

Logbook for candidates

NVQ

Edexcel Level 3 NVQ in Road Passenger Transport
Operations

November 2009

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Section 1: Edexcel Level 3 NVQ in Road Passenger Transport Operations

Introduction

This document contains information specific to the Edexcel Level 3 NVQ in Road Passenger Transport Operations. It should be read in conjunction with the *Edexcel NVQ guidance for candidates* that will be provided by your assessor.

National Occupational Standards and NVQs

The standards, assessment strategy and qualification structures for Road Passenger Transport Operations are owned by GoSkills, who reviewed these National Occupational Standards. The NVQs have been developed from the National Occupational Standards.

The Edexcel Level 3 NVQ in Road Passenger Transport Operations gives recognition of candidates' skills, knowledge and understanding. It allows candidates to gain a qualification in the workplace that relates to their job and promotes good working practice.

You can contact the Sector Skills Council (SSC) at:

GoSkills
Concorde House
Trinity Park
Solihull
West Midlands B37 7UQ

Telephone: 0121 635 5520
Fax: 0121 635 5521
Email: info@goskills.org
Website: www.goskills.org

NVQs designed to be assessed in the workplace, or in conditions resembling the workplace. However, simulation of real working practice might be permitted. Where this is allowed it will be shown in the individual units, within the standards that are in this logbook.

Simulation must be carried out in conditions resembling the workplace. These conditions are described as being a 'realistic working environment' (RWE).

Which Edexcel NVQs in Road Passenger Transport Operations are available?

Edexcel NVQs in Road Passenger Transport Operations are available as follows:

- Edexcel Level 2 NVQ in Road Passenger Transport Operations
- Edexcel Level 3 NVQ in Road Passenger Transport Operations.

In addition to these NVQs, other Edexcel NVQs in the Road Passenger Transport suite are available as follows:

- Edexcel Level 2 NVQ in Road Passenger Vehicle Driving
- Edexcel Level 2 NVQ in Passenger Carrying Vehicle Driving (Bus and Coach)
- Edexcel Level 3 NVQ for Managing in Road Passenger Transport
- Edexcel Level 4 NVQ for Managing in Road Passenger Transport.

It is important that you select the most appropriate level related to your work role.

Who is this Edexcel NVQ for?

This NVQ is intended for people who are employed in providing a passenger transport operations service by road, for example:

- Passenger Check-In Officer
- Passenger Services Supervisor
- Road Transport Manager
- Transport Planner or Scheduler.

What progression opportunity does this Edexcel NVQ offer me?

NVQ qualifications allow candidates to progress within employment, to other NVQs or to vocationally-related qualifications.

Candidates completing the Edexcel Level 3 NVQ in Road Passenger Transport Operations may wish to progress onto another NVQ within the Road Passenger Transport suite such as the:

- Edexcel Level 3 NVQ for Managing in Road Passenger Transport
- Edexcel Level 4 NVQ for Managing in Road Passenger Transport

or onto generic management qualifications such as the:

- Edexcel Level 2 NVQ in Team Leading
- Edexcel Level 3 in Management
- Edexcel Level 4 in Management.

What is the structure of the Edexcel Level 3 NVQ in Road Passenger Transport Operations?

To achieve the whole qualification at Level 3, you must prove competence in **four** mandatory units and **five** option units.

You must choose **one** unit from Section A and **one** unit from Section B, plus **three** further option units from any of the units available in Sections A or B.

Note: a maximum of **three** units only is permissible from Section A.

Mandatory units for the Edexcel Level 3 NVQ in Road Passenger Transport Operations

You must achieve **all** of the units listed below.

Unit number	Title	Element number	Title
Unit 4	Ensure Health and Safety and Deal with Incidents, Accidents and Emergencies in Your Work Environment in Road Passenger Transport Operations	4.1	Identify Hazards and Assess Risks to Health and Safety
		4.2	Take Action to Deal with Incidents, Accidents and Emergencies
		4.3	Limit Risk of Injury or Harm to People and Property
Unit 5	Develop Productive Working Relationships with Colleagues		
Unit 6	Manage Operator Risks and Liabilities in Road Passenger Transport Operations	6.1	Plan and Implement Due Diligence
Unit 7	Provide Leadership for Your Team		

Option units for the Edexcel Level 3 NVQ in Road Passenger Transport Operations

You must choose **one** unit from Section A and **one** unit from Section B, plus **three** further option units from any of the units available in Sections A or B.

Note: a maximum of **three** units only is permissible from Section A.

Section A option units

Unit number	Title	Element number	Title
Unit 3	Provide Professional Customer Service in Road Passenger Transport Operations	3.1	Follow Dress and Behaviour Codes
		3.2	Develop Professional Relationships with Customers
		3.3	Communicate Effectively with Customers
Unit 9	Develop and Maintain Your Work Skills and Knowledge in Road Passenger Transport Operations	9.1	Develop and Maintain Your Work Skills and Knowledge
Unit 10	Manage Conflict in Road Passenger Transport Operations	10.1	Assess Situations and Decide on Action Needed
		10.2	Take action to Deal with Conflict
Unit 12	Support Learners by Mentoring in the Workplace	12.1	Plan, Provide and Maintain the Mentoring Process
Unit 13	Resolve Customer Service Problems	13.1	Spot Customer Service Problems
		13.2	Pick the Best Solution to Resolve Customer Service Problems
		13.3	Take Action to Resolve Customer Service Problems
Unit 14	Process Customer Service Complaints	14.1	Recognise the Signs that a Query or Problem is About to Produce a Complaint
		14.2	Deal with a Complaint Effectively
Unit 18	Support Customer Service Improvements	18.1	Use Feedback to Identify Potential Customer Service Improvements
		18.2	Implement Changes in Customer Service
		18.3	Assist with the Evaluation of Changes in Customer Service

Section B option units

Unit number	Title	Element number	Title
Unit 28	Allocate and Check Work in Your Team		
Unit 29	Manage and Administer Small Businesses in Road Passenger Transport Operations	29.1	Plan and Operate a Small Business
		29.2	Manage Accounting and Administration Functions
Unit 30	Plan Timetables for Scheduled Road Passenger Transport Services	30.1	Prepare New and Modified Timetables
Unit 31	Plan Road Passenger Transport Routes for Customers	31.1	Understand a Customer's Journey
		31.2	Communicate with Customers About Routes
Unit 32	Plan Road Passenger Transport Schedules	32.1	Plan the Scheduling of Road Passenger Transport
Unit 33	Generate Sales of Products and Services in Road Passenger Transport Operations	33.1	Identify Contacts to Make and Increase Sales
		33.2	Sell Road Passenger Transport Products and Services
		33.3	Evaluate Your Success in Increasing Sales
Unit 34	Manage and Store Information	34.1	Use, Research and Store Information
		34.2	Present Information
Unit 35	Supervise the Cleaning of Road Passenger Transport Vehicles	35.1	Supervise the Effective Cleaning of Vehicles
		35.2	Ensure Good Health and Safety Practices are Maintained when Cleaning the Vehicle
Unit 36	Improve the Customer Service Relationship	36.1	Improve Communications with Your Customers
		36.2	Balance the Needs of Your Customer and Your Organisation
		36.3	Exceed Customer Expectations to Develop the Relationship
Unit 37	Operate an IT System in Road Passenger Transport Operations	37.1	Use an IT System

Section 2: Worked examples of forms

This section should be read alongside the *Edexcel NVQ guidance for candidates*, which you should get from your assessor. This publication provides a full explanation about:

- NVQ qualifications and how they are assessed
- what evidence is and how you can collect it
- how to build your portfolio logbook
- how to use each recording form.

This is also available on the Edexcel website at:

- www.edexcel.com/quals/nvq/rpt

Collecting your evidence

This section contains completed examples of the forms you, your assessor and the internal verifier will use while you are undertaking your Edexcel Level 3 NVQ in Road Passenger Transport Operations.

The forms are:

- Form 1: Portfolio title page
- Form 2: Personal profile
- Form 3: Contents checklist
- Form 4: Index of evidence
- Form 5: Unit assessment plan
- Form 6: Unit progress and sign-off record
- Form 7: Element achievement record
- Form 8: Knowledge evidence record
- Form 9: Personal statement
- Form 10: Observation record
- Form 11: Witness testimony
- Form 12: Expert witness evidence record
- Form 13: Record of questions and candidate's answers.

You will find a detailed description on how to use these forms in the *Edexcel NVQ guidance for candidates*.

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.

Example form 1 – Portfolio title page

Name: Mr John Wilson	
Job title: Shift supervisor/controller	
Name of employer/training provider/college: Speedy Private Hire	
Their address: 57 Old Course Road, Sandcastle, Oldshire	
Postcode: SO38 6XL	
Telephone number (Home): 01234 567890	(Work): 01234 567890
Email address: jwilson@speedyph.co.uk	Fax number: 01234 567891
NVQ: Road Passenger Transport Operations	
Level: 3	
Units submitted for assessment:	
Unit 4 - Ensure Health and Safety and Deal with Incidents, Accidents and Emergencies in Your Work Environment in Road Passenger Transport Operations	
Unit 5 - Develop Productive Working Relationships with Colleagues	
Unit 6 - Manage Operator Risks and Liabilities in Road Passenger Transport Operations	
Unit 7 - Provide Leadership for Your Team	
Unit 10 - Manage Conflict in Road Passenger Transport Operations	
Unit 12 - Support Learners by Mentoring in the Workplace	
Unit 18 - Support Customer Service Improvements	
Unit 34 - Manage And Store Information	
Unit 35 - Supervise The Cleaning Of Road Passenger Transport Vehicles	
Mentor: Peter Coach	
(Please provide details of mentor's experience):	
Line manager with 15 years' experience in the taxi and private hire industry. Undertaken a number of in-company training courses, including Auriga Evocab and customer service principles. Peter has also studied and successfully gained the ECDL Level 1 and 2 ITQ Awards and recently obtained his internal verifier award.	
Assessor: Glen Carr	Date: 06.01.09

Example form 2 – Personal profile

Name: Mr John Wilson	
Address: 18 The Fairways, Sandcastle, Oldshire	
Postcode: SO57 6XL	
Telephone number (Home): 01234 567890	(Work): 01234 567890
Email address: jwilson@speedyph.co.uk	Fax number: 01234 567891
Job title: Shift supervisor/controller	
Relevant experience	
Description of your current job:	
<p>I work as a night shift supervisor/controller in a large private hire company. My hours of work are from 10 pm to 6 am. During my shift I can be responsible for up to 15 operators who will be processing incoming calls, taking bookings and dispatching drivers. Co-ordinating the allocation of dispatch work is one of my responsibilities, including a front desk for customers who 'drop in' and request a vehicle booking. During busy periods it can become very stressful as many customers want a vehicle almost immediately; if vehicles are a few minutes late the operators come under intense pressure from customers whose vocal tone and manner can be upsetting and abusive. Where difficulties arise between operators, customers or drivers it will be my responsibility to resolve any difficulties or disputes, to 'take the heat out of situations' and smooth things over, and ensure that customer service is maintained.</p> <p>At times I will be asked to train a new operator in our computerised dispatch system; I enjoy this type of work and take great satisfaction in seeing a new member of staff learning on the job and acquiring new skills.</p> <p>Corporate account customers are important to a private hire company as they bring regular income and work to the drivers. I will often be asked by my manager to provide feedback or opinion on suitable drivers who may be asked to undertake school runs or other sensitive work such as social service contracts and NHS work.</p> <p>Other responsibilities include routinely checking drivers' badges, driver licenses, vehicle plates, MOTs and valid insurance for expiry dates. I send each driver a reminder of the relevant expiry dates to his datahead; if in the unusual event they forget to renew an essential document I have the authority to prevent the driver logging on and therefore barring them from further work.</p> <p>Summarising I see my job role as sharing skills and leading by example.</p>	
Previous work experience or attach copy of a current CV:	
4 years - telephone operator/dispatcher	
3 years - taxi driver	

continued overleaf ...

Qualifications and training and/or attach copy of a current CV:

5 GCSEs

BTEC Award in Transporting Passengers by Taxi and Private Hire

Auriga Systems - Evocab Training; Motorola training, ECDL Level 1

NEBOSH Award in Health and Safety at Work

Voluntary work/interests: Golfing and gardening

Name of employer/training provider/college: Speedy Private Hire

Address: 57 Old Course Road, Sandcastle, Oldshire

Postcode: SO38 6XL

Telephone number (Work): 01234 567890

Fax number: 01234 567891

Email address: jwilson@speedyph.co.uk

Type of business, if employer:

Private hire operator with 350 vehicle fleet including four executive vehicles, two funeral cars, two minibuses for social service work and 25 wheelchair accessible vehicles.

Number of staff: 25 full- and part-time staff

Structure of organisation (including chart or diagram if available):

Management and HR - 6

Shift supervisors - 4

Drivers and cleaners - 4 full time employed

Telephonists and dispatchers - 8-15 full- and part-time

Sub-contracted drivers - 75+ full- and part-time

Example form 3 – Contents checklist

NVQ title: Edexcel Level 3 in Road Passenger Transport Operations		
Candidate: Mr John Wilson		
	Completed?	Page/section number
Title page for the portfolio	y	1
Personal profile <ul style="list-style-type: none"> • your own personal details • a brief CV or career profile • description of your job • information about your employer/training provider/college 	 y y y y	 2 3 3 3
Summary of the units		1
Completed units <ul style="list-style-type: none"> • signed by yourself, your assessor and the internal verifier (where relevant) • reference numbers included • unit assessment plans 	 y y y	 8 8 6
Unit progress records		8
Index of evidence (with cross-referencing information completed)		5
Evidence (with reference numbers) <ul style="list-style-type: none"> • observation records • details of witnesses (witness testimony sheets) • personal statements 	 y y y	 6-15 6-16/17 6-14

Example form 4 – Index of evidence

NVQ title and level: Edexcel Level 3 in Road Passenger Transport Operations				
Candidate: Mr John Wilson				
Evidence number	Description of evidence	Included in portfolio (Yes/No) <i>If No, state location</i>	Units/elements evidence links to <i>(give specific numbers, eg 5.2.1)</i>	Internal verifier signature and date of sampling
3	Personal statement	Yes	10; 10.1, 10.2	Ian Copley 10.9.09
4	Observation record	Yes	35; 35.1	Ian Copley 25.9.09
11	Witness testimony	Yes	4; 4.2	Ian Copley 18.7.09
15	Expert witness	Yes	6; 6.1	Ian Copley 10.7.09
22	Record of questions and answers	Yes	18; 18.1	Ian Copley 26.9.09

Example form 5 – Unit assessment plan

NVQ title: Edexcel Level 3 in Road Passenger Transport Operations			
Unit: Unit 4 - Ensure Health and Safety and Deal with Incidents, Accidents and Emergencies in Your Work Environment in Road Passenger Transport Operations			
Candidate: Mr John Wilson		Assessor: Glen Carr	
Normal working activities performed			
Typical evidence	Work area	Expected completion date	Links to other units/ elements
Element: 4.1 Identify Hazards and Assess Risks in the Workplace			
Observations, witness testimony, hard copy inspection notes on routine inspections of workplace hazards including fire, electrical, transport and manual handling	General office, booking areas, vehicle parking, disability access, fire evacuation access and mustering points	15/02/09	6; 6.1
Element: 4.2 Take Action to Deal with Incidents, Accidents and Emergencies			
Witness testimony, customer testimonial, professional discussion, Q&A, company procedures	Control room, computer workstation and company private phone line to drivers and clients	17/03/09	6; 6.1
Element: 4.3 Limit the Risk of Injury or Harm to People and Property			
Witness testimony, taped professional discussion, copy of typed reports to management	Control room, computer workstation, senior management meeting room		6; 6.1 5

continued overleaf ...

Typical evidence	Work area	Expected completion date	Links to other units/elements
Activities needing to be performed			
Element: 4.1 Identify Hazards and Assess Risks in the Workplace			
Three health and safety inspection reports to management including details on legal implications, cost benefits and possible disruption to the business	Control room, booking office, customer facilities, washbays, first aid post, company vehicles, on board disability equipment	25/04/09	
Element: 4.2 Take Action to Deal with Incidents, Accidents and Emergencies			
Evidence that you can take decisions that will safeguard passengers, vehicles and company standing by implementing and following through on action plans, contingency plans, and emergency procedures	Workstation, control room connected to schools, parents or guardians, local authorities, licensing officers and emergency services	15/05/09	
Element: 4.3 Limit the Risk of Injury or Harm to People and Property			
Presentation to management of health and safety inspections/reports with recommendations on possible areas of improvement	Management meeting/board room	10/06/09	
<p>Additional comments</p> <p>In this unit John has to demonstrate that he has the knowledge and experience to undertake health and safety inspections and be able to respond to incidents and emergencies. Evidence of health and safety checks, following H&S company procedures, contingency planning and assisting management in their statutory duties to limit risk. Verbal questioning and answers (taped) will be used to cover the knowledge content.</p>			
Assessor's signature: Glen Carr		Date: 30.06.09	
Candidate's signature: John Wilson		Date: 30.06.09	

Example form 6 – Unit progress and sign-off record

NVQ title and level: Edexcel Level 3 in Road Passenger Transport Operations									
Candidate: Mr John Wilson									
Assessor: Glen Carr									
To achieve the whole qualification, you must prove competence in four mandatory units and five option units.									
Unit checklist: list here the units you will be undertaking, then circle the reference number of each unit as you complete it.									
Mandatory	4	5	6	7					
Sections A, B and C	18	34							
Option	10	12	35						

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

Mandatory units			
Unit number	Title	Assessor's signature	Date
4	Ensure Health and Safety and Deal with Incidents, Accidents and Emergencies in Your Work environment in Road Passenger Transport Operations	Glen Carr	30.6.09
5	Develop Productive Working Relationships with Colleagues	Glen Carr	5.7.09
6	Manage Operator Risks and Liabilities in Road Passenger Transport Operations	Glen Carr	6.8.09
7	Provide Leadership for Your Team	Glen Carr	9.9.09

continued overleaf ...

