) methods of communication eg oral, written, electronic

UNIT (CDG 8) Handling goods (motorcycle and pedal cycle)

Element 2 (8.2) Carry out collection and delivery

Evidence requirements

The assessor should be confident that the outcomes have been produced by competent performance and that the candidate is capable of repeating competent performance. Evidence of competency will probably be collected over a period of time in the normal work environment or under similar conditions. Those providing witness testimony must be occupationally competent and reliable to recognise and support the evidence of competence for the candidate.

For this element primary evidence will be performance, supported by questioning, outcome of performance and witness testimony. The candidate will need to have knowledge and understanding of the goods to be collected and delivered, the schedules, the documentation and papers required. They will also need to know and understand any specific instructions relating to health, safety in respect of the goods and any in relation to restrictions or the environment in respect of the routes, the collection and delivery points.

The assessor must ascertain that the candidate has a clear understanding of legislation, regulations and codes of practice relating to the goods to be moved and moving goods by motorcycle or pedal cycle.

Evidence should come from observing the candidate during his or her normal and typical work activities when moving goods by motorcycle or pedal cycle. It should be evident that the candidate can carry out collection and delivery of goods safely and correctly by motorcycle or pedal cycle. They must confirm the suitability and roadworthiness of the motorcycle or pedal cycle and they must ensure the goods are secure and not damaged during movement. The candidate will also maintain and keep documentation and papers as required and follow the relevant procedures for completion at the end of journey. The assessor will need to ensure that the candidate carries out all of these performance activities and that all documentation and papers are appropriate to the work carried out.

Evidence from records produced and maintained by the candidate on current and previous work done when moving goods by motorcycle or pedal cycle should also be readily available for the assessor to inspect.

UNIT (CDG 8)

Handling goods (motorcycle and pedal cycle)

Element 2 (8.2)

Carry out collection and delivery

Additional Evidence

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (CDG 9) Dealing with payment transactions

This unit has the following element:

Element 1 (9.1)	Confirm requirements for collecting payments
Element 2 (9.2)	Collect and account for payments for goods delivered

Unit Summary

Element 1 Confirm requirements for collecting payments

You must be able to confirm the requirements for collecting payments. You will need to confirm the goods or load to be delivered and identify any special requirements for collecting payments. **Goods are items that make up a load. A load is any goods moved by road.** You will need to obtain any documentation that is required for collecting payments in accordance with operational and organisational procedures. You will also need to take account of safety and security arrangements in accordance with operational and organisational procedures, eg secure cash boxes. Where you need to communicate with other personnel, you should do so in the appropriate manner.

Element 2 Collect and account for payments for goods delivered

You must be able to collect and account for payments for goods delivered. You must confirm the delivery of goods, the amount and the method of payment to be received. **Goods are items that make up a load. A load is any goods moved by road.** You will need to collect payments when goods are delivered and issue the appropriate receipts. You will need to ensure cash amounts are carried securely in accordance with operational and organisational procedures. You will reconcile the payments received with the documentation and hand over or deposit the completed documentation and payments collected in accordance with operational and organisational procedures. Report any discrepancies with payments to the relevant persons.

UNIT (CDG 9)

Dealing with payment transactions

Element 1 (9.1)

Confirm requirements for collecting payments

Performance Criteria

You must be able to:

- 1 Confirm the goods being delivered and the requirement to collect payment.
- 2 Confirm time and date for delivery and arrangements for payment.
- 3 Obtain any documentation that is required for collecting payment according to operational and organisational procedures.
- 4 Confirm the amount involved and that there is adequate provision and security for collection and carrying of cash payments.
- 5 Communicate and inform the relevant persons of the payment collection.
- 6 Keep records of amounts involved in accordance with operational and organisational procedures.

Knowledge and Understanding

You must know and understand:

- a) the sources of information relating to the collection of payments
- b) means of carrying cash securely
- c) operational and organisational procedures relevant to the collection of payments
- d) methods of communication eg oral, written, electronic
- e) payment and collection procedures eg credit card, cash, cheque

UNIT (CDG 9) Dealing with payment transactions

Element 1 (9.1) Confirm requirements for collecting payments

Evidence requirements

The assessor should be confident that the outcomes have been produced by competent performance and that the candidate is capable of repeating competent performance. Evidence of competency will probably be collected over a period of time in the normal work place, or under similar conditions. Those providing witness testimony must be occupationally competent and reliable to recognise and support the evidence of competence for the candidate.

For this element evidence will come from performance, supported by witness testimony, questioning and outcome of performance. The candidate will need to have knowledge and understanding of the operational and organisational procedures for dealing with payment transactions, what documentation and papers are required, the security requirements for handling cash payments and the identity of the persons involved with the payment transactions.

Evidence should come from observing the candidate during his or her normal and typical work activities when dealing with payment transactions and the keeping of records and paperwork relating to payment transactions. It should be evident that the candidate can confirm information relating to the requirements for collecting payments. They will also need to confirm the method of payment, the point of collection and where the payment has to be handed over. The assessor will need to see how the candidate is to secure the payments and what notes or notification have to be handed over or exchanged on collection, receipt and deposit of payments.

Evidence from records produced and maintained by the candidate on current and previous work done to confirm requirements for collecting payments should also be readily available for the assessor to inspect.

When assessing knowledge and understanding it would be expected that any questioning would be recorded.