Example form 7 – Element achievement record

NVQ title and level: Edexcel Level 3 in Road Passenger Transport Operations					
Candidate: Mr John Wilson					
Assessor: Glen Carr					
Unit title: Unit 5: Develop Productive Working Relationships with Colleagues					
Element: No elements or range					
Performance criteria: You need to show that:		<i>(Assessor to insert date each time competence is demonstrated)</i>			
1	Establish working relationships with all colleagues who are relevant to the work being carried out	1.4.09	5.5.09		
2	Recognise, agree and respect the roles and responsibilities of colleagues	1.4.09	5.5.09		
3	Understand and take account of the priorities, expectations and authority of colleagues in decisions and actions				
4	Fulfil agreements made with colleagues and let them know	1.4.09	5.5.09		
5	Advise colleagues promptly of any difficulties, or where it will be impossible to fulfil agreements				
6	Identify and sort out conflicts of interest and disagreements with colleagues in ways that minimise damage to the work being carried out				
7	Exchange information and resources with colleagues to make sure that all parties can work effectively				
8	Provide feedback to colleagues on their performance and seek feedback from colleagues on your own performance in order to identify areas of improvement				

continued overleaf ...

Evidence requirements:				
Evidence over an extended period that on at least three occasions you were able to demonstrate that you took positive measures to develop productive relationships with working colleagues: <ul style="list-style-type: none"> • testimonials • witness statements • written memos, correspondence, information exchange. 				
Professional discussion on behaviours that underpin effective performance				
Range: No range given, examples provided	<i>(Use the boxes to record range with reference to element requirements)</i>			
New employee				
Existing team members				
Written and verbal communication				
Holidays, work rotas, grievances, training, appraisals				
Feedback/comments: <p>To date you have approached this element with enthusiasm and commitment. Please complete the action plan we agreed within the date I have proposed. I see no problems in completing this element and unit within the target date.</p>				
Assessor's signature: <i>Glen Carr</i>			Date: 2.10.09	
Candidate's signature: <i>John Wilson</i>			Date: 2.10.09	

Example form 8 – Knowledge evidence record

NVQ title and level: Edexcel Level 3 in Road Passenger Transport Operations									
Candidate: John Wilson					Assessor: Glen Carr				
<p>Unit title: Manage Operator Risks and Liabilities in Road Passenger Transport Operations</p> <p>You must show that you have the knowledge and understanding for this unit. Your performance evidence might help to show this, but it is likely that you will need additional evidence (eg answers to questions). The National Occupational Standards detail the knowledge and understanding required to carry out competent practice for the performance described in this unit.</p> <p>When using the standards it is important to read the knowledge requirements in relation to expectations and requirements of your job role.</p> <p>You need to show that you know, understand and can apply in practice:</p>									
Knowledge and understanding for this unit:	Type of evidence								
	EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
a The legislation and codes of practice/bye laws that apply to your business, eg CPC for PCV drivers, 'O' licence for PSV/PCV									y
b The evidence required to comply with legislative and other requirements, eg evidence to work in the UK, CRB checks, valid driving licence, MOT tests etc							5.6.09		
c How to develop and implement procedures to ensure compliance with legislative and other requirements									y
d How to operate an effective administration system for the checking and, monitoring and storing of relevant information							7.6.09		
e The importance and implementation of an effective data protection system, eg compliance with the Data Protection Act 1998							3.8.09		
f The role and powers of those in authority, eg enforcement officers and police etc with regard to operating a passenger carrying service				y					
g The consequences of non-compliance				y					
h The purpose and importance of due diligence				y					

continued overleaf ...

Feedback/comments:

You have successfully completed the knowledge evidence for Unit 6 Element 6.1 We will now update your assessment plan to complete the remaining part of this unit.

The candidate has satisfied the assessor and the internal verifier that the performance evidence and criteria, the range, and knowledge and understanding requirements have been achieved.

Candidate's signature: John Wilson

Date: 1.6.09

Assessor's signature: Glen Carr

Date: 1.6.09

Internal verifier's signature: Ian Copley

Date: 15.6.09

COLUMN KEY:	EI = EVIDENCE INDEX NUMBER	O = OBSERVATION	P = PERSONAL STATEMENT
	WT = WITNESS TESTIMONY	S = SIMULATION	APEL = ACCREDITATION OF PRIOR EXPERIENCE AND LEARNING
	Q&A = QUESTIONS & ANSWERS	EWE = EXPERT WITNESS EVIDENCE	PD = PROFESSIONAL DISCUSSION

Example form 9 – Personal statement

NVO title and level: Edexcel Level 3 in Road Passenger Transport Operations				
Unit/element(s): 10/10.1, 10.2				
Candidate: John Wilson				
Purpose of statement: To support the knowledge and understanding evidence for Unit 10				
Evidence index number: 3				
Date	Evidence index number	Details of statement	Links to other evidence (enter numbers)	Units, elements and PCs covered
27.7.09	3	<p>Control room staff can have a particularly difficult time in appeasing impatient customers who have booked a vehicle and for a variety of justifiable reasons it is running a few minutes late.</p> <p>Usually it takes the form of abusive language, though it can lead to shouting and some personal threats.</p> <p>Staff are trained to handle impatient callers, this is to ensure that good customer service is maintained, however there will be times when I will personally take charge of the situation. This will involve making a decision whether the client is intoxicated and liable to be a danger to our driver.</p> <p>I would contact the driver and inform him or her that I am ready to abort the booking for the following reasons.</p> <ul style="list-style-type: none"> • Unable to guarantee their safety • There is likelihood that the vehicle will be fouled • There is strong possibility that the customer will try to 'bilk' the fare (run off without paying) <p>Customers who have abused our staff or drivers, or have run off etc will be entered on a 'blacklist' which I have the authority to maintain and update. These people are barred from booking or hiring vehicles.</p>		<p>10; 10.1 PC 1, 2, 3, 4, 5, 6, 8</p> <p>10; 10.2 PC 1, 2, 3, 5, 7</p>
Candidate's signature: John Wilson			Date: 10.9.09	
Assessor's signature: Glen Carr			Date: 10.9.09	

Example form 10 – Observation record

NVQ title and level: Edexcel Level 3 in Road Passenger Transport Operations	
Unit/element(s): 35.1 Supervise the Cleaning of Road Passenger Transport Vehicles	
Candidate: John Wilson	Date of observation: 21.09.09
Evidence index number: 4	
Skills/activities observed:	PCs and range covered:
Giving instructions in a clear and concise manner, ensuring safe practices are observed, all vehicles cleaned internally and externally to a professional standard	35.1 (1, 2, 3, 4, 5)
Knowledge and understanding apparent from this observation:	
Knowledge of the Health and Safety at Work Act and the COSHH regulations	
Other units/elements to which this evidence may contribute:	
35.2	
Assessor comments and feedback to candidate:	
Your performance in this observation was very good; you ensured that the drivers were operating the power washer correctly and they were wearing personal protection to guard against chemical and high pressure spray. The vehicles were cleaned to a standard expected by the licensing authority and the travelling public.	
I can confirm the candidate's performance was satisfactory.	
Assessor's signature: Glen Carr	Date: 21.09.09
Candidate's signature: John Wilson	Date: 21.09.09

Example form 11 – Witness testimony

NVQ title and level: Edexcel Level 3 in Road Passenger Transport Operations	
Candidate name: John Wilson	
Evidence index number: 11	
Where applicable, evidence number to which this testimony relates:	
Unit: 4	
Element(s): 4.1	
Range: PC 1-7	
Date of evidence: 17.3.09	
Witness name: Karen Callis	
Relationship to candidate: Line manager	
<p>Details of testimony:</p> <p>I have worked with John for 3 years, during that time he has successfully undertaken routine safety inspections; where there was a possible health and safety risk to staff or customers this was duly noted and if the risk was immediate John dealt with it by quickly isolating the hazard or risk.</p> <p>During his shift John has responsibility for safety inspections, accident book details, first aid replenishment and any evacuation procedures. All of which John has carried out successfully.</p>	
I can confirm the candidate's evidence is authentic and accurate.	
Witness signature: Karen Callis	
Name: Karen Callis	Date: 17.03.09
Contact telephone number: 01234 567890	
<i>Please tick (✓) the appropriate box.</i>	
<input type="checkbox"/>	QUALIFIED AS AN ASSESSOR FOR WORKPLACE PERFORMANCE
<input checked="" type="checkbox"/>	FAMILIAR WITH THE NVQ STANDARDS TO WHICH THE CANDIDATE IS WORKING

Example form 12 – Expert witness evidence record

NVQ title and level: Edexcel Level 3 in Road Passenger Transport Operations	
Candidate name: John Wilson	
Evidence index number: 15	
Where applicable, evidence number to which this testimony relates:	
Unit: 6	
Element(s): 6.1	
Date of evidence: 10.07.09	
Expert witness name: Mr Driver	
Relationship to candidate: Manager and owner of Speedy Private Hire	
<p>Details of testimony:</p> <p>Most of our drivers are self-employed, however when they contract with our company we have to ensure that as an operator we operate within the law. John has responsibility for ensuring that new and existing drivers are working within the law, this requires John to ensure that:</p> <ul style="list-style-type: none"> • their CRB check and medical is completed and they have a driver licence • they are registered with the ISA if working a school run • their vehicle is licensed and has a current MOT • they know their local licensing conditions and statutory regulations. <p>John maintains a database of all expiry dates of drivers licence details, MOTs and forthcoming medicals for those aged 45 and over. John diligently contacts each driver through their on-board data-head to inform them of forthcoming expiry dates so that they and our company remain within the law.</p> <p>John's dedication to his work has kept our company within the law and given the local licensing authority the confidence to extend our operator licensing period.</p>	
I can confirm the candidate's evidence is authentic and accurate.	
Expert witness signature: David Driver	
Name: David Driver (manager)	Date: 10.7.09
Contact telephone number: 01234 567 890	
<i>Please tick (✓) the appropriate box.</i>	
<input type="checkbox"/>	QUALIFIED AS AN ASSESSOR FOR WORKPLACE PERFORMANCE
<input checked="" type="checkbox"/>	RELEVANT PROFESSIONAL WORK ROLE THAT INVOLVES EVALUATING EVERYDAY STAFF PRACTICE
<input type="checkbox"/>	CURRENT EXPERTISE
<input checked="" type="checkbox"/>	FAMILIAR WITH THE NVQ STANDARDS TO WHICH THE CANDIDATE IS WORKING

Example form 13 – Record of questions and candidate’s answers

NVQ title and level: Edexcel Level 3 in Road Passenger Transport Operations	
Candidate name: John Wilson	
Unit: 18	Element(s): 18.1
Evidence index number: 22	
Circumstances of assessment: These questions are to clarify some of the points and issues that arose during our professional discussion on customer service improvements.	
List of questions and candidate’s responses:	
Q: Will you explain in more detail how you obtain customer feedback to improve your service to your clients? A: Both our account customers and a randomised selection of private hire customers are contacted regularly by phone/questionnaire to ask their opinion of our service. This information is used to identify weaknesses in our system such as the need for driver training or the requirement for more accessible vehicles.	
Q: How is the customer experience influenced by the way the service is delivered? A: A customer wants to see excellent customer service, this will include a friendly and informative booking system, that customer details are accurate as regards destination, a quick response time (within 10-12 minutes), competitive pricing, and a courteous driver who is obliging and helpful.	
Q: Are there any other ways you could improve the service based on information and feedback you have gathered? A: While the company has invested heavily in modern booking and dispatch systems there are still opportunities in Autobook and I-booking to make hiring a vehicle more flexible and responsive to the customer.	
Assessor’s signature: Glen Carr	Date: 26.9.09
Candidate’s signature: John Wilson	Date: 26.9.09

Section 3: Logbook

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Mandatory units

Unit summary sheet

Unit 4: Ensure Health and Safety and Deal with Incidents, Accidents and Emergencies in Your Work Environment in Road Passenger Transport Operations

What is the unit about?

This unit is about ensuring health and safety in your work environment and dealing with incidents and emergencies. You should be able to identify hazards you may come across while at work, assess the risks, and limit the danger to yourself and others and damage to property. You should know and understand what the risks are, how to record them and what action you are authorised to take to limit danger. You should be able to recognise the need for, and to take, appropriate action to deal with incidents and emergencies within the limits of your responsibility.

This unit consists of three elements:

- Element 4.1: Identify Hazards and Assess Risks to Health and Safety
- Element 4.2: Take Action to Deal with Incidents, Accidents and Emergencies
- Element 4.3: Limit Risk of Injury or Harm to People and Property.

Element 4.1

This element is about how you identify typical hazards you may come across during your normal work. These hazards could relate to features where you work, your work activities, or other dangerous situations. It covers how you assess the levels of risk, those people that may be at risk and preventative measures that you can take to reduce the risk. The risks could be either actual or possible threats to life, health, property or the environment. You may identify hazards while routinely observing the work area, equipment or safety records, or you may simply come across the hazard by chance. The type of immediate action you may have to take includes evacuating the work area, isolating the cause of the risk, reporting the risk, or stopping operations. You should be able to record details of the risk where appropriate, and get help if you are having difficulty in deciding the level of risk to health and safety.

Element 4.2

This element is about how you take appropriate action to deal with emergencies, incidents or accidents including fire evacuation, suspect packages and security alerts. The action you take should be in line with approved organisational, relevant legal or local procedures or guidelines and should always be within your ability and authority. While taking action you should maintain customer service standards. In situations outside your ability or authority you should know where and how to get help from, for example, the emergency services, colleagues, other operators and organisations which provide help. You should also be able to report details of emergencies, incidents or accidents and any action you have taken.

Element 4.3

This element is about how you show you are able to limit the risk of injury or harm to people and property arising from incidents, accidents or emergencies such as equipment breaking down, the actions of other people, fire or environmental dangers. You will be expected to take immediate and effective action to limit the risk and keep to approved instructions or guidelines where appropriate. You must not increase the risk to yourself or others. Any action you take should be within your authority and ability. You should be able to get help from the appropriate person when you cannot take effective action to limit the risk. This help could be either from your own organisation or from within one of the authorities. It is also important that you can give clear instructions or information to others so they can take appropriate action.

Who this unit is for

This unit is for all those people working in road passenger transport operations primarily at supervisory or management level.

Glossary

Your organisation

This would be the company you work for or, if you are self employed, the rules you have set for yourself to ensure that you comply with relevant legal and licensing requirements.

Accident

An action resulting in harm/injury to yourself or others.

Incident

A 'near miss' with no harm/injury to yourself or others.

Links to other units

This unit is based on units 1 and 5 from the GoSkills Road Passenger Vehicle Driving suite.

Element achievement record

NVQ title and level: Edexcel Level 3 NVQ in Road Passenger Transport Operations				
Candidate:				
Assessor:				
Unit title: Unit 4 Ensure Health and Safety and Deal with Incidents, Accidents and Emergencies in Your Work Environment in Road Passenger Transport Operations				
Element: 4.1 Identify Hazards and Assess Risks to Health and Safety				
Performance criteria: You must be able to:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
1	recognise your statutory duties and liabilities relating to health and safety			
2	identify hazards and the level of actual and possible risk to health and safety in your normal workplace			
3	decide on the level of risk, and who may be affected by that risk			
4	get help from an appropriate person when you are not certain of the level of the risk			
5	identify preventative action that reduces, as far as possible, the risk and any possible effects of the risk			
6	record enough details of the risks so that appropriate future action can be taken			
7	report full and accurate details of risks to the appropriate person.			

Feedback/comments:	
Assessor's signature:	Date:
Candidate's signature:	Date:

Element achievement record

NVQ title and level: Edexcel Level 3 NVQ in Road Passenger Transport Operations				
Candidate:				
Assessor:				
Unit title: Unit 4 Ensure Health and Safety and Deal with Incidents, Accidents and Emergencies in Your Work Environment in Road Passenger Transport Operations				
Element: 4.2 Take Action to Deal with Incidents, Accidents and Emergencies				
Performance criteria: You must be able to:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
1	take action to deal with emergencies, incidents or accidents in line with your organisation's procedures and guidelines			
2	make sure the action you plan to take, wherever possible, meets your organisation's guidelines or procedures			
3	consider the needs of individuals whether colleagues, passengers or members of the public when taking action			
4	keep all the relevant and appropriate people informed on action taken in line with your organisation's procedures			
5	get help from the appropriate sources in situations that are outside your own authority or ability			
6	maintain and process accurate records of emergencies or incidents in line with your organisation's procedures.			

Feedback/comments:	
Assessor's signature:	Date:
Candidate's signature:	Date:

Element achievement record

NVQ title and level: Edexcel Level 3 NVQ in Road Passenger Transport Operations				
Candidate:				
Assessor:				
Unit title: Unit 4 Ensure Health and Safety and Deal with Incidents, Accidents and Emergencies in Your Work Environment in Road Passenger Transport Operations				
Element: 4.3 Limit Risk of Injury or Harm to People and Property				
Performance criteria: You must be able to:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
1	take immediate and effective action to limit the risk without increasing the risk or threat to yourself or others			
2	be certain that the action you take is within your limits of authority and ability			
3	follow instructions or guidelines for limiting risk of injury or harm to others			
4	get immediate help if you cannot deal effectively with the risk			
5	give clear information or instructions to others to allow them to take appropriate action			
6	record and/or report details of the risk in line with the relevant guidelines			
7	report any difficulties you have keeping to your organisation's health and safety instructions or guidelines, giving full and accurate details.			
Feedback/comments:				
Assessor's signature:		Date:		
Candidate's signature:		Date:		

Knowledge evidence record

NVQ title and level: Edexcel Level 3 NVQ in Road Passenger Transport Operations										
Candidate:					Assessor:					
<p>Unit title: Unit 4 Ensure Health and Safety and Deal with Incidents, Accidents and Emergencies in Your Work Environment in Road Passenger Transport Operations</p> <p>You must show that you have the knowledge and understanding for this unit. Your performance evidence might help to show this, but it is likely that you will need additional evidence (eg answers to questions). The National Occupational Standards detail the knowledge and understanding required to carry out competent practice for the performance described in this unit.</p> <p>When using the standards it is important to read the knowledge requirements in relation to expectations and requirements of your job role.</p> <p>You need to show that you know, understand and can apply in practice:</p>										
Knowledge and understanding for this unit:				Type of evidence						
				EI	O	P	WT	S	APEL	Q&A Date
Element 4.1										
a	what is a hazard and a risk									
b	your duty to ensure health and safety of yourself and that of others									
c	the typical hazards and risks in your normal workplace including those on the road									
d	the potential financial costs and personal effects of injury									
e	how to assess risks and dangers to health and safety that are likely to happen									
f	how to decide on the level of risks, who may be at risk and the level of preventative action required									
g	the details you should record and/or report relating to risks and dangers									
h	the preventative actions that can be taken to reduce the levels of risk to an acceptable level									
i	the guidelines in relation to dealing with risks									
j	where and how to get help when necessary									

continued overleaf ...

Knowledge and understanding for this unit:	Type of evidence								
	EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
k how to prevent physical risks as a result of manual handling, movements and postures, and the importance of physical fitness									
l how to protect yourself from substances that may be harmful									
Element 4.2									
a the possible emergencies, incidents or accidents you might have to deal with or advise colleagues on how to deal with, for example, vehicle accidents or breakdowns, passenger behaviour, illness or death, stolen property, suspect or unclaimed baggage, natural disasters, fires and security alerts including terrorist threats									
b the action you can take and are authorised to take									
c how to take action to deal with emergencies, incidents or accidents									
d how to reduce, as far as possible, any possible dangers in typical travel-related emergencies, incidents or accidents									
e your organisation's procedures and guidelines for dealing with and reporting emergencies, incidents or accidents									
f the organisational and relevant legal responsibilities you have when dealing with emergencies, incidents or accidents eg COSHH Regulations									
g the things that affect customer service and goodwill in emergencies, incidents or accidents									
h how and at what point you should get help when you need it									

Knowledge and understanding for this unit:	Type of evidence								
	EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
Element 4.3									
a when it is safe and appropriate to take immediate action without putting yourself or others in danger									
b what action you can take, and are authorised to take, to limit the risk of injury or harm									
c your organisation's instructions or other guidelines relating to dealing with and reporting dangerous situations									
d how to use appropriate equipment and alarm systems to limit danger									
e the methods of effective and appropriate communication to let others know about the risks									
f where and how to get help in protecting people and property when dealing with dangerous situations.									
Feedback/comments:									
The candidate has satisfied the assessor and the internal verifier that the performance evidence and criteria, the range, and knowledge and understanding requirements have been achieved.									
Candidate's signature:							Date:		
Assessor's signature:							Date:		
Internal verifier's signature:							Date:		
COLUMN KEY:	EI = EVIDENCE INDEX NUMBER		O = OBSERVATION			P = PERSONAL STATEMENT			
	WT = WITNESS TESTIMONY		S = SIMULATION			APEL = ACCREDITATION OF PRIOR EXPERIENCE AND LEARNING			
	Q&A = QUESTIONS & ANSWERS		EWE = EXPERT WITNESS EVIDENCE			PD = PROFESSIONAL DISCUSSION			

Unit summary sheet

Unit 5: Develop Productive Working Relationships with Colleagues

What is the unit about?

This unit is about developing working relationships with colleagues, within your own organisation and within other organisations, that are productive in terms of supporting and delivering your work and that of the overall organisation.

'Colleagues' are any people you are expected to work with, whether they are at a similar position or in other positions.

Who is the unit for

The unit is recommended for team leaders and first line managers.

Definitions

Colleague – a colleague can be both within your own organisation or in a different organisation.

Skills

Listed below are the main generic skills which need to be applied in developing productive working relationships with colleagues. These skills are explicit/implicit in the detailed content of the unit and are listed here as additional information.

- communicating
- managing conflict
- empathising
- networking
- information management
- leading by example
- valuing and supporting others
- involving others
- providing feedback
- obtaining feedback
- stress management
- prioritising.

Links to other units

This unit is owned by the Management Standards Centre where it sits within the Working with People suite and appears as Unit D1.

Element achievement record

NVQ title and level: Edexcel Level 3 NVQ in Road Passenger Transport Operations				
Candidate:				
Assessor:				
Unit title: Unit 5 Develop Productive Working Relationships with Colleagues				
Performance criteria: You must be able to do the following:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
1	establish working relationships with all colleagues who are relevant to the work being carried out			
2	recognise, agree and respect the roles and responsibilities of colleagues			
3	understand and take account of the priorities, expectations, and authority of colleagues in decisions and actions			
4	fulfil agreements made with colleagues and let them know			
5	advise colleagues promptly of any difficulties or where it will be impossible to fulfil agreements			
6	identify and sort out conflicts of interest and disagreements with colleagues in ways that minimise damage to the work being carried out			
7	exchange information and resources with colleagues to make sure that all parties can work effectively			
8	provide feedback to colleagues on their performance and seek feedback from colleagues on your own performance in order to identify areas for improvement.			

continued overleaf ...

Performance criteria: You must be able to do the following:	<i>(Assessor to insert date each time competence is demonstrated)</i>			
Behaviours which underpin effective performance				
1 You present information clearly, concisely, accurately and in ways that promote understanding				
2 You seek to understand people's needs and motivations.				
3 You make time available to support others.				
4 You clearly agree what is expected of others and hold them to account.				
5 You work to develop an atmosphere of professionalism and mutual support.				
6 You model behaviour that shows respect, helpfulness and co-operation.				
7 You keep promises and honour commitments.				
8 You consider the impact of your own actions on others.				
9 You say no to unreasonable requests.				
10 You show respect for the views and actions of others.				

Feedback/comments:	
Assessor's signature:	Date:
Candidate's signature:	Date:

Knowledge evidence record

NVQ title and level: Edexcel Level 3 NVQ in Road Passenger Transport Operations									
Candidate:					Assessor:				
<p>Unit title: Unit 5 Develop Productive Working Relationships with Colleagues</p> <p>You must show that you have the knowledge and understanding for this unit. Your performance evidence might help to show this, but it is likely that you will need additional evidence (eg answers to questions). The National Occupational Standards detail the knowledge and understanding required to carry out competent practice for the performance described in this unit.</p> <p>When using the standards it is important to read the knowledge requirements in relation to expectations and requirements of your job role.</p> <p>You need to show that you know, understand and can apply in practice:</p>									
Knowledge and understanding for this unit: You must know and understand the following:	Type of evidence								
	EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
General knowledge and understanding									
a	The benefits of developing productive working relationships with colleagues.								
b	Principles of effective communication and how to apply them in order to communicate effectively with colleagues.								
c	How to identify disagreements with colleagues and the techniques for sorting them out.								
d	How to identify conflicts of interest with colleagues and the measures that can be used to manage or remove them.								
e	How to take account of diversity issues when developing working relationships with colleagues.								
f	The importance of exchanging information and resources with colleagues.								
g	How to get and make use of feedback on your performance from colleagues.								
h	How to provide colleagues with useful feedback on their performance.								

continued overleaf ...

Knowledge and understanding for this unit: You must know and understand the following:	Type of evidence								
	EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
Industry/sector specific knowledge and understanding									
a Regulations and codes of practice that apply in the industry or sector.									
b Standards of behaviour and performance in the industry or sector.									
c Working culture of the industry or sector.									
Context specific knowledge and understanding									
a Current and future work being carried out.									
b Colleagues who are relevant to the work being carried out, their work roles and responsibilities.									
c Processes within the organisation for making decisions.									
d Line management responsibilities and relationships within the organisation.									
e The organisation's values and culture.									
f Power, influence and politics within the organisation.									
g Standards of behaviour and performance expected in the organisation.									
h Information and resources that different colleagues might need.									
i Agreements with colleagues.									

Feedback/comments:

The candidate has satisfied the assessor and the internal verifier that the performance evidence and criteria, the range, and knowledge and understanding requirements have been achieved.

Candidate's signature:

Date:

Assessor's signature:

Date:

Internal verifier's signature:

Date:

COLUMN KEY:	EI = EVIDENCE INDEX NUMBER	O = OBSERVATION	P = PERSONAL STATEMENT
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	Q&A = QUESTIONS & ANSWERS	EWE = EXPERT WITNESS EVIDENCE	PD = PROFESSIONAL DISCUSSION

Unit summary sheet

Unit 6: Manage Operator Risks and Liabilities in Road Passenger Transport Operations

What is the unit about?

This unit is about identifying and understanding the critical risks and liabilities for operating in Road Passenger Transport and hence reducing business risk; this can be referred to as due diligence. The scope of this unit includes the employment of, or contracting out to, drivers. You will know the legislative requirements and any national or local codes of practice concerning the industry, for example, the Certificate of Professional Competence (CPC) for PCV drivers. You will also be able to establish and implement administrative systems for the checking, monitoring and storage of relevant information and records to ensure compliance with these legislative requirements and those of the organisation. You will also have an understanding of the levels of authority of regulatory and enforcement bodies, such as the Traffic Commissioner and Licensing Enforcement Officers.

This unit consists of one element:

- Element 6.1: Plan and Implement Due Diligence.

Element 6.1

This element is about identifying and understanding the risks and liabilities for operating in Road Passenger Transport and hence reducing business risk; this can be referred to as due diligence. The scope of this unit includes the employment of, or contracting out to, drivers. You should know the legislative requirements and any national or local codes of practice concerning the industry, such as the Certificate of Professional Competence (CPC) for PCV drivers. You should know the operator's legal duties and liabilities and be able to establish and implement administrative systems for the checking, monitoring and storage of relevant information and records to ensure compliance with legislative requirements and those of the organisation, plus have understanding of the level of authority of regulatory and enforcement bodies, such as the Traffic Commissioner and Enforcement Officers.

Who this unit is for

Managers and others responsible for operations, including the employment and contracting out to drivers, in the Taxi, Private Hire Vehicle, Community Transport, Chauffeuring, Bus and Coach Industries.

Glossary

Your organisation

This would be the company you work for or, if you are self employed, the rules you have set for yourself to ensure that you comply with relevant legal and licensing requirements.

Element achievement record

NVQ title and level: Edexcel Level 3 NVQ in Road Passenger Transport Operations				
Candidate:				
Assessor:				
Unit title: Unit 6 Manage Operator Risks and Liabilities In Road Passenger Transport Operations				
Element: 6.1 Plan and Implement Due Diligence				
Performance criteria: You must be able to:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
1	identify the legislative requirements for operators, drivers and vehicles in the industry you work in			
2	identify any relevant national or local codes of practice/by-laws which apply to the industry			
3	identify the legal duties and liabilities for the operator			
4	assess the liabilities of the organisation			
5	assess the potential risks to the organisation from employing and/or contracting out to drivers			
6	assess the potential risks of using vehicles owned by the business or the drivers			
7	assess the potential areas of risks in operating the business			
8	develop and implement administrative systems for the checking, monitoring and storing of relevant information eg vehicle service history			
9	how to handle issues where individuals fail to comply with the legislative requirements and those of the organisation.			

continued overleaf ...

Feedback/comments:

Assessor's signature:

Date:

Candidate's signature:

Date:

Knowledge evidence record

NVQ title and level: Edexcel Level 3 NVQ in Road Passenger Transport Operations									
Candidate:					Assessor:				
<p>Unit title: Unit 6 Manage operator risks and liabilities in road passenger transport operations</p> <p>You must show that you have the knowledge and understanding for this unit. Your performance evidence might help to show this, but it is likely that you will need additional evidence (eg answers to questions). The National Occupational Standards detail the knowledge and understanding required to carry out competent practice for the performance described in this unit.</p> <p>When using the standards it is important to read the knowledge requirements in relation to expectations and requirements of your job role.</p> <p>You need to show that you know, understand and can apply in practice:</p>									
Knowledge and understanding for this unit:	Type of evidence								
	EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
a the legislation and code of practice/bye laws that apply to your business, eg CPC for PCV drivers, 'O' licence for PSV/PCV									
b the evidence required to comply with legislative and other requirements, eg evidence to work in the UK, CRB checks, valid driving licence, MOT tests etc									
c how to develop and implement procedures to ensure compliance with legislative and other requirements									
d how to operate an effective administration system for the checking, monitoring and storing of relevant information									
e the importance and implementation of an effective data protection system, eg compliance with the Data Protection Act 1998									
f the role and powers of those in authority eg enforcement officers and police etc. with regard to operating a passenger carrying service									
g the consequences of non-compliance									
h the purpose and importance of due diligence.									

continued overleaf ...

Feedback/comments:

The candidate has satisfied the assessor and the internal verifier that the performance evidence and criteria, the range, and knowledge and understanding requirements have been achieved.

Candidate's signature:

Date:

Assessor's signature:

Date:

Internal verifier's signature:

Date:

COLUMN KEY:	EI = EVIDENCE INDEX NUMBER	O = OBSERVATION	P = PERSONAL STATEMENT
	WT = WITNESS TESTIMONY	S = SIMULATION	APEL = ACCREDITATION OF PRIOR EXPERIENCE AND LEARNING
	Q&A = QUESTIONS & ANSWERS	EWE = EXPERT WITNESS EVIDENCE	PD = PROFESSIONAL DISCUSSION

Unit summary sheet

Unit 7: Provide Leadership for Your Team

What is the unit about?

This unit is about providing direction to the members of your team and motivating and supporting them to achieve the objectives of the team and their personal work objectives.

Who this unit is for

The unit is recommended for team leaders.

Skills

Listed below are the main generic skills which need to be applied in providing leadership for your team. These skills are explicit/implicit in the detailed content of the unit and are listed here as additional information.

- communicating
- planning
- team building
- leading by example
- providing feedback
- setting objectives
- motivating
- consulting
- problem solving
- valuing and supporting others
- monitoring
- managing conflict
- decision making
- following.

Links to other units

This unit is owned by the Management Standards Centre where it sits within the Providing Direction suite and appears as Unit B5.

Element achievement record

NVQ title and level: Edexcel Level 3 NVQ in Road Passenger Transport Operations				
Candidate:				
Assessor:				
Unit title: Unit 7 Provide Leadership for Your Team				
Performance criteria: You must be able to do the following:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
1	set out and positively communicate the purpose and objectives of the team to all members			
2	involve members in planning how the team will achieve its objectives			
3	ensure that each member of the team has personal work objectives and understands how achieving these will contribute to achievement of the team's objectives			
4	encourage and support team members to achieve their personal work objectives and those of the team and provide recognition when objectives have been achieved			
5	win, through your performance, the trust and support of the team for your leadership			
6	steer the team successfully through difficulties and challenges, including conflict within the team			
7	encourage and recognise creativity and innovation within the team			
8	give team members support and advice when they need it especially during periods of setbacks and change			
9	motivate team members to present their own ideas and listen to what they say			
10	encourage team members to take the lead when they have the knowledge and expertise and show willingness to follow this lead			
11	monitor activities and progress across the team without interfering.			

continued overleaf ...

Performance criteria: You must be able to do the following:	<i>(Assessor to insert date each time competence is demonstrated)</i>			
Behaviours which underpin effective performance				
1 You create a sense of common purpose.				
2 You take personal responsibility for making things happen.				
3 You encourage and support others to take decisions autonomously.				
4 You act within the limits of your authority.				
5 You make time available to support others.				
6 You show integrity, fairness and consistency in decision-making.				
7 You seek to understand people's needs and motivations.				
8 You model behaviour that shows respect, helpfulness and co-operation.				

Feedback/comments:	
Assessor's signature:	Date:
Candidate's signature:	Date:

Knowledge evidence record

NVQ title and level: Edexcel Level 3 NVQ in Road Passenger Transport Operations									
Candidate:					Assessor:				
<p>Unit title: Unit 7 Provide Leadership for Your Team</p> <p>You must show that you have the knowledge and understanding for this unit. Your performance evidence might help to show this, but it is likely that you will need additional evidence (eg answers to questions). The National Occupational Standards detail the knowledge and understanding required to carry out competent practice for the performance described in this unit.</p> <p>When using the standards it is important to read the knowledge requirements in relation to expectations and requirements of your job role.</p> <p>You need to show that you know, understand and can apply in practice:</p>									
Knowledge and understanding for this unit: You must know and understand the following:	Type of evidence								
	EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
General knowledge and understanding									
a Different ways of communicating effectively with members of a team.									
b How to set objectives which are SMART (Specific, Measurable, Achievable, Realistic and Time-bound).									
c How to plan the achievement of team objectives and the importance of involving team members in this process.									
d The importance of and being able to show team members how personal work objectives contribute to achievement of team objectives.									
e That different styles of leadership exist.									
f How to select and successfully apply a limited range of different methods for motivating, supporting and encouraging team members and recognising their achievements.									
g Types of difficulties and challenges that may arise, including conflict within the team, and ways of identifying and overcoming them.									
h The importance of encouraging others to take the lead and ways in which this can be achieved.									

continued overleaf ...