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UNIT (CDG 9)

Dealing with payment transactions

Element 1 (9.1)

Confirm requirements for collecting payments

No	Description of Evidence	Performance Criteria						Knowledge and Understanding				
		1	2	3	4	5	6	a	b	c	d	e

UNIT (CDG 9)

Dealing with payment transactions

Element 1 (9.1)

Confirm requirements for collecting payments

Additional Evidence

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (CDG 9)

Dealing with payment transactions

Element 2 (9.2)

Collect and account for payments for goods delivered

Performance Criteria

You must be able to:

- 1 Confirm the delivery of goods, the amount and the method of payment to be received.
- 2 Collect payment when goods are delivered and confirm the amounts received are correct.
- 3 Record and issue receipt for the payment received in accordance with operational and organisational procedures.
- 4 Secure cash amounts in the designated place in accordance with operational and organisational procedures.
- 5 Reconcile the payments received with the documentation in accordance with operational and organisational procedures.
- 6 Hand over or deposit completed documentation and payments collected to the relevant person or place.
- 7 Report any discrepancies with payments to the relevant persons in accordance with operational and organisational procedures.

Knowledge and Understanding

You must know and understand:

- a) the sources of information relating to the collection of payments
- b) methods of carrying cash securely
- c) operational and organisational procedures relevant to the collection of payments
- d) methods of communication eg oral, written, electronic
- e) payment and collection procedures eg credit card, cash, cheque

UNIT (CDG 9) Dealing with payment transactions

Element 2 (9.2) Collect and account for payments for goods delivered

Evidence requirements

The assessor should be confident that the outcomes have been produced by competent performance and that the candidate is capable of repeating competent performance. Evidence of competency will probably be collected over a period of time in the normal work place, or under similar conditions. Those providing witness testimony must be occupationally competent and reliable to recognise and support the evidence of competence for the candidate.

For this element evidence will come from performance, supported by witness testimony, questioning and outcome of performance. The candidate will need to have knowledge and understanding of the operational and organisational procedures for collecting and accounting for payments for goods delivered. They will need to know what documentation and papers are required, what the security requirements are for handling cash payments and the identity of the persons involved with the payment transactions.

Evidence should come from observing the candidate during his or her normal and typical work activities when dealing with payment transactions and the keeping of records and paperwork relating to payment transactions. It should be evident that the candidate can collect and account for payments for goods delivered and that payment transactions are carried out following organisational and operational procedures. The assessor must see how the payments are collected and made secure and how they are then handed over and deposited to the recognised authority. The assessor must also confirm that documentation and papers are completed as required and how payment transactions completed are communicated to the respective persons.

Evidence from records produced and maintained by the candidate on current and previous work done to collect and account for payments for goods delivered should also be readily available for the assessor to inspect.

When assessing knowledge and understanding it would be expected that any questioning would be recorded.

UNIT (CDG 9)

Dealing with payment transactions

Element 2 (9.2)

Collect and account for payments for goods delivered

Additional Evidence

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (CDG 10) Operate specialised plant and machinery to performance requirements (lifting and transferring)

This unit has the following element:

Element 1 (10.1)	Prepare and set up plant and machinery
Element 2 (10.2)	Operate plant and machinery to meet work requirements
Element 3 (10.3)	Shut down and secure plant and machinery

Unit Summary

Element 1 Prepare and set up plant and machinery

The unit is designed to assess the candidate's competence in operating specialised plant and machinery to performance requirements, to interpret instruction and information to carry out operations. It confirms the competence to prepare the plant and machinery to meet the work activity planned and that the equipment is safe, set up and fully operational to carry out the work. It provides for operating the plant and machinery in the work activity and places emphasis on the consequences of the activity and the need to ensure safety and security in the work environment, including the need to be aware of others, whether work personnel or members of the public, who may have contact with the activity. Similarly this competence should also be in evidence in respect of property. Concluding the work activity, ensuring plant and machinery is secure and maintained in an operable condition completes the competence of the unit. Throughout the range of activities envisaged there is the need to communicate with others and this too is recognised in the competence of operating the specialised plant and machinery to performance requirements.

Element 2 Operate plant and machinery to meet work requirements

The unit is designed to assess the candidate's competence in operating specialised plant and machinery to performance requirements, to interpret instruction and information to carry out operations. It confirms the competence to prepare the plant and machinery to meet the work activity planned and that the equipment is safe, set up and fully operational to carry out the work. It provides for operating the plant and machinery in the work activity and places emphasis on the consequences of the activity and the need to ensure safety and security in the work environment, including the need to be aware of others, whether work personnel or members of the public, who may have contact with the activity. Similarly this competence should also be in evidence in respect of property. Concluding the work activity, ensuring plant and machinery is secure and maintained in an operable condition completes the competence of the unit. Throughout the range of activities envisaged there is the need to communicate with others and this too is recognised in the competence of operating the specialised plant and machinery to performance requirements.

UNIT (CDG 10)

Operate specialised plant and machinery to performance requirements (lifting and transferring)

Element 3 Shut down and secure plant and machinery

The unit is designed to assess the candidate's competence in operating specialised plant and machinery to performance requirements, to interpret instruction and information to carry out operations. It confirms the competence to prepare the plant and machinery to meet the work activity planned and that the equipment is safe, set up and fully operational to carry out the work. It provides for operating the plant and machinery in the work activity and places emphasis on the consequences of the activity and the need to ensure safety and security in the work environment, including the need to be aware of others, whether work personnel or members of the public, who may have contact with the activity. Similarly this competence should also be in evidence in respect of property. Concluding the work activity, ensuring plant and machinery is secure and maintained in an operable condition completes the competence of the unit. Throughout the range of activities envisaged there is the need to communicate with others and this too is recognised in the competence of operating the specialised plant and machinery to performance requirements.