Knowledge and understanding for this unit: You must know and understand the following:	Type of evidence								
	EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
i The benefits of and how to encourage and recognise creativity and innovation within a team.									
Industry/sector specific knowledge and understanding									
a Legal, regulatory and ethical requirements in the industry/sector.									
Context specific knowledge and understanding									
a The members, purpose, objectives and plans of your team.									
b The personal work objectives of members of your team.									
c The types of support and advice that team members are likely to need and how to respond to these.									
d Standards of performance for the work of your team eg standard of cleanliness of vehicles.									
Feedback/comments:									
The candidate has satisfied the assessor and the internal verifier that the performance evidence and criteria, the range, and knowledge and understanding requirements have been achieved.									
Candidate's signature:							Date:		
Assessor's signature:							Date:		
Internal verifier's signature:							Date:		
COLUMN KEY:	EI = EVIDENCE INDEX NUMBER			O = OBSERVATION			P = PERSONAL STATEMENT		
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	Q&A = QUESTIONS & ANSWERS			EWE = EXPERT WITNESS EVIDENCE			PD = PROFESSIONAL DISCUSSION		

Option units

Unit 3: Provide Professional Customer Service in Road Passenger Transport Operations

What is the unit about?

This unit is about providing professional customer service. You should be able to maintain a professional image to your customers, give customers information and provide customer service. You should know and understand your organisation's procedures relating to customer service and the way in which your own behaviour impacts on you and your organisation. Communicating with customers is an important feature of this unit.

This unit consists of three elements:

- Element 3.1: Follow Dress and Behaviour Codes
- Element 3.2: Develop Professional Relationships with Customers
- Element 3.3: Communicate Effectively with Customers.

Element 3.1

This element is about how you show that you know and follow the relevant codes of dress, appearance and behaviour. While following codes of dress and behaviour, you should present a professional image to your customers in the way you relate to them, including during conversations. Your customers include people from inside your organisation as well as from outside it. You should also make sure you carry out your work in a way that does not cause unnecessary inconvenience to your customers, and show that you can deal effectively with difficulties that may arise.

Element 3.2

This element is about how you show that you can keep to your organisation's policies and procedures on customer service. This covers, for example, acknowledging and communicating with customers, some of whom could be 'difficult', in a friendly and helpful way. You should be able to refer customers to the appropriate person if you cannot help them, or if it is outside your responsibility. It also includes exchanging verbal or written information related to customer service. You should also be able to identify and report possible difficulties in developing customer service, such as those relating to services, products or personalities.

Element 3.3

This element is about how to use effective communication to give your customers information they need. This communication will be verbal and non-verbal. The way in which you respond to customers' requests for information should be positive, helpful and appropriate to their needs. After giving your customers information, you should be able to confirm it was enough to meet their needs and that they understood you. Any information you do give should be within your own limits of knowledge and authority. You will also need to know and follow your organisation's codes of behaviour and customer service. If you have difficulties communicating with your customers, some of whom may be difficult, you should be able to get help or advice from the appropriate person.

Who this unit is for

This unit is for those working in road passenger transport operations.

Glossary*Your organisation*

This would be the company you work for or, if you are self employed, the rules you have set for yourself to ensure that you comply with relevant legal and licensing requirements.

Customer

Includes passengers.

Links to other units

This unit is based on Unit 3 from the GoSkills Road Passenger Vehicle Driving suite.

Element achievement record

NVQ title and level: Edexcel Level 3 NVQ in Road Passenger Transport Operations				
Candidate:				
Assessor:				
Unit title: Unit 3 Provide Professional Customer Service in Road Passenger Transport Operations				
Element: 3.1 Follow Dress and Behaviour Codes				
Performance criteria: You must be able to:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
1	behave towards customers in a polite and helpful way			
2	consistently follow the relevant code of dress and personal appearance			
3	put a professional image across to your customers by behaving appropriately at all times			
4	hold conversations with customers in a polite and helpful way taking account of differing situations			
5	carry out your work in a way that reduces inconvenience to your customers as far as possible.			
Feedback/comments:				
Assessor's signature:			Date:	
Candidate's signature:			Date:	

Element achievement record

NVQ title and level: Edexcel Level 3 NVQ in Road Passenger Transport Operations				
Candidate:				
Assessor:				
Unit title: Unit 3 Provide Professional Customer Service in Road Passenger Transport Operations				
Element: 3.2 Develop Professional Relationships with Customers				
Performance criteria: You must be able to:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
1	acknowledge customers promptly and politely, and speak to them in a way that shows you are being friendly and helpful and gives them confidence in your organisation			
2	give customers information that is within your own limits of authority			
3	carry out approved procedures and policies for promoting customer service including customers with special needs			
4	refer customers to other appropriate people if you do not have the knowledge to help them or if it goes beyond your responsibilities			
5	accurately and fully record information from customers that relates to your organisation respecting as appropriate confidential information			
6	identify and report, to the appropriate person, possible difficulties that could affect customers			
7	identify other main providers of passenger transport related to your organisation's activity.			

continued overleaf ...

Feedback/comments:

Assessor's signature:

Date:

Candidate's signature:

Date:

Element achievement record

NVQ title and level: Edexcel Level 3 NVQ in Road Passenger Transport Operations				
Candidate:				
Assessor:				
Unit title: Unit 3 Provide Professional Customer Service in Road Passenger Transport Operations				
Element: 3.3 Communicate Effectively with Customers				
Performance criteria: You must be able to:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
1	behave towards your customers in line with your organisation's code of customer service			
2	communicate with your customers in a way that is appropriate to their needs and respecting confidentiality			
3	agree as appropriate a route or plan with customers			
4	respond to your customers' requests for information in a positive and helpful way within the limits of your knowledge and authority which will give them a positive image of your organisation			
5	confirm with your customers that the information you have given is helpful and understood			
6	maintain standards of behaviour in line with providing a service			
7	deal effectively with communication problems in line with your organisation's guidelines, which could include getting help or advice.			

continued overleaf ...

Feedback/comments:

Assessor's signature:

Date:

Candidate's signature:

Date:

Knowledge evidence record

NVQ title and level: Edexcel Level 3 NVQ in Road Passenger Transport Operations									
Candidate:					Assessor:				
Unit title: Unit 3 Provide Professional Customer Service in Road Passenger Transport Operations									
<p>You must show that you have the knowledge and understanding for this unit. Your performance evidence might help to show this, but it is likely that you will need additional evidence (eg answers to questions). The National Occupational Standards detail the knowledge and understanding required to carry out competent practice for the performance described in this unit.</p> <p>When using the standards it is important to read the knowledge requirements in relation to expectations and requirements of your job role.</p> <p>You need to show that you know, understand and can apply in practice:</p>									
Knowledge and understanding for this unit:	Type of evidence								
	EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
Element 3.1									
a	the importance for the organisation of the standards of service provided								
b	why it is important to have and follow codes of appearance and behaviour								
c	the relevant codes of dress, appearance and behaviour								
d	how to deal with difficulties in meeting codes of dress and behaviour								
e	how to recognise opportunities to improve the service you give to customers.								
Element 3.2									
a	your organisation's policy and procedures for promoting customer service								
b	the limits of your own authority, knowledge and responsibility in matters relating to customer service								
c	what customer service information will benefit, or is needed by, your organisation								
d	the sorts of difficulties or problems that can arise in promoting customer service								

continued overleaf ...

Knowledge and understanding for this unit:	Type of evidence								
	EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
e the procedures for referring or reporting customer service issues to other appropriate people in your organisation and rules governing confidentiality									
f how to identify and provide for customers with special needs									
g the importance of making sure you treat everyone equally when providing the service									
h the make up of the passenger transport industry at national and local level.									
Element 3.3									
a the forms of verbal and non-verbal communication									
b your organisation's procedures for keeping customers informed									
c how to confirm customers understand the information you have given them and how to interpret (verbal and non-verbal) signals from them									
d where to get help from to deal with communication difficulties									
e your organisation's standards and codes for behaviour and customer service including rules on customer confidentiality									
f standards of behaviour expected from you.									

Feedback/comments:

The candidate has satisfied the assessor and the internal verifier that the performance evidence and criteria, the range, and knowledge and understanding requirements have been achieved.

Candidate's signature:

Date:

Assessor's signature:

Date:

Internal verifier's signature:

Date:

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Unit summary sheet

Unit 9: Develop and Maintain Your Work Skills and Knowledge in Road Passenger Transport Operations

What is the unit about?

This unit is about how you assess what levels of competency you need in your role and decide whether you need further training or development to meet or maintain those standards.

This unit consists of one element:

- Element 9.1: Develop and maintain your work skills and knowledge.

Element 9.1

This element is about how you assess what standards of competency you need in your role and decide whether you need further training or development to meet or maintain those standards, for example knowledge of the PCV Driver CPC if this is applicable to your organisation and job role. You may also have to consider a role you could have in the near future. In identifying your development needs, you will have to balance your needs with those of your organisation.

Who this unit is for

This unit is for all those people working in Road Passenger Transport Operations.

Glossary

Your organisation

This would be the company you work for or, if you are self employed, the rules you have set for yourself to ensure that you comply with relevant legal and licensing requirements.

Links to other units

This unit is based on Unit 14 from the GoSkills Road Passenger Vehicle Driving suite.

Element achievement record

NVQ title and level: Edexcel Level 3 NVQ in Road Passenger Transport Operations				
Candidate:				
Assessor:				
Unit title: Unit 9 Develop and Maintain Your Work Skills and Knowledge in Road Passenger Transport Operations				
Element: 9.1 Develop and Maintain Your Work Skills and Knowledge				
Performance criteria: You must be able to:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
1	identify and describe your needs to develop the skills required in your role			
2	balance your needs and the needs of your organisation			
3	discuss and agree where relevant with the appropriate person in your organisation how you will receive the development you need and get feedback			
4	carry out activities to develop your skills			
5	take action if your progress is below the necessary standard			
6	identify the main providers of passenger transport related to your role.			
Feedback/comments:				
Assessor's signature:		Date:		
Candidate's signature:		Date:		

Knowledge evidence record

NVQ title and level: Edexcel Level 3 NVQ in Road Passenger Transport Operations									
Candidate:					Assessor:				
<p>Unit title: Unit 9 Develop and Maintain Your Work Skills and Knowledge in Road Passenger Transport Operations</p> <p>You must show that you have the knowledge and understanding for this unit. Your performance evidence might help to show this, but it is likely that you will need additional evidence (eg answers to questions). The National Occupational Standards detail the knowledge and understanding required to carry out competent practice for the performance described in this unit.</p> <p>When using the standards it is important to read the knowledge requirements in relation to expectations and requirements of your job role.</p> <p>You need to show that you know, understand and can apply in practice:</p>									
Knowledge and understanding for this unit:	Type of evidence								
	EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
a the standards of skills and knowledge needed in your role									
b how to measure your current skills and identify areas needing development									
c any process within your organisation for discussing and agreeing your development plans and getting feedback									
d how to monitor your progress against your development plans									
e the passenger transport industry at local and national level, relevant to your role.									

continued overleaf ...

Feedback/comments:

The candidate has satisfied the assessor and the internal verifier that the performance evidence and criteria, the range, and knowledge and understanding requirements have been achieved.

Candidate's signature:

Date:

Assessor's signature:

Date:

Internal verifier's signature:

Date:

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Unit summary sheet

Unit 10: Manage Conflict in Road Passenger Transport Operations

What is the unit about?

This unit is about dealing with situations where there is conflict between people. You should be able to recognise when a person's behaviour is inappropriate and deal with this in line with relevant legal procedures and organisational guidelines. You should be able to maintain your own personal safety, giving advice and warnings, and calling for assistance when required. Communication is a key feature of this unit and you should be able to communicate with people effectively both verbally and non-verbally to defuse a situation.

This unit consists of two elements:

- Element 10.1: Assess situations and decide on action needed
- Element 10.2: Take action to deal with conflict.

Element 10.1

This element is about how you recognise and assess situations that involve inappropriate behaviour that could lead to potential or actual conflict situations. This behaviour could include:

- verbal or physical abuse
- actions that could cause a danger to others
- actions that could cause damage to property
- not keeping to conditions of service
- illegal or offensive acts.

You should be able to prioritise the action you plan to take in line with approved organisational, relevant legal or local procedures or guidelines. This action must always be within your ability and authority. In situations outside your ability or authority, you should know where and how to get help or advice. While deciding what action to take, you should maintain the goodwill of those not directly involved and take account of their needs when dealing with the situation.

Element 10.2

This element is about how you deal effectively with potential or actual conflict situations. Your action should be in line with approved organisational, relevant legal or local procedures or guidelines, and be within your ability and authority. You should try to control the situation, either personally or by contacting someone else, without making the situation worse. As a result, you should know from where and how to get help, including from colleagues, the emergency services or authorities, and other operators. This is particularly important in situations outside your ability or authority to deal with. You should maintain your safety and that of others while dealing with the conflict. You will also need to balance the needs of others not directly involved. You should be able to report details of any conflict situations and details of any action you have taken.

Who this unit is for

This unit is for those working in Road Passenger Transport Operations.

Glossary*People*

Colleagues, passengers and members of the general public.

Your organisation

This would be the company you work for or, if you are self employed, the rules you have set for yourself to ensure that you comply with relevant legal and licensing requirements.

Links to other units

This Unit is based on Unit 4 from the GoSkills Road Passenger Vehicle Driving suite and also Unit 7 from the GoSkills Passenger Carrying Vehicle Driving suite.

Element achievement record

NVO title and level: Edexcel Level 3 NVQ in Road Passenger Transport Operations				
Candidate:				
Assessor:				
Unit title: Unit 10 Manage Conflict in Road Passenger Transport Operations				
Element: 10.1 Assess Situations and Decide on Action Needed				
Performance criteria: You must be able to:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
1	promptly recognise situations that involve inappropriate behaviour by people			
2	assess the risks to yourself and others in the situation			
3	assess the seriousness of the situation and the behaviour of the people involved			
4	prioritise the action to be taken, in line with approved organisational guidelines			
5	make sure the action you plan to take, wherever possible, meets approved organisational guidelines or procedures			
6	consider the needs of others when dealing with the situation as far as possible and in line with approved organisational guidelines			
7	get help from the appropriate sources in situations outside your own authority or ability to deal with			
8	collect and report necessary information about the people involved and the situation			
9	assist other staff as appropriate to deal with conflict situations.			

continued overleaf ...

Feedback/comments:

Assessor's signature:

Date:

Candidate's signature:

Date:

Element achievement record

NVQ title and level: Edexcel Level 3 NVQ in Road Passenger Transport Operations				
Candidate:				
Assessor:				
Unit title: Unit 10 Manage Conflict in Road Passenger Transport Operations				
Element: 10.2 Take Action to Deal with Conflict				
Performance criteria: You must be able to:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
1	take action to deal with conflict situations in line with your organisation's procedures and guidelines			
2	take action in a way that does not make the situation worse			
3	take control of the situation in a way that reduces, as far as possible, any possible conflict			
4	get help from the appropriate sources in situations that are outside your own authority or ability			
5	consider the needs of others, as far as possible, when taking action			
6	maintain your safety and security, and that of others in the workplace, while taking action			
7	report the details of any conflict situation in line with your organisation's procedures.			

Feedback/comments:	
Assessor's signature:	Date:
Candidate's signature:	Date:

Knowledge evidence record

NVQ title and level: Edexcel Level 3 NVQ in Road Passenger Transport Operations									
Candidate:					Assessor:				
Unit title: Unit 10 Manage Conflict in Road Passenger Transport Operations									
You must show that you have the knowledge and understanding for this unit. Your performance evidence might help to show this, but it is likely that you will need additional evidence (eg answers to questions). The National Occupational Standards detail the knowledge and understanding required to carry out competent practice for the performance described in this unit.									
When using the standards it is important to read the knowledge requirements in relation to expectations and requirements of your job role.									
You need to show that you know, understand and can apply in practice:									
Knowledge and understanding for this unit:	Type of evidence								
	EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
Element 10.1									
a the types of conflict situations that are likely to arise									
b how to carry out risk assessments in conflict situations and the factors you should bear in mind									
c the actions you can take and are authorised to take									
d when and how to get help when needed									
e why you should collect and report information about the people involved and the situation and your organisation's procedures regarding this									
f how to maintain goodwill in conflict situations.									
Element 10.2									
a the action you can take and are authorised to take with regard to resolving conflict between people									
b the organisational and relevant legal responsibilities you have when sorting out conflict situations									
c how to carry out positive responsive action to deal with conflict situations									

continued overleaf ...

Knowledge and understanding for this unit:	Type of evidence								
	EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
d how and at what point you should get help when necessary									
e how to maintain your own safety and security, and that of others and your organisation's property									
f your organisation's procedures and guidelines for dealing with and reporting conflict situations.									

Feedback/comments:

The candidate has satisfied the assessor and the internal verifier that the performance evidence and criteria, the range, and knowledge and understanding requirements have been achieved.

Candidate's signature:

Date:

Assessor's signature:

Date:

Internal verifier's signature:

Date:

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Unit summary sheet

Unit 12: Support Learners by Mentoring in the Workplace

What is the unit about?

This unit is for staff skilled in their particular discipline and who wish to develop and assist new and existing staff. It is about making sure the nature of mentoring in the workplace is properly understood and that an appropriate environment is created in which this function can take place. It covers the skills and competences required to give learners information, advice and guidance on their work roles and expectations together with giving them encouragement and support to stay motivated. In particular it covers planning the mentoring process, setting up and maintaining the mentoring relationship, and giving mentoring support. Applying relevant safe working practices will be a key issue throughout.

This unit consists of one element:

- Element 12.1: Plan, Provide and Maintain the Mentoring Process.

Element 12.1

This element is about planning and providing mentoring.

You should be able to provide mentoring activity to a range of individuals to include as appropriate:

- new starters
- individuals unfamiliar with a particular technical matter
- individuals with a need to increase workplace skills
- individuals experiencing difficulty in specific aspects of their work
- trainees and others on development programmes.

You should be able to communicate in the following ways:

- face-to-face verbal communication
- written communication.

Who this unit is for

The unit is specifically for those responsible for mentoring.

Glossary

Mentoring

To support and encourage people to reflect on their performance and manage their own learning in order that they may maximise their potential, develop their skills and improve their performance.

Links to other units

This unit is based on Unit 36 from the GoSkills Transport Engineering and Maintenance suite.

Element achievement record

NVQ title and level: Edexcel Level 3 NVQ in Road Passenger Transport Operations				
Candidate:				
Assessor:				
Unit title: Unit 12 Support Learners by Mentoring in the Workplace				
Element: 12.1 Plan, Provide and Maintain the Mentoring Process				
Performance criteria: You must be able to:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
1	list the personal attributes of effective mentors			
2	list the benefits that can derive from a mentoring programme			
3	understand the role of a mentor			
4	identify learners' needs and the resources and facilities required to undertake the mentoring role to help learners meet identified needs			
5	identify sources of information and support to help perform the role of mentor			
6	agree how progress and any problems will be reviewed during the mentoring process			
7	plan and maintain the mentoring process within the limits of your responsibility.			

Feedback/comments:	
Assessor's signature:	Date:
Candidate's signature:	Date:

Knowledge evidence record

NVQ title and level: Edexcel Level 3 NVQ in Road Passenger Transport Operations									
Candidate:					Assessor:				
<p>Unit title: Unit 12 Support Learners by Mentoring in the Workplace</p> <p>You must show that you have the knowledge and understanding for this unit. Your performance evidence might help to show this, but it is likely that you will need additional evidence (eg answers to questions). The National Occupational Standards detail the knowledge and understanding required to carry out competent practice for the performance described in this unit.</p> <p>When using the standards it is important to read the knowledge requirements in relation to expectations and requirements of your job role.</p> <p>You need to show that you know, understand and can apply in practice:</p>									
Knowledge and understanding for this unit:	Type of evidence								
	EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
a the relevant health and safety legislation, regulations and safe working procedures relevant to the workplace									
b the mentoring procedures to include rules on confidentiality and their role in the training policy									
c the mentoring process, in particular how to: <ul style="list-style-type: none"> • identify the benefits of a mentoring programme • provide opportunities in the workplace for learners to reflect on their performance, develop skills and increase confidence • plan and monitor mentoring activity 									
d the personal attributes of effective mentors									
e the problems experienced by all new entrants including where relevant, those from overseas needing, for example, language skills, as well as experienced staff requiring further development in workplace skills									
f the extent of your own responsibility and to whom you should report if you have problems that you cannot solve.									

continued overleaf ...

Feedback/comments:

The candidate has satisfied the assessor and the internal verifier that the performance evidence and criteria, the range, and knowledge and understanding requirements have been achieved.

Candidate's signature:

Date:

Assessor's signature:

Date:

Internal verifier's signature:

Date:

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Unit summary sheet

Unit 13: Resolve Customer Service Problems

What is the unit about?

This unit is all about what to do when it is difficult to meet customer expectations. Even if the service you give is excellent, some customers will experience problems. Part of your job is to help to resolve those problems. A problem is anything that means customer expectations are not being met. This may be because your customer's expectations involve more than you can offer or because your service procedures have not been followed.

Some problems are reported by customers and sometimes you spot the problem first and resolve it before your customer has even noticed.

As soon as you are aware of a problem, you need to consider the options and then choose a way to put it right.

This unit is particularly important in customer service because many customers judge how good the customer service of your organisation is by the way problems are handled.

This unit consists of three elements:

- Element 13.1: Spot Customer Service Problems
- Element 13.2: Pick the Best Solution to Resolve Customer Service Problems
- Element 13.3: Take Action to Resolve Customer Service Problems.

The key words and phrases for this unit are:

- listening
- recognise repeated problems.

Who this unit is for

This unit is for all those whose work brings them into contact with customers.

Links to other units

This unit is owned by the Institute of Customer Service where it sits within the Customer Service Theme of Handling Problems where it appears as unit 31. This Theme covers the behaviours, processes and approaches that are most effective when handling customer service problems.

Element achievement record

NVQ title and level: Edexcel Level 3 NVQ in Road Passenger Transport Operations				
Candidate:				
Assessor:				
Unit title: Unit 13 Resolve Customer Service Problems				
Element: 13.1 Spot Customer Service Problems				
Performance criteria: When you resolve customer service problems you must consistently:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
1	listen carefully to your customers about problems they have raised			
2	ask your customers about the problem to check your understanding			
3	recognise repeated problems and alert the appropriate authority			
4	share customer feedback with others to identify potential problems before they happen			
5	identify problems with systems and procedures before they begin to affect your customers.			

Feedback/comments:	
Assessor's signature:	Date:
Candidate's signature:	Date:

Element achievement record

NVQ title and level: Edexcel Level 3 NVQ in Road Passenger Transport Operations				
Candidate:				
Assessor:				
Unit title: Unit 13 Resolve Customer Service Problems				
Element: 13.2 Pick the Best Solution to Resolve Customer Service Problems				
Performance criteria: When you resolve customer service problems you must consistently:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
1	identify the options for resolving a customer service problem			
2	work with others to identify and confirm the options to resolve a customer service problem			
3	work out the advantages and disadvantages of each option for your customer and your organisation			
4	pick the best option for your customer and your organisation			
5	identify for your customer other ways that problems may be resolved if you are unable to help.			
Feedback/comments:				
Assessor's signature:		Date:		
Candidate's signature:		Date:		

Element achievement record

NVQ title and level: Edexcel Level 3 NVQ in Road Passenger Transport Operations				
Candidate:				
Assessor:				
Unit title: Unit 13 Resolve Customer Service Problems				
Element: 13.3 Take Action to Resolve Customer Service Problems				
Performance criteria: When you resolve customer service problems you must consistently:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
1	discuss and agree the options for solving the problem with your customer			
2	take action to implement the option agreed with your customer			
3	work with others and your customer to make sure that any promises related to solving the problem are kept			
4	keep your customer fully informed about what is happening to resolve problem			
5	check with your customer to make sure the problem has been resolved to their satisfaction			
6	give clear reasons to your customer when the problem has not been resolved to their satisfaction.			
Feedback/comments:				
Assessor's signature:			Date:	
Candidate's signature:			Date:	

Knowledge evidence record

NVQ title and level: Edexcel Level 3 NVQ in Road Passenger Transport Operations													
Candidate:					Assessor:								
<p>Unit title: Unit 13 Resolve Customer Service Problems</p> <p>You must show that you have the knowledge and understanding for this unit. Your performance evidence might help to show this, but it is likely that you will need additional evidence (eg answers to questions). The National Occupational Standards detail the knowledge and understanding required to carry out competent practice for the performance described in this unit.</p> <p>When using the standards it is important to read the knowledge requirements in relation to expectations and requirements of your job role.</p> <p>You need to show that you know, understand and can apply in practice:</p>													
<p>Knowledge and understanding for this unit</p> <p>To be competent in resolving customer service problems you must know and understand:</p>				Type of evidence									
				EI	O	P	WT	S	APEL	Q&A Date	EWE	PD	
a organisational procedures and systems for dealing with customer service problems													
b how to defuse potentially stressful situations													
c how to negotiate													
d the limitations of what you can offer your customer.													
<p>Feedback/comments:</p> 													
<p>The candidate has satisfied the assessor and the internal verifier that the performance evidence and criteria, the range, and knowledge and understanding requirements have been achieved.</p>													
Candidate's signature:							Date:						
Assessor's signature:							Date:						
Internal verifier's signature:							Date:						
COLUMN KEY:	EI = EVIDENCE INDEX NUMBER			O = OBSERVATION			P = PERSONAL STATEMENT						
	WT = WITNESS TESTIMONY			S = SIMULATION			APEL = ACCREDITATION OF PRIOR EXPERIENCE AND LEARNING						
	Q&A = QUESTIONS & ANSWERS			EWE = EXPERT WITNESS EVIDENCE			PD = PROFESSIONAL DISCUSSION						

Unit summary sheet

Unit 14: Process Customer Service Complaints

What is the unit about?

In any customer service situation a customer who is not satisfied may resort to making a complaint. Complaints may be justified or unjustified but in either case your customer expects you to respond and to offer some resolution or compensation. Complaints require investigation and the different options for their resolution to be considered.

This unit is all about the process of handling complaints.

This unit consists of two elements:

- Element 14.1: Recognise the Signs that a Query or Problem is About to Produce a Complaint
- Element 14.2: Deal with a Complaint Effectively.

The key words and phrases for this unit are:

- recognise a complaint
- dissatisfied customers
- choose between options
- assess risks
- report findings
- escalate complaints
- give feedback
- keep records.

Who this unit is for

This unit is for all those whose work brings them into contact with customers.

Links to other units

This unit is owned by the Institute of Customer Service where it sits within the Customer Service Theme of Handling Problems where it appears as Unit 34. This Theme covers the behaviours, processes and approaches that are most effective when handling customer service problems.

Element achievement record

NVQ title and level: Edexcel Level 3 NVQ in Road Passenger Transport Operations				
Candidate:				
Assessor:				
Unit title: Unit 14 Process Customer Service Complaints				
Element: 14.1 Recognise the Signs that a Query or Problem is About to Produce a Complaint				
Performance criteria: When you process customer service complaints you must consistently:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
1	identify signs that a customer is becoming dissatisfied with the customer service of your organisation			
2	take action to change the situation so that the query or problem does not result in a complaint			
3	take actions to change your customer service approach in order to avoid future complaints when a justified complaint has been made.			
Feedback/comments:				
Assessor's signature:			Date:	
Candidate's signature:			Date:	

Element achievement record

NVQ title and level: Edexcel Level 3 NVQ in Road Passenger Transport Operations				
Candidate:				
Assessor:				
Unit title: Unit 14 Process Customer Service Complaints				
Element: 14.2 Deal with a Complaint Effectively				
Performance criteria: When you process customer service complaints you must consistently:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
1	ensure that you have a clear understanding of the nature and details of the complaint			
2	investigate the facts of the complaint in order to establish whether it should be dealt with as a justified complaint or an unjustified complaint			
3	identify all the possible options for a solution and consider the benefits and drawbacks of each option for your customer and for your organisation			
4	assess the risks to your organisation of choosing each option			
5	report the findings of your investigation to your customer and offer your chosen solution			
6	escalate the complaint by involving more senior members of your organisation or an independent third party if there is sufficient reason to do so			
7	give feedback to other colleagues involved which will help them avoid future complaints			
8	keep clear records of the way the complaint has been handled to avoid later misunderstandings.			

continued overleaf ...

Feedback/comments:

Assessor's signature:

Date:

Candidate's signature:

Date:

Knowledge evidence record

NVQ title and level: Edexcel Level 3 NVQ in Road Passenger Transport Operations									
Candidate:					Assessor:				
<p>Unit title: Unit 14 Process Customer Service Complaints</p> <p>You must show that you have the knowledge and understanding for this unit. Your performance evidence might help to show this, but it is likely that you will need additional evidence (eg answers to questions). The National Occupational Standards detail the knowledge and understanding required to carry out competent practice for the performance described in this unit.</p> <p>When using the standards it is important to read the knowledge requirements in relation to expectations and requirements of your job role.</p> <p>You need to show that you know, understand and can apply in practice:</p>									
Knowledge and understanding for this unit To be competent in processing customer service complaints you need to know and understand:	Type of evidence								
	EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
a how to monitor the level of complaints and identify those that should provoke a special review of the service offer and service delivery									
b why dealing with complaints is an inevitable part of delivering customer service									
c organisational procedures for dealing with complaints									
d how to negotiate a solution with your customer that is acceptable to that customer and to the organisation									
e the regulatory definition of a complaint in your sector and the regulatory requirements of how complaints should be handled and reported									
f when to escalate a complaint by involving more senior members of the organisation or an independent third party									
g the implications of admitting liability for an error made by your organisation									
h how to spot and interpret signals that you customer may be considering making a complaint									

continued overleaf ...

Knowledge and understanding for this unit To be competent in processing customer service complaints you need to know and understand:	Type of evidence								
	EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
i techniques for handling conflict									
j the importance of dealing with a complaint promptly									
k why the offer of compensation or replacement service or products may not always be the best options for resolving a complaint									
l how the successful handling of a complaint presents an opportunity to impress a customer who has been dissatisfied.									
Feedback/comments:									
The candidate has satisfied the assessor and the internal verifier that the performance evidence and criteria, the range, and knowledge and understanding requirements have been achieved.									
Candidate's signature:							Date:		
Assessor's signature:							Date:		
Internal verifier's signature:							Date:		

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	Q&A = QUESTIONS & ANSWERS	EWE = EXPERT WITNESS EVIDENCE	PD = PROFESSIONAL DISCUSSION

Unit summary sheet

Unit 18: Support Customer Service Improvements

What is the unit about?

Organisations change the way they deliver service to their customers because customer expectations rise and because other organisations improve the services they offer. Often the most important ideas about how to improve customer service come from people dealing directly with customers.

Your job involves delivering customer service. If your organisation has decided to make changes, it is your job to support them and to present them positively to your customers. Also, by listening to customer comments you may have your own ideas about how the service you deliver could be improved.

This unit is all about how you provide support for changes that your organisation has introduced. In addition, it covers how you present your own ideas for improvements to someone in your organisation that can authorise trying out the change.

This unit consists of three elements:

- Element 18.1: Use Feedback to Identify Potential Customer Service Improvements
- Element 18.2: Implement Changes in Customer Service
- Element 18.3: Assist with the Evaluation of Changes in Customer Service.

The key words and phrases for this unit are:

- communicate changes positively
- customer service improvements
- customer feedback
- collect information
- use feedback
- present possibilities for change
- improve service
- share ideas
- implement changes.

Who this unit is for

This unit is for all those whose work brings them into contact with customers.

Links to other units

This unit is owned by the Institute of Customer Service where it sits within the Customer Service Theme of Development and Improvement suite where it appears as Unit 37. This Theme covers activities and approaches that play a vital part in customer service by seeking and implementing improvements and developments.

Element achievement record

NVQ title and level: Edexcel Level 3 NVQ in Road Passenger Transport Operations				
Candidate:				
Assessor:				
Unit title: Unit 18 Support Customer Service Improvements				
Element: 18.1 Use Feedback to Identify Potential Customer Service Improvements				
Performance criteria: To support customer service improvements you must consistently:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
1	gather informal feedback from your customers			
2	use customer feedback procedures to collect information from your customers			
3	use the information from our customers to develop a better understanding of their customer service experience			
4	identify ways the service you give could be improved based on information you have gathered			
5	share your ideas for improving customer service with colleagues.			
Feedback/comments:				
Assessor's signature:		Date:		
Candidate's signature:		Date:		

Element achievement record

NVQ title and level: Edexcel Level 3 NVQ in Road Passenger Transport Operations				
Candidate:				
Assessor:				
Unit title: Unit 18 Support Customer Service Improvements				
Element: 18.2 Implement Changes in Customer Service				
Performance criteria: To support customer service improvements you must consistently:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
1	identify a possible change that could be made to improve customer service			
2	present your idea for improving customer service to a colleague with the appropriate authority to approve the change			
3	carry out changes to customer service procedures based on your own idea or proposed by your organisation			
4	keep your customers informed of changes to customer service			
5	give customers a positive impression of changes that have been made			
6	work positively with others to support customer service changes.			

Feedback/comments:	
Assessor's signature:	Date:
Candidate's signature:	Date:

Element achievement record

NVQ title and level: Edexcel Level 3 NVQ in Road Passenger Transport Operations				
Candidate:				
Assessor:				
Unit title: Unit 18 Support Customer Service Improvements				
Element: 18.3 Assist with the Evaluation of Changes in Customer Service				
Performance criteria: To support customer service improvements you must consistently:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
1	discuss with others how changes to customer service are working			
2	work with others to identify any negative effects of changes and how these can be avoided.			
Feedback/comments:				
Assessor's signature:			Date:	
Candidate's signature:			Date:	

Knowledge evidence record

NVQ title and level: Edexcel Level 3 NVQ in Road Passenger Transport Operations														
Candidate:					Assessor:									
<p>Unit title: Unit 18 Support Customer Service Improvements</p> <p>You must show that you have the knowledge and understanding for this unit. Your performance evidence might help to show this, but it is likely that you will need additional evidence (eg answers to questions). The National Occupational Standards detail the knowledge and understanding required to carry out competent practice for the performance described in this unit.</p> <p>When using the standards it is important to read the knowledge requirements in relation to expectations and requirements of your job role.</p> <p>You need to show that you know, understand and can apply in practice:</p>														
<p>Knowledge and understanding for this unit:</p> <p>To be competent at supporting customer service improvements you must know and understand:</p>					Type of evidence									
					EI	O	P	WT	S	APEL	Q&A Date	EWE	PD	
a how customer experience is influenced by the way service is delivered														
b how customer feedback is obtained														
c how to work with others to identify and support change in the way service is delivered														
d why it is important to give a positive impression to your customer about the changes made by your organisation even if you disagree with them.														

continued overleaf ...

Feedback/comments:

The candidate has satisfied the assessor and the internal verifier that the performance evidence and criteria, the range, and knowledge and understanding requirements have been achieved.

Candidate's signature:

Date:

Assessor's signature:

Date:

Internal verifier's signature:

Date:

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Unit summary sheet

Unit 28: Allocate and Check Work in Your Team

What is the unit about?

This unit is about ensuring that the work required of your team is effectively and fairly allocated amongst team members. It also involves checking on the progress and quality of the work of team members to ensure that the required level or standard or performance is being met.

Who this unit is for

The unit is recommended for team leaders.

Skills

Listed below are the main generic skills which need to be applied in allocating and checking work in your team. These skills are explicit/implicit in the detailed content of the unit and are listed here as additional information.

- communicating
- providing feedback
- planning
- reviewing
- motivating
- valuing and supporting others
- problem solving
- monitoring
- decision making
- prioritising
- team building
- managing conflict
- information management
- leadership
- coaching
- delegating
- setting objectives
- stress management.