UNIT (CDG 10)

Operate specialised plant and machinery to performance requirements (lifting and transferring)

Element 1 (10.1)

Prepare and set up plant and machinery

Performance Criteria

You must be able to:

- 1 Work requirements are confirmed with the appropriate person(s) as to the extent, method and detail of the work activity to be undertaken.
- 2 **Hazards and conditions** that affect the work activity are identified and actions agreed with the appropriate person(s).
- 3 The **equipment** to be used is confirmed as available and applicable to the work activity.
- 4 Pre-start checks are carried out on the equipment, its energy and ancillary supplies in accordance with approved operating procedures and practices.
- 5 The **equipment** is prepared, set up and adjusted for the work activity in accordance with instructions, safety and the work requirements.
- 6 Operational performance of the **equipment** and its associated systems is confirmed as correct, safe and appropriate to the work activity.
- 7 Defects and damage of the **equipment** are recorded and appropriate action taken for any correction.
- 8 Records are maintained in accordance with organisational procedures and requirements.
- 9 Problems and conditions outside the responsibility of the job holder are referred to an authorised person.
- 10 Work is carried out to **approved procedures and practices** and in compliance with statutory requirements.

Knowledge and Understanding

You must know and understand:

- a) hazards and conditions that affect the work activity
- b) types of equipment in relation to the work activity
- c) setting up equipment for the work activity
- d) methods of adjustment for varying equipment performance
- e) pre-start routine checks
- f) types of defects in the equipment
- g) format and procedures for recording and communicating information
- h) approved procedures and practices in the context of the operations, the work activity and the workplace environment (organisational, regulatory, emergency, operational)
- i) responsibilities under the Health and Safety statutory requirements

UNIT (CDG 10) Operate specialised plant and machinery to performance requirements (lifting and transferring)

Element 1 (10.1) Prepare and set up plant and machinery

Evidence requirements

The assessor should be confident that the outcomes have been produced by competent performance and that the candidate is capable of repeating competent performance. Evidence of competency will probably be collected over a period of time in the normal work environment or under similar conditions. Those providing witness testimony must be occupationally competent and reliable to recognise and support the evidence of competence for the candidate.

For this element evidence will be from performance, outcome of performance and questioning, supported by witness testimony. The candidate will need to have knowledge and understanding of any hazards and conditions that affect the work activity. They will need to know the types of equipment to be used with the work activity, what is required in setting up the equipment for the work activity, the methods of adjustment for varying equipment performance, what pre-start routine checks are involved and what types of defects in the equipment and its performance that they need to be alert to. The candidate will need have knowledge and understanding of the format and procedures for recording and communicating information, what the approved procedures and practices are in the context of the operations, the work activity and the workplace environment (organisational, regulatory, emergency, operational) and they will need to know their responsibilities under the Health and Safety Statutory Requirements.

The assessor must ascertain that the candidate has a clear understanding of legislation, regulations and codes of practice relating to operations with the selected specialist plant and machinery.

When assessing knowledge and understanding it would be expected that any questioning would be recorded.

Performance evidence should come from observing the candidate during his or her normal and typical work activities. It should be evident that the candidate is able to prepare and set up the selected specialist plant and machinery /equipment to be used for the lifting and transferring of loads. The assessor would have to be confident that the candidate confirms the work requirement and the area of work, and that they identify with any **hazards and conditions that affect the work activity** : *adverse circumstances affecting plant and machinery stability, load stability, load security, load handling, restricted access, services apparatus, fixed and temporary furnishings and structures, neighbouring work and traffic activities, encroaching personnel*. The candidate will show that they can identify with the type of **equipment to be used in the work activity**: *the selected specialised plant and machinery category and the key aspects associated with its operations - stability arrangements when operational and at rest for jacks and brakes, power and transmission to include travel, traversing, lifting, system controls to include manoeuvring, lifting and safety, lifting gear and attachments*. The candidate will also show how they set up and adjust the equipment for the work activity and how they carry out pre-start checks on the equipment, energy and ancillary supplies. The assessor must see that the candidate can start, run and confirm operational performance of equipment and control systems and that they carry out work safely.

UNIT (CDG 10) Operate specialised plant and machinery to performance requirements (lifting and transferring)

Evidence requirements (cont)

The assessor must also see that the candidate maintains records as required and that all aspects of the work is carried out according to **approved procedures and practices**: *organisational, regulatory, emergency, operational*.

Note: range/scope of performance is highlighted in **BOLD/Italics**

Evidence from records produced and maintained by the candidate on current and previous work done to prepare and set up the selected specialist plant and machinery should also be readily available for the assessor to inspect.