Links to other units

This unit is owned by the Management Standards Centre where it sits within the Working with People suite and appears as Unit D5.

Element achievement record

NVQ title and level: Edexcel Level 3 NVQ in Road Passenger Transport Operations				
Candidate:				
Assessor:				
Unit title: Unit 28 Allocate and Check Work in Your Team				
Performance criteria: You must be able to do the following:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
1	confirm the work required of the team with your manager and seek clarification, where necessary, on any outstanding points and issues			
2	plan how the team will undertake its work, identifying any priorities or critical activities and through resource planning make best use of the available resources taking account of for example shift patterns			
3	allocate work to team members on a fair basis taking account of their skills, knowledge and understanding, experience and workloads and the opportunity for development			
4	brief team members on the work they have been allocated and the standard or level of expected performance			
5	encourage team members to ask questions, make suggestions and seek clarification in relation to the work they have been allocated			
6	check the progress and quality of the work of team members on a regular and fair basis against the standard or level of expected performance and provide prompt and constructive feedback			
7	support team members in identifying and dealing with problems and unforeseen events			
8	motivate team members to complete the work they have been allocated and provide, where requested and where possible, any additional support and/or resources to help completion			
9	monitor the team for conflict, identifying the cause(s) when it occurs and dealing with it promptly and effectively			

continued overleaf ...

Performance criteria: You must be able to do the following:	<i>(Assessor to insert date each time competence is demonstrated)</i>			
10 identify unacceptable or poor performance, discuss the cause(s) and agree ways of improving performance with team members				
11 recognise successful completion of significant pieces of work or work activities by team members and the overall team and advise your manager				
12 use information collected on the performance of team members in any formal appraisal of performance.				
Behaviours which underpin effective performance				
1 You make time available to support others.				
2 You clearly agree what is expected of others and hold them to account.				
3 You prioritise objectives and plan work to make best use of time and resources.				
4 You state your own position and views clearly and confidently in conflict situations.				
5 You show integrity, fairness and consistency in decision-making.				
6 You seek to understand people's needs and motivations.				
7 You take pride in delivering high quality work.				
8 You take personal responsibility for making things happen.				
9 You encourage and support others to make the best use of their abilities.				
10 You are vigilant for possible risks and hazards.				

Feedback/comments:

Assessor's signature:

Date:

Candidate's signature:

Date:

Knowledge evidence record

NVQ title and level: Edexcel Level 3 NVQ in Road Passenger Transport Operations										
Candidate:					Assessor:					
<p>Unit title: Unit 28 Allocate and Check Work in Your Team</p> <p>You must show that you have the knowledge and understanding for this unit. Your performance evidence might help to show this, but it is likely that you will need additional evidence (eg answers to questions). The National Occupational Standards detail the knowledge and understanding required to carry out competent practice for the performance described in this unit.</p> <p>When using the standards it is important to read the knowledge requirements in relation to expectations and requirements of your job role.</p> <p>You need to show that you know, understand and can apply in practice:</p>										
<p>Knowledge and understanding for this unit:</p> <p>You must know and understand the following:</p>					Type of evidence					
					EI	O	P	WT	S	APEL
General knowledge and understanding										
a Different ways of communicating effectively with members of a team.										
b The importance of confirming/clarifying the work required of the team with your manager and how to do this effectively.										
c How to plan the work of a team, including how to identify any priorities or critical activities and the available resources.										
d How to identify and take due account of health and safety issues in the planning, allocation and checking of work.										
e Why it is important to allocate work across the team on a fair basis and how to do so.										
f Why it is important to brief team members on the work they have been allocated and the standard or level of expected performance and how to do so.										
g Ways of encouraging team members to ask questions and/or seek clarification and make suggestions in relation to the work which they have been allocated.										

continued overleaf ...

Knowledge and understanding for this unit: You must know and understand the following:	Type of evidence								
	EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
h Effective ways of regularly and fairly checking the progress and quality of the work of team members.									
i How to provide prompt and constructive feedback to team members.									
j How to select and apply a limited range of different methods for motivating, supporting and encouraging team members to complete the work they have been allocated, improve their performance and for recognising their achievements.									
k The additional support and/or resources which team members might require to help them complete their work and how to assist in providing this.									
l How to handle employment related issues, for example disciplinary and grievance matters									
m Why it is important to monitor the team for conflict and how to identify the cause(s) of conflict when it occurs and deal with it promptly and effectively.									
n Why it is important to identify unacceptable or poor performance by members of the team and how to discuss the cause(s) and agree ways of improving performance with team members.									
o The type of problems and unforeseen events that may occur and how to support team members in dealing with them.									
p How to log information on the ongoing performance of team members and use this information for performance appraisal purposes.									

Knowledge and understanding for this unit: You must know and understand the following:	Type of evidence								
	EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
Industry/sector specific knowledge and understanding									
a Industry/sector specific legislation, regulations, guidelines, codes of practice relating to carrying out work.									
b Industry/sector requirements for the development or maintenance of knowledge, understanding and skills.									
Context specific knowledge and understanding									
a The members, purpose and objectives of your team.									
b The work required of your team.									
c The available resources for undertaking the required work.									
d The organisation's written health and safety policy statement and employment procedures with and associated information and requirements									
e Your team's plan for undertaking the required work.									
f The skills, knowledge and understanding, experience and workloads of team members.									
g Your organisation's policy and procedures in terms of personal development.									
h Reporting lines in the organisation and the limits of your authority.									
i Organisational standards or levels of expected performance.									
j Organisational policies and procedures for dealing with poor performance.									
k Organisational grievance and disciplinary policies and procedures.									
l Organisational performance appraisal systems.									

continued overleaf ...

Feedback/comments:

The candidate has satisfied the assessor and the internal verifier that the performance evidence and criteria, the range, and knowledge and understanding requirements have been achieved.

Candidate's signature:

Date:

Assessor's signature:

Date:

Internal verifier's signature:

Date:

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Unit summary sheet

Unit 29: Manage and Administer Small Businesses in Road Passenger Transport Operations

What is the unit about?

This unit is about the managing and administering a small business.

The unit consists of two elements:

- Element 29.1: Plan and Operate a Small Business
- Element 29.2: Manage Accounting and Administration Functions.

Element 29.1

This element is about what you should consider when thinking about starting or running a business. This will give you the opportunity to test your business ideas and plans, your ability to run the business in an effective and profitable way and your knowledge of any relevant legislation and financial requirements.

Element 29.2

This element is about the knowledge needed to manage the financial and administrative functions of a business in the Road Passenger Transport Industry. You should be able to show your knowledge of legislation and requirement associated with the finances of the business, including the requirements for statutory payments, such as VAT, NI and PAYE.

Who this unit is for

This unit is for owners or directors of small businesses in Road Passenger Transport Operations.

Links to other units

This unit is based on Unit 19 from the GoSkills Road Passenger Vehicle Driving suite.

Element achievement record

NVQ title and level: Edexcel Level 3 NVQ in Road Passenger Transport Operations				
Candidate:				
Assessor:				
Unit title: Unit 29 Manage and Administer Small Businesses in Road Passenger Transport Operations				
Element: 29.1 Plan and Operate a Small Business				
Performance criteria: You must be able to:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
1	develop a basic plan for setting up and running the business including contingency planning			
2	identify the demand for your business, and estimate the potential levels of income			
3	identify how and when you will operate to achieve those levels of income			
4	estimate the costs of running your business			
5	prepare a financial forecast showing costs, earnings, wages etc by week and month			
6	identify the appropriate sources for loans and grants			
7	identify strengths, weaknesses, opportunities and threats for the business			
8	identify opportunities for development of the business such as contracts			
9	access/recognise insurance needs			
10	access staffing resources to deal with operating plans.			

continued overleaf ...

Feedback/comments:

Assessor's signature:

Date:

Candidate's signature:

Date:

Element achievement record

NVQ title and level: Edexcel Level 3 NVQ in Road Passenger Transport Operations				
Candidate:				
Assessor:				
Unit title: Unit 29 Manage and Administer Small Businesses in Road Passenger Transport Operations				
Element: 29.2 Manage accounting and administration functions				
Performance criteria: You must be able to:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
1	maintain financial records for the business, such as expenses, credit cards, payments, earnings, bank statements and invoicing			
2	make NI, tax and VAT payments in accordance with statutory requirements and procedures			
3	identify the type and level of appropriate insurances for the business			
4	maintain and process customer information that complies with legislative requirements.			

Feedback/comments:	
Assessor's signature:	Date:
Candidate's signature:	Date:

Knowledge evidence record

NVQ title and level: Edexcel Level 3 NVQ in Road Passenger Transport Operations										
Candidate:					Assessor:					
<p>Unit title: Unit 29 Manage and Administer Small Businesses in Road passenger Transport Operations</p> <p>You must show that you have the knowledge and understanding for this unit. Your performance evidence might help to show this, but it is likely that you will need additional evidence (eg answers to questions). The National Occupational Standards detail the knowledge and understanding required to carry out competent practice for the performance described in this unit.</p> <p>When using the standards it is important to read the knowledge requirements in relation to expectations and requirements of your job role.</p> <p>You need to show that you know, understand and can apply in practice:</p>										
Knowledge and understanding for this unit:					Type of evidence					
					EI	O	P	WT	S	APEL
Element 29.1										
a	the differences between sole traders, partnerships, limited companies, franchises and co-operatives									
b	the responsibilities and duties of running a business									
c	the responsibilities and duties of the various regulatory bodies									
d	the terms and conditions of trading and managing contracts									
e	the costs and overheads associated with running the business									
f	the sources of finance, such as grants, loans and mortgages									
g	the sources of advice such as Business Link Centres, solicitors, the Small Business Service and accountants									
h	the outside influences that may affect your business and earnings									
i	how to identify and bid for contract work									
j	the requirements for insurance									
k	how to recruit and retain staff.									

continued overleaf ...

Knowledge and understanding for this unit:	Type of evidence								
	EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
Element 29.2									
a the importance and legal obligations of keeping and maintaining financial records for the business									
b the different methods by which book-keeping can be done, such as manual and computerised systems									
c how to work out earnings, costs, cash-flow and profit									
d the requirements concerning payment of NI, tax, and VAT and other statutory payments									
e the importance of the Data Protection Act									
f the role of the banks, different bank accounts, bank interest and charges									
g the levels of protection provided by different insurance policies.									
Feedback/comments:									
The candidate has satisfied the assessor and the internal verifier that the performance evidence and criteria, the range, and knowledge and understanding requirements have been achieved.									
Candidate's signature:							Date:		
Assessor's signature:							Date:		
Internal verifier's signature:							Date:		

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Unit summary sheet

Unit 30: Plan Timetables for Scheduled Road Passenger Transport Services

What is the unit about?

This unit is about how you would plan new or modified timetables. You will understand the circumstances surrounding the need for new or modified timetables and the business implications associated with this work. You will be aware of your organisation's business objectives and the role of the vehicle timetables in helping the organisation meet these objectives.

This unit consists of one element:

- Element 30.1: Prepare New and Modified Timetables.

Element 30.1

This element is about understanding the circumstances that create the need for a new or modified timetable. You will appreciate the business implications associated with timetable planning and will develop an understanding of the techniques involved in preparing a workable, realistic and cost-effective timetable that maximises vehicle usage or loadings. You will have to liaise with operational staff within your organisation and as appropriate outside organisations such as local authorities.

Who this unit is for

This unit is for all those in the Bus and Coach Industry who plan or modify the timetables for scheduled services either as part of a wider role in the organisation or as a full time timetable planner.

Glossary

Your organisation

This would be the company you work for.

Colleague

A fellow worker.

Element achievement record

NVQ title and level: Edexcel Level 3 NVQ in Road Passenger Transport Operations				
Candidate:				
Assessor:				
Unit title: Unit 30 Plan Timetables for Scheduled Road Passenger Transport Services				
Element: 30.1 Prepare New and Modified Timetables				
Performance criteria: You must be able to:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
1	understand and analyse market research, timing and financial reports to identify whether you need to review timetables to meet the organisation's business objectives			
2	produce new or modified timetables that meet business objectives and where appropriate local authority requirements			
3	estimate the possible impact of new and revised timetables on passenger numbers, revenue, costs and service reliability			
4	produce costed proposals for the development of new and revised timetables			
5	put forward to senior management the costed proposals that are in line with the organisational procedures			
6	monitor the effectiveness of new or revised timetables and make further changes where necessary.			

Feedback/comments:	
Assessor's signature:	Date:
Candidate's signature:	Date:

Knowledge evidence record

NVQ title and level: Edexcel Level 3 NVQ in Road Passenger Transport Operations									
Candidate:					Assessor:				
<p>Unit title: Unit 30 Plan Timetables for Scheduled Road Passenger Transport Services</p> <p>You must show that you have the knowledge and understanding for this unit. Your performance evidence might help to show this, but it is likely that you will need additional evidence (eg answers to questions). The National Occupational Standards detail the knowledge and understanding required to carry out competent practice for the performance described in this unit.</p> <p>When using the standards it is important to read the knowledge requirements in relation to expectations and requirements of your job role.</p> <p>You need to show that you know, understand and can apply in practice:</p>									
Knowledge and understanding for this unit:	Type of evidence								
	EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
a how to interpret Operational Costing Reports and the problems associated with implementing new and modified timetables									
b how to interpret market research and timing information from ticket sales and the problems associated with implementing new and modified timetables									
c how to read timetables									
d how to assess vehicle journey times through knowledge of the local area									
e the principles of producing a timetable taking account of all the journey components									
f the likely effects of timetable changes on passenger numbers, revenue, costs and service reliability									
g the differences between the objectives of commercial organisations and that of the local authorities									
h the requirement for services that are run under contract for local authorities, including who has the responsibility for planning any changes to these during the period of the contract									
i how to negotiate and communicate with local authorities, senior management and other colleagues									

continued overleaf ...

Knowledge and understanding for this unit:	Type of evidence								
	EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
j the limits of your authority to modify local authority timetables									
k vehicle and driver scheduling implications of a timetable									
l how to operate your organisation's computer based systems for costing and developing timetables.									

Feedback/comments:

The candidate has satisfied the assessor and the internal verifier that the performance evidence and criteria, the range, and knowledge and understanding requirements have been achieved.

Candidate's signature:

Date:

Assessor's signature:

Date:

Internal verifier's signature:

Date:

COLUMN KEY:	EI = EVIDENCE INDEX NUMBER	O = OBSERVATION	P = PERSONAL STATEMENT
	WT = WITNESS TESTIMONY	S = SIMULATION	APEL = ACCREDITATION OF PRIOR EXPERIENCE AND LEARNING
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Unit summary sheet

Unit 31: Plan Road Passenger Transport Routes for Customers

What is the unit about?

This unit is about understanding the most appropriate route for the customer. You should be able to interpret road and street maps and have knowledge of key roads, hospitals, railway stations and other landmarks. You should be able to understand and agree a route which gets the customer to the place of destination taking into account influences such as traffic and weather conditions. You will also be able to advise on re-routing due to incidents such as closures, heavy traffic etc and keep the customer informed.

This unit consists of two elements:

- Element 31.1: Understand a Customer's Journey
- Element 31.2: Communicate with Customers About Routes.

Element 31.1

This element is about understanding a customer's requirements and the most appropriate route for the customer's journey. This includes how to use street maps and index and grid references to plan a journey between two or more locations. You should be able to arrange a journey using the shortest and/or quickest route and calculate an estimated time for the journey. You should also be able to show knowledge of the main motorways and roads and a more detailed knowledge of your local area, for example, local landmarks, travel services and hospitals.

Element 31.2

This element is about agreeing the journey and destination with the customer. You also need to be able to communicate any delays that may result due to road works, accidents or other incidents. You should understand the need to keep the customer informed. You should be able to obtain information relevant to the journey such as road works, road closures, train times, airport arrival and departure times etc.

Who this unit is for

This unit is for all those working in road passenger transport operations other than drivers.

Glossary

Customer

Includes passengers.

Links to other units

This unit is based on Unit 17 from the GoSkills Road Passenger Vehicle Driving suite.

Element achievement record

NVQ title and level: Edexcel Level 3 NVQ in Road Passenger Transport Operations				
Candidate:				
Assessor:				
Unit title: Unit 31 Plan Road Passenger Transport Routes for Customers				
Element: 31.1 Understand a Customer's Journey				
Performance criteria: You must be able to:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
1	read a road map, street map or IT system as appropriate eg A-Z street map and locate a defined place or destination			
2	arrange a journey between two or more locations			
3	arrange a journey identifying the most suitable and efficient route			
4	identify an alternative route in the event of a delay due to road works, accident or other incidents			
5	summarise directions if required, using for example road numbers, landmarks and distances			
6	estimated time of travel between two or more locations.			
Feedback/comments:				
Assessor's signature:			Date:	
Candidate's signature:			Date:	

Element achievement record

NVQ title and level: Edexcel Level 3 NVQ in Road Passenger Transport Operations				
Candidate:				
Assessor:				
Unit title: Unit 31 Plan Road Passenger Transport Routes for Customers				
Element: 31.2 Communicate with Customers About Routes				
Performance criteria: You must be able to:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
1	communicate effectively with a customer to ensure that correct information is agreed, for example, the start time and place together with the destination			
2	communicate with the customer concerning any anticipated delays and the reason, for example due to road works, accidents or other reasons			
3	give an estimate to the customer on any change to the journey time as a result of an unexpected deviation or delay			
4	provide the customer as appropriate with the method of costing and/or the cost of the fare.			
Feedback/comments:				
Assessor's signature:			Date:	
Candidate's signature:			Date:	

Knowledge evidence record

NVQ title and level: Edexcel Level 3 NVQ in Road Passenger Transport Operations									
Candidate:					Assessor:				
<p>Unit title: Unit 31 Plan Road Passenger Transport Routes for Customers</p> <p>You must show that you have the knowledge and understanding for this unit. Your performance evidence might help to show this, but it is likely that you will need additional evidence (eg answers to questions). The National Occupational Standards detail the knowledge and understanding required to carry out competent practice for the performance described in this unit.</p> <p>When using the standards it is important to read the knowledge requirements in relation to expectations and requirements of your job role.</p> <p>You need to show that you know, understand and can apply in practice:</p>									
Knowledge and understanding for this unit:	Type of evidence								
	EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
Element 31.1									
a	the types and sources of maps and the appropriate ones to use								
b	the location and direction of key cities, airports, landmarks, motorways and major roads outside your local area								
c	the names and location of landmarks and obstacles within your local area, for example, low bridges								
d	the relevant regulations concerning the boundaries and parameters to which the service is allowed to travel or operate.								
Element 31.2									
a	the importance of keeping the customer informed on any anticipated delays to the journey								
b	relevant regulations and/or restrictions on where the driver may collect or drop off a passenger. For example, at an airport or railway station								
c	the importance of understanding the customer's journey requirements, taking into account any potential delays or needs of the customer. For example, meeting hospital appointments, the need to catch a flight or train								

continued overleaf ...