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UNIT (CDG 10)

Operate specialised plant and machinery to performance requirements (lifting and transferring)

Element 1 (10.1)

Prepare and set up plant and machinery

No	Description of Evidence	Performance Criteria										Knowledge and Understanding								
		1	2	3	4	5	6	7	8	9	10	a	b	c	d	e	f	g	h	i

UNIT (CDG 10)

Operate specialised plant and machinery to performance requirements (lifting and transferring)

Element 1 (10.1)

Prepare and set up plant and machinery

Additional Evidence

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (CDG 10) Operate specialised plant and machinery to performance requirements (lifting and transferring)

Element 2 (10.2) Operate plant and machinery to meet work requirements

Performance Criteria

You must be able to:

- 1 Area of work is identified and confirmed in accordance with instructions and to the specified work requirements.
- 2 Any changes in **hazards and conditions** that impinge on the work and safety are communicated to the appropriate person(s).
- 3 Operations are carried out safely in accordance with instructions and operational procedures to meet the specified work requirement.
- 4 **Equipment** is monitored to maintain safety of performance throughout the work activity.
- 5 **Methods of communication** are used in accordance with the designated procedure.
- 6 Any accident(s) and incident(s) during operations are dealt with promptly and appropriately in accordance with **approved procedures and practices**.
- 7 Records are maintained in accordance with organisational procedures and requirements.
- 8 Problems and conditions outside the responsibility of the job holder are referred to an authorised person.
- 9 Work is carried out to **approved procedures and practices** and in compliance with statutory requirements.

Knowledge and Understanding

You must know and understand:

- a) characteristics and capabilities of the equipment being used
- b) hazards and conditions that affect the work activity
- c) methods of communication used
- d) requirements for recording and communicating information
- e) accident and incident procedures
- f) approved procedures and practices in the context of the operations, the work activity and the workplace environment (organisational, regulatory, emergency, operational)
- g) responsibilities under the health and safety statutory requirements

UNIT (CDG 10) Operate specialised plant and machinery to performance requirements (lifting and transferring)

Element 2 (10.2) Operate plant and machinery to meet work requirements

Evidence requirements

The assessor should be confident that the outcomes have been produced by competent performance and that the candidate is capable of repeating competent performance. Evidence of competency will probably be collected over a period of time in the normal work environment or under similar conditions. Those providing witness testimony must be occupationally competent and reliable to recognise and support the evidence of competence for the candidate.

For this element evidence will be from performance, outcome of performance and questioning supported by witness testimony. The candidate will need to have knowledge and understanding of the characteristics and capabilities of the equipment being used, and of any hazards and conditions that affect the work activity. They will need to know the methods of communication used and what the requirements are for recording and communicating information. The candidate will need to know about accident and incident procedures, what the approved procedures and practices are in the context of the operations, the work activity and the workplace environment (organisational, regulatory, emergency, operational) and they will need to know their responsibilities under the Health and Safety Statutory Requirements

The assessor must ascertain that the candidate has a clear understanding of legislation, regulations and codes of practice relating to operations with the selected specialist plant and machinery.

When assessing knowledge and understanding it would be expected that any questioning would be recorded

Performance evidence should come from observing the candidate during his or her normal and typical work activities. It should be evident that the candidate is able to operate plant and machinery to performance requirements. The assessor would have to be confident that the candidate does identify with the area of work and can recognise any **hazards and conditions that may affect the work activity:** *adverse circumstances affecting plant and machinery stability, load stability, load security, load handling, restricted access, services apparatus, fixed and temporary furnishings and structures, neighbouring work and traffic activities, encroaching personnel.* The candidate must show how they operate, control and maintain the performance and safety of **the equipment being used:** *the selected specialised plant and machinery category and the key aspects associated with its operations - stability arrangements when operational and at rest for jacks and brakes, power and transmission to include travel, traversing, lifting, system controls to include manoeuvring, lifting and safety, lifting gear and attachments* The candidate must also show that they contribute to a safe working environment during carrying out their work. The assessor must see that the candidate uses clear and the designated **methods of communications:** *visual and oral.* The assessor must also see that the candidate maintains records as required and that all aspects of the work is carried out according to **approved procedures and practices:** *organisational, regulatory, emergency, operational.*

UNIT (CDG 10)

Operate specialised plant and machinery to performance requirements (lifting and transferring)

Evidence requirements (cont)

Note: range/scope of performance is highlighted in **BOLD/Italics**

Evidence from records produced and maintained by the candidate on current and previous work done to operate plant and machinery to performance requirements should also be readily available for the assessor to inspect.

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UNIT (CDG 10)

Operate specialised plant and machinery to performance requirements (lifting and transferring)

Element 2 (10.2)

Operate plant and machinery to meet work requirements

Additional Evidence

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (CDG 10) Operate specialised plant and machinery to performance requirements (lifting and transferring)

Element 3 (10.3) Shut down and secure plant and machinery

Performance Criteria

You must be able to:

- 1 Work activity is concluded to instruction and in accordance with the specified requirements.
- 2 **Hazards and conditions** that affect the shutdown or the equipment's security are identified and allowed for during and on completion of the shutdown.
- 3 **Equipment** is shut down and left secure in accordance with **approved procedures and practices**.
- 4 Any defects and damage of **equipment** are recorded and appropriate action taken for its correction.
- 5 **Equipment** is maintained and ready for use in accordance with **post-stop maintenance** requirements.
- 6 Records are maintained in accordance with organisational procedures and requirements.
- 7 Problems and conditions outside the responsibility of the job holder are referred to an authorised person.
- 8 Work is carried out to **approved procedures and practices** and in compliance with statutory requirements.

Knowledge and Understanding

You must know and understand:

- a) procedures for concluding work activity
- b) hazards and conditions that affect the shutdown or equipment security
- c) parking and securing requirements for the equipment
- d) post-stop maintenance requirements for the equipment
- e) approved procedures and practices in the context of the operations, the work activity and the workplace environment (organisational, regulatory, emergency, operational)
- f) responsibilities under the health and safety statutory requirements

UNIT (CDG 10) Operate specialised plant and machinery to performance requirements (lifting and transferring)

Element 3 (10.3) Shut down and secure plant and machinery

Evidence requirements

The assessor should be confident that the outcomes have been produced by competent performance and that the candidate is capable of repeating competent performance. Evidence of competency will probably be collected over a period of time in the normal work environment or under similar conditions. Those providing witness testimony must be occupationally competent and reliable to recognise and support the evidence of competence for the candidate.

For this element evidence will be from performance, outcome of performance and questioning supported by witness testimony. The candidate will need to have knowledge and understanding of procedures for concluding work activity any hazards and conditions that affect the shutdown or equipment security. They will need to know of the parking and securing requirements for the equipment and the post-stop maintenance requirements for the equipment. The candidate will need have knowledge and understanding of what the approved procedures and practices are in the context of the operations, the work activity and the workplace environment (organisational, regulatory, emergency, operational) and they will need to know their responsibilities under the Health and Safety Statutory Requirements

The assessor must ascertain that the candidate has a clear understanding of legislation, regulations and codes of practice relating to operations with the selected specialist plant and machinery.

When assessing knowledge and understanding it would be expected that any questioning would be recorded

Performance evidence should come from observing the candidate during his or her normal and typical work activities. It should be evident that the candidate is able to shut down and secure plant and machinery. The assessor would have to be confident that the candidate is able to conclude the work activity to instruction and approved procedure and does shut down equipment safely and correctly. The candidate will need to show that they identify with any **hazards and conditions that affect the shutdown or equipment security** : *adverse circumstances affecting plant and machinery stability, load stability, load security, load handling, restricted access, services apparatus, fixed and temporary furnishings and structures, neighbouring work and traffic activities, encroaching personnel*. The candidate will show that they can identify with the type of **equipment involved**: *the selected specialised plant and machinery category and the key aspects associated with its operations - stability arrangements when operational and at rest for jacks and brakes, power and transmission to include travel, traversing, lifting, system controls to include manoeuvring, lifting and safety, lifting gear and attachments*. They will show how they carry out **post-stop maintenance**:- *routine checks, visual wear and tear inspection, damage assessment, energy supplies, safety checks*. The assessor must ensure that all aspects of the work is carried out according to **approved procedures and practices**: *organisational, regulatory, emergency, operational*.

UNIT (CDG 10) Operate specialised plant and machinery to performance requirements (lifting and transferring)

Evidence requirement (cont)

Note: range/scope of performance is highlighted in **BOLD/Italics**

Evidence from records produced and maintained by the candidate on current and previous work done to shut down and secure plant and machinery should also be readily available for the assessor to inspect.

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UNIT (CDG 10)

Operate specialised plant and machinery to performance requirements (lifting and transferring)

Element 3 (10.3)

Shut down and secure plant and machinery

No	Description of Evidence	Performance Criteria								Knowledge and Understanding					
		1	2	3	4	5	6	7	8	a	b	c	d	e	f

UNIT (CDG 10)

Operate specialised plant and machinery to performance requirements (lifting and transferring)

Element 3 (10.3)

Shut down and secure plant and machinery

Additional Evidence

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (CDG 11) Lift, transfer and position loads

This unit has the following element:

Element 1 (11.1)	Prepare for movement of load
Element 2 (11.2)	Lift and transfer load to its designated location
Element 3 (11.3)	Position and set down load

Unit Summary

The unit is designed for the candidate to demonstrate competence to lift, transfer and position loads. To prepare for the movement of loads using specialised equipment, lifting the load and transferring by mechanical means to a designated location, positioning, setting down and releasing the load safely and securely. (Covers general and specific materials handling, eg cargo, supplies, goods, equipment.)

UNIT (CDG 11)

Lift, transfer and position loads

Element 1 (11.1)

Prepare for movement of load

Performance Criteria

You must be able to:

- 1 Load to be moved, its location and destination are accurately identified from relevant information and instructions.
- 2 The area of work is checked for safety and confirmed secure for the movement and transfer of loads.
- 3 Method of movement and transfer is assessed and appropriate measures taken to ensure safety of the operation.
- 4 Difficulties in carrying out the movement and transfer are identified and clarified with the appropriate person(s).
- 5 **Potential hazards** in the work area are accurately identified and action taken in accordance with **approved procedures and practices**.
- 6 **Equipment** to be used is confirmed as suitably prepared and set up for the work requirement.
- 7 Records are maintained in accordance with organisation and operational requirements.
- 8 Problems and conditions outside the responsibility of the job holder are referred to an authorised person.
- 9 Work is carried out to **approved procedures and practices** and in compliance with statutory requirements.

Knowledge and Understanding

You must know and understand:

- a) the different types of loads, their characteristics and movement requirements
- b) types of equipment used for the movement and transfer of loads in the context of the operations and work activity
- c) preparation and set-up requirements for the specified equipment
- d) methods for lifting and movement of load relative to the specified equipment and characteristics of the load
- e) types of workplace hazards encountered and the working practices for dealing with them
- f) organisational and operational requirements for keeping records
- g) approved procedures and practices in the context of the operations, the work activity and the workplace environment (organisational, regulatory, emergency, operational)
- h) responsibilities under the health and safety statutory requirements

UNIT (CDG 11) Lift, transfer and position loads

Element 1 (11.1) Prepare for movement of load

Evidence requirements

The assessor should be confident that the outcomes have been produced by competent performance and that the candidate is capable of repeating competent performance. Evidence of competency will probably be collected over a period of time in the normal work environment or under similar conditions. Those providing witness testimony must be occupationally competent and reliable to recognise and support the evidence of competence for the candidate.