Knowledge and understanding for this unit:	Type of evidence								
	EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
d how to access as appropriate travel news, information on road works, train times, flight arrival and departures									
e the different payment options.									
Feedback/comments:									
The candidate has satisfied the assessor and the internal verifier that the performance evidence and criteria, the range, and knowledge and understanding requirements have been achieved.									
Candidate's signature:							Date:		
Assessor's signature:							Date:		
Internal verifier's signature:							Date:		

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Unit summary sheet

Unit 32: Plan Road Passenger Transport Schedules

What is the unit about?

This unit is about schedule planning for non-timetabled operations in road passenger transport. You will be able to plan resource availability against needs and develop and maintain cost effective schedules for a number of vehicles and drivers. You will also be able to implement and where relevant develop an operational administrative system in order to provide an efficient customer led service.

This unit consists of one element:

- Element 32.1: Plan the scheduling of road passenger transport.

Element 32.1

This element is about planning the scheduling of drivers and vehicles to provide an effective service to customers.

Who this unit is for

This unit is for senior dispatchers and schedulers working in Taxi, Private Hire Vehicle, Community Transport and Chauffeuring.

Glossary

Your organisation

This would be the company you work for or, if you are self employed, the rules you have set for yourself to ensure that you comply with relevant legal and licensing requirements.

Element achievement record

NVQ title and level: Edexcel Level 3 NVQ in Road Passenger Transport Operations				
Candidate:				
Assessor:				
Unit title: Unit 32 Plan Road Passenger Transport Schedules				
Element: 32.1 Plan the Scheduling of Road Passenger Transport				
Performance criteria: You must be able to:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
1	identify future resource needs against the business development plans			
2	develop driver and vehicle resource strategies to support planned outcomes			
3	implement and where necessary develop administrative systems to ensure the planned outcomes are achieved			
4	identify and communicate priorities, responsibilities and timelines to those who implement the schedules			
5	operate a communication strategy to keep all informed			
6	identify internal and external factors which may impact on achieving the planned and agreed outcomes			
7	collaborate with relevant personnel on the schedules to achieve identified operational outcomes.			
Feedback/comments:				
Assessor's signature:			Date:	
Candidate's signature:			Date:	

Knowledge evidence record

NVQ title and level: Edexcel Level 3 NVQ in Road Passenger Transport Operations									
Candidate:					Assessor:				
<p>Unit title: Unit 32 Plan Road Passenger Transport Schedules</p> <p>You must show that you have the knowledge and understanding for this unit. Your performance evidence might help to show this, but it is likely that you will need additional evidence (eg answers to questions). The National Occupational Standards detail the knowledge and understanding required to carry out competent practice for the performance described in this unit.</p> <p>When using the standards it is important to read the knowledge requirements in relation to expectations and requirements of your job role.</p> <p>You need to show that you know, understand and can apply in practice:</p>									
Knowledge and understanding for this unit:	Type of evidence								
	EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
a the business goals to achieve operational outcomes									
b the future resource needs to meet development plans, and how to implement these effectively									
c the IT and manual operational administrative systems									
d how to prioritise and communicate the needs of the operations to others who deliver the service									
e how to communicate the priorities of the business operations to others									
f the internal and external factors that will have an impact on the delivery of the schedules									
g how to work with others to achieve the required outcomes of the business									
h the needs and support requirements of those implementing the schedules.									

continued overleaf ...

Feedback/comments:

The candidate has satisfied the assessor and the internal verifier that the performance evidence and criteria, the range, and knowledge and understanding requirements have been achieved.

Candidate's signature:

Date:

Assessor's signature:

Date:

Internal verifier's signature:

Date:

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Unit summary sheet

Unit 33: Generate Sales of Products and Services in Road Passenger Transport Operations

What is the unit about?

This unit describes what skills you need to generate sales of products and services in the Road Passenger Transport Industry. This is primarily through contacting existing and potential customers. The unit also considers how you can evaluate your success in increasing cost effective sales.

When you have completed this unit, you will have shown that you can:

- identify and develop contacts to make and increase sales
- sell road passenger transport products and services
- evaluate your success in sales for your organisation.

The unit consists of three elements:

- Element 33.1: Identify Contacts to Make and Increase Sales
- Element 33.2: Sell Road Passenger Transport Products and Services
- Element 33.3: Evaluate Your Success in Increasing Sales.

Element 33.1

This element is about identifying potential sales targets and contacts. You will need to know how to do this in a cost effective manner whilst still meeting any agreed sales objectives. You will need to know the limits of your authority in developing sales contacts and the basis for evaluating how successful you are in selling products and services.

Element 33.2

This element is about selling Road Passenger Transport products and services and where appropriate increasing the level of sales within the limits of your authority. This will primarily be through customer contact and communication with new and existing customers is a critical aspect of this element.

Element 33.3

This element is about understanding the need for and evaluating success in meeting sales targets. Keeping and interpreting records related to the limits of your responsibility is an important aspect of this element.

Who this unit is for

This unit is for all those in the Road Passenger Transport Industry who have responsibility for selling industry related products and services.

Glossary

Your organisation

This would be the company you work for or your own organisation.

Element achievement record

NVQ title and level: Edexcel Level 3 NVQ in Road Passenger Transport Operations				
Candidate:				
Assessor:				
Unit title: Unit 33 Generate Sales of Products and Services in Road Passenger Transport Operations				
Element: 33.1 Identify Contacts to Make and Increase Sales				
Performance criteria: You must be able to:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
1	accurately identify and agree your sales objectives and targets with the relevant person(s)			
2	identify suitable potential sales leads from researching your existing customers and discussion with colleagues			
3	identify products and services of potential interest to customers based on their previous take-up of your organisation's products or services			
4	agree suitable ways of evaluating the success of your sales.			
Feedback/comments:				
Assessor's signature:			Date:	
Candidate's signature:			Date:	

Element achievement record

NVQ title and level: Edexcel Level 3 NVQ in Road Passenger Transport Operations				
Candidate:				
Assessor:				
Unit title: Unit 33 Generate Sales of Products and Services in Road Passenger Transport Operations				
Element: 33.2 Sell Road Passenger Transport Products and Services				
Performance criteria: You must be able to:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
1	select and use the most effective methods and times for contacting your customers			
2	promote Road Passenger Transport products and services that are likely to interest your customer, based on previous history			
3	adapt your sales technique to customers and adjust your approach to their reaction			
4	identify and provide accurate information on any other Road Passenger Transport products or services that may be of interest to your customer			
5	recognise and make the most of any opportunities for increasing your sales			
6	keep an accurate record of who you have contacted, any action you need to take and any sales you have made			
7	communicate clearly with your colleagues on any follow up actions that need to be taken			
8	keep an accurate record of any changes to customers' activities which impact on the services and products offered by your organisation.			

continued overleaf ...

Feedback/comments:

Assessor's signature:

Date:

Candidate's signature:

Date:

Element achievement record

NVQ title and level: Edexcel Level 3 NVQ in Road Passenger Transport Operations				
Candidate:				
Assessor:				
Unit title: Unit 33 Generate Sales of Products and Services in Road Passenger Transport Operations				
Element: 33.3 Evaluate your Success in Increasing Sales				
Performance criteria: You must be able to:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
1	use the agreed methods of evaluation effectively			
2	compare accurately sales made against your agreed objectives and targets and giving reasons for the results			
3	note and use feedback from colleagues and the results of your own self-assessment to make recommendations for future sales activity for Road Passenger Transport services			
4	forward the results of your evaluation promptly to the relevant person(s) in your organisation.			
Feedback/comments:				
Assessor's signature:			Date:	
Candidate's signature:			Date:	

Knowledge evidence record

NVQ title and level: Edexcel Level 3 NVQ in Road Passenger Transport Operations									
Candidate:					Assessor:				
<p>Unit title: Unit 33 Generate Sales of Products and Services in Road Passenger Transport Operations</p> <p>You must show that you have the knowledge and understanding for this unit. Your performance evidence might help to show this, but it is likely that you will need additional evidence (eg answers to questions). The National Occupational Standards detail the knowledge and understanding required to carry out competent practice for the performance described in this unit.</p> <p>When using the standards it is important to read the knowledge requirements in relation to expectations and requirements of your job role.</p> <p>You need to show that you know, understand and can apply in practice:</p>									
Knowledge and understanding for this unit:	Type of evidence								
	EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
Element 33.1									
a	the services and products of your company								
b	the objectives of any sales initiatives in your organisation, its targets and your role within it								
c	how to identify potential sales leads, for example, market research and analysis of the customer database								
d	how to set sales targets and monitor performance against them								
e	the importance of evaluating progress.								
Element 33.2									
a	how to identify effective ways of contacting your customers								
b	why it is important to show an interest in your customers by having a professional attitude and creating a positive impression using your own and colleagues' knowledge and experience of Road Passenger Transport products and services								
c	how to use ethical selling techniques to make cost effective sales, including establishing rapport								

continued overleaf ...

Knowledge and understanding for this unit:	Type of evidence								
	EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
d how to effectively present a sales opportunity to customers to generate further interest in your organisation's products and services									
e how to adapt your sales approach to meet different customer reaction									
f how to recognise sales opportunities									
g the purpose and method of maintaining accurate records of contact with customer									
h the colleagues to whom information about potential follow up actions should be supplied.									
Element 33.3									
a how to undertake the evaluation process and know why it is important									
b how the success of your sales activity will be evaluated									
c how to use the outcomes of current customer contact to inform future approaches to customers									
d the colleagues from whom information can be obtained on the effectiveness of measures to increase sales									
e how to report your evaluation.									

Feedback/comments:

The candidate has satisfied the assessor and the internal verifier that the performance evidence and criteria, the range, and knowledge and understanding requirements have been achieved.

Candidate's signature:

Date:

Assessor's signature:

Date:

Internal verifier's signature:

Date:

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Unit summary sheet

Unit 34: Manage and Store Information

What is the unit about?

This unit is about the use of organisational systems to manage, research, store and present information. You will need to apply the following skills:

- communicating
- interpersonal skills
- managing resources
- managing time
- negotiating
- organising
- planning
- presenting yourself
- problem solving
- quality checking
- recording
- using technology.

This unit consists of two elements:

- Element 34.1: Use, Research and Store Information
- Element 34.2: Present Information.

Element 34.1

This element is about the use and storing of information. You will be able to know the information you require, how to find and use. You will be able to return existing and new information to store. You will also know where to distribute information both within and external to your organisation

Element 34.2

This element is about presenting information in a way that is most effective to those receiving it. You will be able to use a range of manual or IT based formats and also present information to individuals or groups within the limit of your responsibility.

Who this unit is for

This unit is for all those in road passenger transport operations who have responsibility for managing and storing information as part of their job.

Glossary

Your organisation

This would be the company you work for or, if you are self employed, the rules you have set for yourself to ensure that you comply with relevant legal and licensing requirements.

Links to other units

This unit is owned by the Council for Administration where it sits within the Self Administration suite as Unit 4. This unit has been reformatted into GoSkills house style.

Element achievement record

NVQ title and level: Edexcel Level 3 NVQ in Road Passenger Transport Operations				
Candidate:				
Assessor:				
Unit title: Unit 34 Manage and Store Information				
Element: 34. 1 Use, Research and Store Information				
Performance criteria: You must be able to:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
1	be clear about the information you need for your work			
2	access relevant information sources and manipulate databases where necessary			
3	locate appropriate information efficiently			
4	explore the relevant information, extracting the parts you need for your work			
5	identify where information is relevant to other members of your organisation			
6	organise and record the information in a way that will be useful to you and others			
7	record your sources of information			
8	store the information securely according to organisational procedures and in a way that will help you and others retrieve it in the future			
9	safeguard confidential information.			

continued overleaf ...

Feedback/comments:

Assessor's signature:

Date:

Candidate's signature:

Date:

Element achievement record

NVQ title and level: Edexcel Level 3 NVQ in Road Passenger Transport Operations				
Candidate:				
Assessor:				
Unit title: Unit 34 Manage and Store Information				
Element: 34.2 Present Information				
Performance criteria: You must be able to:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
1	assess the reasons for presenting information, the intended audience, the timing, expected style and the equipment that you will need			
2	prepare how you will present the information in a way best suited to the these requirements			
3	analyse and present the information clearly, logically and within agreed timescales			
4	highlight the key points			
5	deal with questions and suggestions effectively			
6	evaluate the outcomes of the presentation.			

Feedback/comments:	
Assessor's signature:	Date:
Candidate's signature:	Date:

Knowledge evidence record

NVQ title and level: Edexcel Level 3 NVQ in Road Passenger Transport Operations										
Candidate:					Assessor:					
<p>Unit title: Unit 34 Manage and Store Information</p> <p>You must show that you have the knowledge and understanding for this unit. Your performance evidence might help to show this, but it is likely that you will need additional evidence (eg answers to questions). The National Occupational Standards detail the knowledge and understanding required to carry out competent practice for the performance described in this unit.</p> <p>When using the standards it is important to read the knowledge requirements in relation to expectations and requirements of your job role.</p> <p>You need to show that you know, understand and can apply in practice:</p>										
Knowledge and understanding for this unit:				Type of evidence						
				EI	O	P	WT	S	APEL	Q&A Date
Element 34.1										
a	why it is important to be clear about what information you need to find before you begin a search									
b	the main sources of information you can use when carrying out research									
c	why it is important to keep a record of your sources									
d	the relevant manual and electronic systems used in your organisation, for storing, organising and finding information and how to use these									
e	how to explore information to find precisely the information that you need									
f	how to identify information that will be helpful to others and why information sharing is important									
g	how to organise and record information in a way that will be helpful to yourself and others									
h	why it is important to store information securely									
i	what is confidential information and how you should handle it									
j	why you should store information in a way that will help you and others find it in the future									

continued overleaf ...

Knowledge and understanding for this unit:	Type of evidence								
	EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
k how to store information in a way that will help you and others find it in the future									
l relevant legislation and your organisation's procedures for storing and retrieving information.									
Element 34.2									
a why it is important to know the reasons for presenting information, intended audience, timings and expected style, including your organisation's house style									
b the different formats in which you may be required to present information and how to prepare these as suited to requirements, including the equipment that you will need to use									
c how to present, analyse and evaluate information clearly and logically									
d the importance of meeting timescales									
e how to identify and emphasise the key points in the information you are presenting and why this is important									
f how to deal with questions and suggestions effectively and why this is important									
g why it is important to evaluate the outcomes of the presentation.									

Feedback/comments:

The candidate has satisfied the assessor and the internal verifier that the performance evidence and criteria, the range, and knowledge and understanding requirements have been achieved.

Candidate's signature:

Date:

Assessor's signature:

Date:

Internal verifier's signature:

Date:

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Unit summary sheet

Unit 35: Supervise the Cleaning of Road Passenger Transport Vehicles

What is the unit about?

This unit is about supervising the cleaning of road passenger carrying vehicles. You should be able to ensure that vehicles are cleaned safely so that they are well presented for passengers travelling in the vehicle.

This unit consists of two elements:

- Element 35.1: Supervise the Effective Cleaning of Vehicles
- Element 35.2: Ensure Good Health and Safety Practices are Maintained when Cleaning the Vehicle.

Element 35.1

This element is about effectively cleaning and presenting a vehicle in a professional way.

Element 35.2

This element is about how you ensure the health and safety procedures are followed when the vehicle is cleaned.

Who this unit is for

This unit is for staff working in Road Passenger Transport Operations who have responsibility for ensuring vehicles are clean and properly presented to passengers.

Glossary

Your limits of authority

These would be the guidelines laid down by the company you work for or, if you are self employed, the rules you have set for yourself to ensure that you comply with relevant health and safety requirements.

Links to other units

This unit is based on Unit 15 from the GoSkills Road Passenger Vehicle Driving suite.

Element achievement record

NVQ title and level: Edexcel Level 3 NVQ in Road Passenger Transport Operations				
Candidate:				
Assessor:				
Unit title: Unit 35 Supervise the Cleaning of Road Passenger Transport Vehicles				
Element: 35.1 Supervise the Effective Cleaning of Vehicles				
Performance criteria: You must be able to:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
1	help vehicle cleaners achieve the best finish when cleaning the vehicle			
2	ensure the vehicles are cleaned in a way that preserves the standard of appearance			
3	ensure effective use is made of cleaning materials and working methods			
4	ensure vehicles give a professional image in terms of cleanliness			
5	ensure substances left by passengers have been properly removed, for example, bodily fluids.			