For this element evidence will be from performance, outcome of performance and questioning supported by witness testimony. The candidate will need to have knowledge and understanding of the different types of loads, their characteristics and movement requirements. They will need to know about the types of equipment used for the movement and transfer of loads in the context of the operations and work activity. The candidate will need to have knowledge of the preparation and set-up requirements for the specified equipment. They will need to know about the methods for lifting and movement of load relative to the specified equipment and characteristics of the load. The candidate will have to know about and understand the types of workplace hazards encountered and the working practices for dealing with them. They will need to know what the organisational and operational requirements for keeping records. The candidate will also need to know what the approved procedures and practices are in the context of the operations, the work activity and the workplace environment (organisational, regulatory, emergency, operational) and they will need to know their responsibilities under the Health and Safety Statutory Requirements

The assessor must ascertain that the candidate has a clear understanding of legislation, regulations and codes of practice relating to the lifting, transferring and positioning loads.

When assessing knowledge and understanding it would be expected that any questioning would be recorded

Performance evidence should come from observing the candidate during his or her normal and typical work activities. It should be evident that the candidate is able to prepare for movement of load. The assessor would have to be confident that the candidate does **Identify load and method of movement and can Identify potential hazards of the working area that affect the safety, operation and the activity:** *encroaching personnel, neighbouring activities, obstructions, damaged loads.* The candidate must confirm the **equipment involved:** *Identifiable category of specialised plant and machinery, lifting and transferring attachments and accessories.* They will also need to show that they confirm the equipment is suitably prepared and set up for movement of load and they check the safety and security of the work area. The assessor must also see that the candidate maintains records as required and that all aspects of the work is carried out according to **approved procedures and practices:** *organisational, regulatory, emergency, operational.*

UNIT (CDG 11) Lift, transfer and position loads

Evidence requirements (cont)

Note: range/scope of performance is highlighted in **BOLD/Italics**

Evidence from records produced and maintained by the candidate on current and previous work done to prepare for movement of load should also be readily available for the assessor to inspect.

UNIT (CDG 11)

Lift, transfer and position loads

Element 1 (11.1)

Prepare for movement of load

Additional Evidence

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (CDG 11)

Lift, transfer and position loads

Element 2 (11.2)

Lift and transfer load to its designated location

Performance Criteria

You must be able to:

- 1 Load is selected and confirmed suitable to lift.
- 2 Lifting and handling of the load is carried out safely and takes account of the load's characteristics.
- 3 Load is lifted and transferred to the designated location safely, securely and without loss or damage.
- 4 Operations are undertaken in a safe, effective and controlled manner with due regard to the **surrounding environment**.
- 5 Any loss of or damage to the load or the **surrounding environment** is reported to the appropriate person(s) and action taken in accordance with **approved procedures and practices**.
- 6 Problems and conditions outside the responsibility of the job holder are referred to an authorised person.
- 7 Work is carried out to **approved procedures and practices** and in compliance with statutory requirements.

Knowledge and Understanding

You must know and understand:

- a) the different types of loads, their characteristics and movement requirements
- b) types of specified equipment and related operating procedures
- c) methods for lifting and transferring of load relative to the specified equipment and nature of the load
- d) procedures for dealing with loss and damage to loads
- e) approved procedures and practices in the context of the operations, the work activity and the workplace environment (organisational, regulatory, emergency, operational)
- f) responsibilities under the health and safety statutory requirements

UNIT (CDG 11)

Lift, transfer and position loads

Element 2 (11.2)

Lift and transfer load to its designated location

Evidence requirements

The assessor should be confident that the outcomes have been produced by competent performance and that the candidate is capable of repeating competent performance. Evidence of competency will probably be collected over a period of time in the normal work environment or under similar conditions. Those providing witness testimony must be occupationally competent and reliable to recognise and support the evidence of competence for the candidate.

For this element evidence will be from performance, outcome of performance and questioning supported by witness testimony. The candidate will need to have knowledge and understanding of the different types of loads, their characteristics and movement requirements and the types of specified equipment and related operating procedures. They will need to know the methods for lifting and transferring of load relative to the specified equipment and the nature of the load. The candidate will need to know procedures for dealing with loss and damage to loads and what the approved procedures and practices are in the context of the operations, the work activity and the workplace environment (organisational, regulatory, emergency, operational) and they will need to know their responsibilities under the Health and Safety Statutory Requirements

The assessor must ascertain that the candidate has a clear understanding of legislation, regulations and codes of practice relating to the lifting, transferring and positioning loads.

When assessing knowledge and understanding it would be expected that any questioning would be recorded

Performance evidence should come from observing the candidate during his or her normal and typical work activities. The assessor would have to be confident that the candidate can repeatedly lift and transfer load to its designated location correctly and safely. The candidate will have to show a clear awareness of the **surrounding environment**: *property, neighbouring activities, the natural and built environment*. They will also have to show how they contribute to maintaining the safety of the working environment during carrying out the activities. The candidate will also demonstrate that all aspects of the work is carried out according to **approved procedures and practices**: *organisational, regulatory, emergency, operational*.

Note: range/scope of performance is highlighted in **BOLD/Italics**

Evidence from records produced and maintained by the candidate on current and previous work done to lift and transfer load to its designated location should also be readily available for the assessor to inspect.