Feedback/comments:	
Assessor's signature:	Date:
Candidate's signature:	Date:

Element achievement record

NVQ title and level: Edexcel Level 3 NVQ in Road Passenger Transport Operations				
Candidate:				
Assessor:				
Unit title: Unit 35 Supervise the Cleaning of Road Passenger Transport Vehicles				
Element: 35. 2 Ensure Good Health and Safety Practices are Maintained when Cleaning the Vehicle				
Performance criteria: You must be able to:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
1	ensure the vehicle is cleaned with no risk to the cleaner and others			
2	ensure substances used for cleaning are used, handled and stored correctly and safely			
3	ensure substances are disposed correctly and in line with legislative requirements or guidelines			
4	recognise the possible hazards of substances used for vehicle cleaning and advise vehicle cleaners as appropriate			
5	carry out within the limits of your capability an inspection of electrical and mechanical equipment used for cleaning the vehicle			
6	ensure all involved in vehicle cleaning use safe working practices.			

Feedback/comments:	
Assessor's signature:	Date:
Candidate's signature:	Date:

Knowledge evidence record

NVQ title and level: Edexcel Level 3 NVQ in Road Passenger Transport Operations										
Candidate:					Assessor:					
<p>Unit title: Unit 35 Supervise the Cleaning of Road Passenger Transport Vehicles</p> <p>You must show that you have the knowledge and understanding for this unit. Your performance evidence might help to show this, but it is likely that you will need additional evidence (eg answers to questions). The National Occupational Standards detail the knowledge and understanding required to carry out competent practice for the performance described in this unit.</p> <p>When using the standards it is important to read the knowledge requirements in relation to expectations and requirements of your job role.</p> <p>You need to show that you know, understand and can apply in practice:</p>										
Knowledge and understanding for this unit:				Type of evidence						
				EI	O	P	WT	S	APEL	Q&A Date
Element 35.1										
a	the importance of having a clean vehicle									
b	how to prepare the vehicle for cleaning									
c	the process for removing excess dirt, salt and debris									
d	the cleaning materials available for different body parts and finishes									
e	the methods for removing substances left by passengers									
f	how to achieve the best finish when cleaning the vehicle									
g	the importance of ensuring that those cleaning vehicles have the appropriate skills and knowledge									
h	how to give support to those cleaning the vehicle.									

continued overleaf ...

Knowledge and understanding for this unit:	Type of evidence								
	EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
Element 35.2									
a the health and safety risks when cleaning a vehicle									
b which materials and substances may cause injury or harm									
c how to eliminate or reduce the risk of injury or harm									
d the importance of personal hygiene for all involved in vehicle cleaning, for example, washing hands after contact with certain substances									
e how to safely use, handle and store substances that are hazardous									
f how to use electrical appliances safely									
g safe working practices									
h the approved way for getting rid of substances and dangerous objects including knowledge of any relevant legislation									
i the importance of ensuring that those cleaning vehicles appreciate the importance of safe working practices and have the appropriate skills and knowledge									
j how to give health and safety support to those cleaning the vehicle.									

Feedback/comments:

The candidate has satisfied the assessor and the internal verifier that the performance evidence and criteria, the range, and knowledge and understanding requirements have been achieved.

Candidate's signature:

Date:

Assessor's signature:

Date:

Internal verifier's signature:

Date:

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Unit summary sheet

Unit 36: Improve the Customer Service Relationship

What is the unit about?

To improve relationships with your customers you will need to deliver consistent and reliable customer service. In addition, customers will need to feel that you genuinely want to give them high levels of service and that you will make every possible effort to meet or exceed their expectations. This will encourage loyalty from external customers or longer-term service partnerships with internal customers.

You will need to be proactive in your dealings with your customers and to respond professionally in all situations. You will need to negotiate between your customers and your organisation or department in order to find some way of meeting your customers' expectations. In addition you will need to make extra efforts to delight your customers by giving higher levels of service than they expect.

This unit consists of three elements:

- Element 36.1: Improve Communication with Your Customers
- Element 36.2: Balance the Needs of your Customer and Your Organisation
- Element 36.3: Exceed Customer Expectations to Develop the Relationship.

The key words and phrases for this unit are:

- improve communication
- adapt communication
- recognise customers' feelings
- exceed expectations
- develop relationships
- balance needs
- costs and needs
- negotiate.

Who this unit is for

This unit is for all those whose work brings them into contact with customers.

Links to other units

This unit is owned by the Institute of Customer Service where it sits within the Customer Service Theme of Delivery where it appears as Unit 26. This Theme covers the Customer Service behaviours and processes that have the most effect on the customer experience during Customer Service delivery.

Element achievement record

NVQ title and level: Edexcel Level 3 NVQ in Road Passenger Transport Operations				
Candidate:				
Assessor:				
Unit title: Unit 36 Improve the Customer Service Relationship				
Element: 36.1 Improve Communication with Your Customers				
Performance criteria: When you improve the customer relationship you must consistently:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
1	select and use the best method of communication to meet you customers' expectations			
2	take the initiative to contact your customers to update them when things are not going to plan or when you require further information			
3	adapt your communication to respond to individual customers' feelings.			
Feedback/comments:				
Assessor's signature:		Date:		
Candidate's signature:		Date:		

Element achievement record

NVQ title and level: Edexcel Level 3 NVQ in Road Passenger Transport Operations				
Candidate:				
Assessor:				
Unit title: Unit 36 Improve the Customer Service Relationship				
Element: 36.2 Balance the Needs of your Customer and Your Organisation				
Performance criteria: When you improve the customer relationship you must consistently:			<i>(Assessor to insert date each time competence is demonstrated)</i>	
1	meet your customers' expectations within your organisation's service offer			
2	explain the reasons to your customers sensitively and positively when their expectations cannot be met			
3	identify alternative solutions for your customers either within or outside the organisation			
4	identify the costs and benefits of these solutions to your organisation and to your customers			
5	negotiate and agree solutions with your customers which satisfy them and are acceptable to you organisation			
6	take action to satisfy your customers with the agreed solution.			

Feedback/comments:	
Assessor's signature:	Date:
Candidate's signature:	Date:

Element achievement record

NVQ title and level: Edexcel Level 3 NVQ in Road Passenger Transport Operations				
Candidate:				
Assessor:				
Unit title: Unit 36 Improve the Customer Service Relationship				
Element: 36.3 Exceed Customer Expectations to Develop the Relationship				
Performance criteria: When you improve the customer relationship you must consistently:			<i>(Assessor to insert date each time competence is demonstrated)</i>	
1	make extra efforts to improve your relationship with your customers			
2	recognise opportunities to exceed your customers' expectations			
3	take action to exceed your customers' expectations within the limits of your own authority			
4	gain the help and support of others to exceed your customers' expectations.			

Feedback/comments:	
Assessor's signature:	Date:
Candidate's signature:	Date:

Knowledge evidence record

NVQ title and level: Edexcel Level 3 NVQ in Road Passenger Transport Operations									
Candidate:					Assessor:				
<p>Unit title: Unit 36 Improve the Customer Service Relationship</p> <p>You must show that you have the knowledge and understanding for this unit. Your performance evidence might help to show this, but it is likely that you will need additional evidence (eg answers to questions). The National Occupational Standards detail the knowledge and understanding required to carry out competent practice for the performance described in this unit.</p> <p>When using the standards it is important to read the knowledge requirements in relation to expectations and requirements of your job role.</p> <p>You need to show that you know, understand and can apply in practice:</p>									
Knowledge and understanding for this unit:	Type of evidence								
	EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
a how to make best use of the method of communication chosen for dealing with your customers									
b how to negotiate effectively with your customers									
c how to assess the costs and benefits to your customer and your organisation of any unusual agreement									
d the importance of customer loyalty and/or improved internal customer relationships to you organisation.									

continued overleaf ...

Feedback/comments:

The candidate has satisfied the assessor and the internal verifier that the performance evidence and criteria, the range, and knowledge and understanding requirements have been achieved.

Candidate's signature:

Date:

Assessor's signature:

Date:

Internal verifier's signature:

Date:

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Unit summary sheet

Unit 37: Operate an IT System in Road Passenger Transport Operations

What is the unit about?

This unit is about your, and where appropriate your team's, ability to use an IT system safely and effectively. You will be able to carry out the initial steps in using an IT system, operate systems in an effective way and close the systems down securely. You will be able to recognise faults in the system and correct common faults. You will appreciate the limit of your technical expertise in this area and will know when and how to get professional help. You will be able to maintain the work schedules of yourself, and where appropriate your team, during system failures and be able to update data when the system is restored. You will at all times work within your organisation's procedures, including health and safety, and legal regulation when operating an IT system.

The unit consists of one element:

- Element 37.1: Use an IT System.

Element 37.1

This element is about using the IT systems available in your organisation that are relevant to your work. You will need to demonstrate that you are fully aware of your responsibilities in using the system correctly to obtain maximum benefit from it. You will be able to recognise system faults and correct common errors though importantly you will know when to obtain specialist help and advice. You will be able to maintain work activity as far as possible during system failure and importantly be able to update the system when it is restored. At all times you will operate the IT system to protect security of data and ensure your organisation's health and safety procedures are followed.

Who this unit is for

This unit is for all those in road passenger transport operations who use IT systems at work.

Glossary

Your organisation

This would be the company you work for or, if you are self employed, the rules you have set for yourself to ensure that you comply with relevant legal and licensing requirements.

IT System

IT equipment and packages relevant to your role and as appropriate bespoke equipment relating to the Road Passenger Transport Industry, for example, GPS, text booking systems etc.

Element achievement record

NVQ title and level: Edexcel Level 3 NVQ in Road Passenger Transport Operations				
Candidate:				
Assessor:				
Unit title: Unit 37 Operate an IT System in Road Passenger Transport Operations				
Element: 37.1 Use an IT System				
Performance criteria: You must be able to:		<i>(Assessor to insert date each time competence is demonstrated)</i>		
1	start up and correctly use the different types of IT systems and hardware used in your work			
2	use IT hardware in a way that conforms with good health and safety practice			
3	identify and correct common errors on the IT systems and hardware that you use			
4	seek immediate assistance when difficulties occur with the IT system			
5	maintain work schedules during system failures eg operating vehicle schedules, timetable planning and ensure files are updated when the system is restored			
6	use the internet as appropriate for the work undertaken by you and where appropriate your team eg interacting with other stakeholders in Road Passenger Transport			
7	close down the IT system without damage and maintaining security of data			
8	ensure computer hardware and programme disks are kept securely located			
9	ensure that you, and where relevant your team, have regard to relevant legal regulations when operating IT systems.			

continued overleaf ...

Feedback/comments:

Assessor's signature:

Date:

Candidate's signature:

Date:

Knowledge evidence record

NVQ title and level: Edexcel Level 3 NVQ in Road Passenger Transport Operations									
Candidate:					Assessor:				
<p>Unit title: Unit 37 Operate an IT System in Road Passenger Transport Operations</p> <p>You must show that you have the knowledge and understanding for this unit. Your performance evidence might help to show this, but it is likely that you will need additional evidence (eg answers to questions). The National Occupational Standards detail the knowledge and understanding required to carry out competent practice for the performance described in this unit.</p> <p>When using the standards it is important to read the knowledge requirements in relation to expectations and requirements of your job role.</p> <p>You need to show that you know, understand and can apply in practice:</p>									
Knowledge and understanding for this unit:	Type of evidence								
	EI	O	P	WT	S	APEL	Q&A Date	EWE	PD
a the computer hardware available in your organisation and how to get the best out of it									
b the health and safety requirements in operating IT hardware									
c the limits of your IT technical competence and how to get appropriate advice both on the use of IT systems and remedial action in the event of a system failure									
d the effect of system failures on your work and the importance of updating data in the IT system when the failure has been rectified									
e the risks to your organisation's IT system from downloading from the internet									
f the IT systems closing down procedure and your organisation's policy for storing and securing data									
g the relevant security and legal regulations including data protection legislation, copyright and Display Screen Equipment (DSE) legislation.									

continued overleaf ...

Feedback/comments:

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Date:

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Date:

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Evidence Requirements

Road Passenger Transport Operations			Performance Requirements							Knowledge and Understanding Requirements		
Unit No	Unit Title	Element No	Simulation Allowed?	Observation	Witness Testimony	Response to Questions Written/Oral	Professional Discussion	Written Evidence	Product Evidence	Oral Questions	Written Questions	Professional discussion
3	Provide Professional Customer Service in Road Passenger Transport Operations	3.1	X	✓	✓	✓	✓	✓	✓	✓	✓	✓
		3.2	X	✓	✓	✓	✓	✓	✓	✓	✓	✓
		3.3	X	✓	✓	✓	✓	✓	✓	✓	✓	✓
4	Ensure Health and Safety and Deal with Incidents, Accidents and Emergencies in Your Work Environment in Road Passenger Transport Operations	4.1	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
		4.2	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
		4.3	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
5	Develop Productive Working Relationships with Colleagues	5.1	X	X	✓	✓	✓	✓	✓	✓	✓	✓
6	Manage Operator Risks and Liabilities in Road Passenger Transport Operations	6.1	X	✓	✓	✓	✓	✓	✓	✓	✓	✓
7	Provide Leadership for Your Team	7.1	X	X	✓	X	✓	✓	✓	✓	✓	✓
9	Develop and Maintain Your Work Skills and Knowledge in Road Passenger Transport Operations	9.1	X	✓	✓	✓	✓	✓	✓	✓	✓	✓
10	Manage Conflict in Road Passenger Transport Operations	10.1	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
		10.2	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓

Road Passenger Transport Operations			Performance Requirements							Knowledge and Understanding Requirements		
Unit No	Unit Title	Element No	Simulation Allowed?	Observation	Witness Testimony	Response to Questions Written/Oral	Professional Discussion	Written Evidence	Product Evidence	Oral Questions	Written Questions	Professional discussion
12	Support Learners by Mentoring in the Workplace	12.1	X	✓	✓	X	✓	X	X	✓	✓	✓
13	Resolve Customer Service Problems	13.1	X	✓	✓	✓	✓	✓	✓	✓	✓	✓
		13.2	X	✓	✓	✓	✓	✓	✓	✓	✓	✓
		13.3	X	✓	✓	✓	✓	✓	✓	✓	✓	✓
14	Process Customer Service Complaints	14.1	X	✓	✓	✓	✓	✓	✓	✓	✓	✓
		14.2	X	✓	✓	✓	✓	✓	✓	✓	✓	✓
18	Support Customer Service Improvements	18.1	X	✓	✓	✓	✓	✓	✓	✓	✓	✓
		18.2	X	✓	✓	✓	✓	✓	✓	✓	✓	✓
		18.3	X	✓	✓	✓	✓	✓	✓	✓	✓	✓
28	Allocate and Check Work in Your Team	28.1	X	X	✓	✓	✓	✓	✓	✓	✓	✓
29	Manage and Administer Small Businesses in Road Passenger Transport Operations	29.1	X	✓	✓	✓	✓	✓	✓	✓	✓	✓
		29.2	X	✓	✓	✓	✓	✓	✓	✓	✓	✓
30	Plan Timetables for Scheduled Road Passenger Transport Services	30.1	X	✓	✓	✓	✓	✓	✓	✓	✓	✓

Road Passenger Transport Operations			Performance Requirements							Knowledge and Understanding Requirements		
Unit No	Unit Title	Element No	Simulation Allowed?	Observation	Witness Testimony	Response to Questions Written/Oral	Professional Discussion	Written Evidence	Product Evidence	Oral Questions	Written Questions	Professional discussion
31	Plan Road Passenger Transport Routes for Customers	31.1	X	✓	✓	✓	✓	✓	✓	✓	✓	✓
		31.2	X	✓	✓	✓	✓	✓	✓	✓	✓	✓
32	Plan Road Passenger Transport Schedules	32.1	X	✓	✓	✓	✓	✓	✓	✓	✓	✓
33	Generate Sales of Products and Services in Road Passenger Transport Operations	33.1	X	✓	✓	✓	✓	✓	✓	✓	✓	✓
		33.2	X	✓	✓	✓	✓	✓	✓	✓	✓	✓
		33.3	X	✓	✓	✓	✓	✓	✓	✓	✓	✓
34	Manage and Store Information	34.1	X	✓	✓	✓	✓	✓	✓	✓	✓	✓
		34.2	X	✓	✓	✓	✓	✓	✓	✓	✓	✓
35	Supervise the Cleaning of Passenger Transport Vehicles	35.1	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
		35.2	X	✓	✓	✓	✓	✓	✓	✓	✓	✓
36	Improve the Customer Service Relationship	36.1	X	✓	✓	✓	✓	✓	✓	✓	✓	✓
		36.2	X	✓	✓	✓	✓	✓	✓	✓	✓	✓
		36.3	X	✓	✓	✓	✓	✓	✓	✓	✓	✓
37	Operate an IT System in Road Passenger Transport Operations	37.1	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓

Glossary

This section provides explanations and definitions of the key words used in this NVQ. In occupational standards it is quite common to find words or phrases used which you will be familiar with, but which, in the detail of the standards, may be used in a very particular way. **Therefore, we would encourage you to read this section carefully before you begin working with the standards and to refer back to this section as required.**

Assessment	the process of generating and collecting evidence of a candidate's performance and judging that evidence against defined criteria.
Assessor	the person in a centre designated to be responsible for collecting evidence of candidate's competence, judging it and recording achievement.
Authentication	the process by which an advisor or assessor confirms that assessment activity has been undertaken by a particular candidate and that all regulations governing the assessment have been observed.
Candidate	the person enrolling for an Edexcel NVQ, the college.
Centre	training organisation, school or workplace where Edexcel qualifications are delivered and assessed.
Evidence	materials the candidate has to provide as proof of their competence against specified achievement criteria.
External verifier	the person appointed by Edexcel 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 groups of similar 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.
Mentor	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.

Observation	a means of assessment in which the candidate is observed carrying out tasks that reflect the performance criteria.
Performance criteria	statements which describe the standard to which candidates must perform the activities.
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.

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