UNIT (CDG 11)

Lift, transfer and position loads

Element 2 (11.2)

Lift and transfer load to its designated location

Additional Evidence

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

UNIT (CDG 11)

Lift, transfer and position loads

Element 3 (11.3)

Position and set down load

Performance Criteria

You must be able to:

- 1 Location for positioning and setting down the load is confirmed in accordance with the information and instruction.
- 2 Load is positioned, set down and released in its designated location
- 3 Operations are carried out safely, in optimum time and meet with the work requirements.
- 4 Any loss of or damage to the load or the **surrounding environment** is reported and appropriate action taken in accordance with **approved procedures and practices**.
- 5 Any incident(s) and accident(s) during movement are reported in accordance with **approved procedures and practices**.
- 6 Problems and conditions outside the responsibility of the job holder are referred to the authorised person.
- 7 Records are maintained in accordance with organisation and operational requirements.
- 8 Work is carried out to **approved procedures and practices** and in compliance with statutory requirements.

Knowledge and Understanding

You must know and understand:

- a) the different types of loads and their characteristics
- b) types of specified equipment and related operating procedures
- c) methods for positioning and setting down loads relative to the specified equipment
- d) action to be taken in the event of incident or accident
- e) organisational and operational requirements for keeping records
- f) approved procedures and practices in the context of the operations, the work activity and the workplace environment (organisational, regulatory, emergency, operational)
- g) responsibilities under the health and safety statutory requirements

UNIT (CDG 11) Lift, transfer and position loads

Element 3 (11.3) Position and set down load

Evidence requirements

The assessor should be confident that the outcomes have been produced by competent performance and that the candidate is capable of repeating competent performance. Evidence of competency will probably be collected over a period of time in the normal work environment or under similar conditions. Those providing witness testimony must be occupationally competent and reliable to recognise and support the evidence of competence for the candidate.

For this element evidence will be from performance, outcome of performance and questioning supported by witness testimony. The candidate will need to have knowledge and understanding of the different types of loads and their characteristics. They will need to know about the types of specified equipment and related operating procedures and the methods for positioning and setting down loads relative to the specified equipment. The candidate will have to know about what action is to be taken in the event of incident or accident. They will need to know what the organisational and operational requirements for keeping records. They will also need to know what the approved procedures and practices are in the context of the operations, the work activity and the workplace environment (organisational, regulatory, emergency, operational) and they will need to know their responsibilities under the Health and Safety Statutory Requirements

The assessor must ascertain that the candidate has a clear understanding of legislation, regulations and codes of practice relating to the lifting, transferring and positioning loads.

When assessing knowledge and understanding it would be expected that any questioning would be recorded

Performance evidence should come from observing the candidate during his or her normal and typical work activities. It should be evident that the candidate is able to position and set down load. The assessor would have to be confident that the candidate can manoeuvre, position and set down the load correctly and that they carry out the operation safely. The candidate will have to show a clear awareness of the **surrounding environment**: *property, neighbouring activities, the natural and built environment*. The candidate will also demonstrate that all aspects of the work is carried out according to **approved procedures and practices**: *organisational, regulatory, emergency, operational*.

Note: range/scope of performance is highlighted in **BOLD/Italics**

Evidence from records produced and maintained by the candidate on current and previous work done to position and set down load should also be readily available for the assessor to inspect.

UNIT (CDG 11)

Lift, transfer and position loads

Element 3 (11.3)

Position and set down load

Additional Evidence

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

Glossary of terms

Advisor	a person who carries out, either singly or in combination, the functions of advising a candidate, collecting evidence of his or her competence on behalf of the assessor and authenticating the work candidates have undertaken. A mentor might also provide witness testimony.
Assessment	the process of generating and collecting evidence of a candidate's performance and judging that evidence against defined criteria.
Assessor	the person designated in a Centre to be responsible for collecting evidence of candidates' competence, judging it and recording achievement.
Authentication	the process by which an advisor or assessor confirms that an assessment has been undertaken by a candidate and that all regulations governing the assessment have been observed.
Candidate	the person enrolling for an SQA qualification.
Centre	the college, training organisation or workplace where SQA qualifications are delivered and assessed.
Element of competence	statements which define the products of learning. The statements describe the activities that the candidate needs to perform in order to achieve the unit. They contain performance criteria and sometimes statements on range and evidence. (see outcome)
Evidence	materials the candidate has to provide as proof of his or her competence against specified performance criteria.
Evidence requirements	specify the evidence that must be gathered to show that the candidate has met the standards laid down in the performance criteria.
External verifier	the person appointed by the SQA who is responsible for the quality assurance of a Centre's provision. An external verifier is often appointed on a subject area basis or for cognate groups of units.
Instrument of assessment	a means of generating evidence of the candidate's performance.
Internal verifier	the person appointed from within the Centre who ensures that assessors apply the standards uniformly and consistently.
Observation	a means of assessment in which the candidate is observed carrying out tasks that reflect the performance criteria given in outcomes.
Outcome	statement which defines the products of learning. They describe the activities the candidate has to perform to achieve the unit, and contain performance criteria, and, sometimes, statements on range and evidence (see elements of competence).
Performance criteria	statements which describe the standard to which candidates must perform the activities which are stated in the outcome.

Portfolio	a compilation of evidence which can form the basis for assessment. The portfolio is commonly used in NVQ awards and in alternative routes to assessment such as APL and credit transfer.
Product evaluation	a means of assessment which enables the quality of a product produced by the candidate, rather than the process of producing it, to be evaluated.
Range/Scope	a statement in the unit which specifies the different contexts in which the activities described in the outcome have to be demonstrated. Where they appear, range/scope statements are mandatory.

Section 4 — Blank recording forms

This section consists of the blank forms referred to in Section 2 for you to photocopy. You may find these useful when compiling your portfolio.

Portfolio title page

Your name: _____

Job title: _____

Name of Employer/
Training Provider/
College: _____

Their address: _____

Tel no: _____

NVQ: _____

Level: _____

Units submitted for assessment:

Mentor: _____

(Please provide details
of Mentor's experience) _____

Assessor: _____

Date: _____

Personal profile

Name

Address

Postcode

Tel no **Home:** **Work:**

Job title

Description of your current job **Relevant experience**

Previous work experience

Qualifications and training

Continued overleaf

**Qualifications and Training
(continued)**



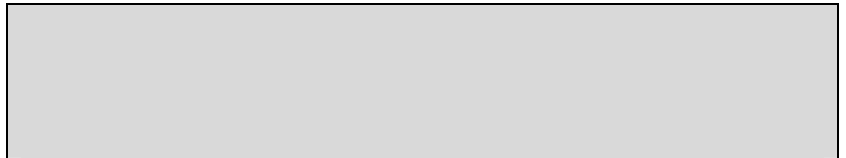
Voluntary work/interests



**Name of Employer/Training
Provider/College**



Address



Postcode



Tel no



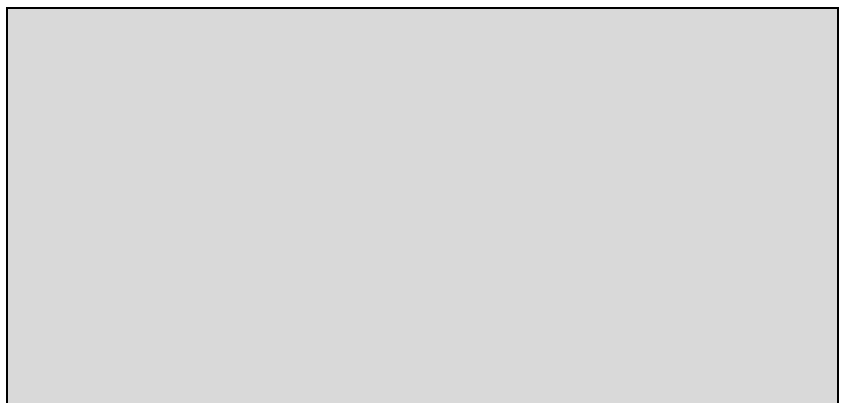
Type of Business



Number of Staff



**Structure of organisation
(include chart or diagram if
available)**



Contents checklist

You might also find it useful to complete the following checklist as you work your way through your portfolio. This will help you to see if you have included all the relevant items. Once you have completed your portfolio, you will be able to use this checklist again as a contents page, by inserting the relevant page or section numbers in the right hand column.

	Completed?	Page/Section number
Title page for the portfolio	<input type="checkbox"/>	
Personal profile		
<ul style="list-style-type: none"> • your own personal details 	<input type="checkbox"/>	
<ul style="list-style-type: none"> • a brief CV or career profile 	<input type="checkbox"/>	
<ul style="list-style-type: none"> • description of your job 	<input type="checkbox"/>	
<ul style="list-style-type: none"> • information about your employer/training provider/college 	<input type="checkbox"/>	
Unit Assessment Plans	<input type="checkbox"/>	
Unit progress record	<input type="checkbox"/>	
Completed Element Achievement Records for each unit		
<ul style="list-style-type: none"> • signed by yourself, your assessor and the internal verifier (where relevant) 	<input type="checkbox"/>	
<ul style="list-style-type: none"> • Evidence reference numbers included 	<input type="checkbox"/>	
Index of evidence (with cross-referencing information completed)	<input type="checkbox"/>	
Evidence (with reference numbers)		
<ul style="list-style-type: none"> • observation records 	<input type="checkbox"/>	
<ul style="list-style-type: none"> • details of witnesses (witness testimony sheets) 	<input type="checkbox"/>	
<ul style="list-style-type: none"> • personal statements 	<input type="checkbox"/>	
<ul style="list-style-type: none"> • products of performance 	<input type="checkbox"/>	

Personal statement

Date	Evidence index number	Details of statement	Links to other evidence (enter numbers)	Units, elements, pcs, and range covered

Candidate signature: _____

Date: _____

Observation record

Unit/Element(s): _____

Candidate: _____ Date of observation: _____

Evidence index number: _____

Skills/activities observed:	PCs and range covered:

Knowledge and understanding apparent from this observation:

Other units/elements to which this evidence may contribute:

Assessor comments and feedback to candidate:

I can confirm the candidate's performance was satisfactory.

Assessor's signature: _____ Date: _____

Candidate's signature: _____ Date: _____

Record of questions and candidate's answers

Unit:	Element(s):
Evidence index number:	
Circumstances of assessment:	
List of questions and candidate's responses: Q: A: Q: A: Q: A: Q: A: Q: A:	
Assessor's signature:	Date:
Candidate's signature	Date:

UNIT:

Element

Notes/Comments

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met

Candidate: _____

Date: _____

Assessor: _____

Date: _____

Internal Verifier: _____

Date: _____

