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**Appendix: Specific Assessment Strategy**

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| **Sector** | **Customer Service, Retail and Travel** |
| **Qualification Title(s)** | **Diploma in Providing Customer Services at SCQF Level 5****Diploma in Providing Retail Services at SCQF Level 5****Diploma in Providing Travel Services at SCQF Level 5****Diploma in Providing Customer Services at SCQF Level 6****Diploma in Providing Retail Services at SCQF Level 6****Diploma in Providing Travel Services at SCQF Level 6** |
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| **Approved by ACG** | **29/05/2024** |
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**(For use with the Overarching Assessment Strategy for competence-based qualifications)**

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#### **Introduction**

#### The purpose of an assessment strategy is to provide awarding bodies with a consistent approach to assessment and quality assurance that complies with SQA Accreditation’s regulatory requirements.

#### The key areas this assessment strategy will cover are:

#### assessment requirements

#### the extent to which simulation may be used

#### the assessment environment, including what constitutes a realistic working environment when assessing competence

#### the roles and requirements of assessor and quality assurers

#### external quality assurance requirements for awarding bodies

# 1. Purpose and use

This specific Assessment Strategy Appendix for the qualifications relating to Customer Service, Retail and Travel sets out the assessment and quality assurance requirements that are specific to these qualifications. This assessment strategy appendix must be used alongside the Overarching Assessment Strategy for Competence-based Qualifications.

Customer Service, Retail and Travel at SQCF Level 5 and Customer Service, Retail and Travel at SQCF Level 6are designed to recognise competence of agents, consultants and assistants and advisors amongst other roles. All competency-based qualifications require that the learner is employed in a relevant role and that workplace learning, is aligned to and assessed against the performance requirements, knowledge and understanding requirements, and the Meta-skills set out.

This specific assessment strategy has been agreed with relevant awarding bodies and other relevant stakeholders as part of the qualification design process.

# 2. Generic requirements

## 2.1 Quality assurance requirements

**External quality assurance of assessment**

The requirements for the external quality assurance of assessment are set out in section 2.1 of the Overarching Assessment Strategy for Competence-based Qualifications. There are no further requirements specific to these qualifications.

**Workplace assessment**

This outlines the guidance for assessing performance in the workplace. To be used in addition to the Overarching Assessment Strategy for competence-based qualifications. For these specific qualifications, the following applies:

The Customer Service, Retail and Travel qualifications will be delivered and assessed in the workplace. This is the environment in which learners will routinely be engaged in providing customer experiences to support their own organisation in delivering products and services through the application of knowledge, skills and behaviours in retail, travel and pan sector customer service focused roles. These qualifications are designed to recognise competence in the application of knowledge, skills and behaviours in different sectoral contexts.

This requires that learners are in a relevant role and that work-based learning is aligned to, and assessed against, qualification unit performance requirements and knowledge and understanding requirements. This is the primary environment in which learners develop and evidence the performance, knowledge and understanding requirements and meta-skills set out in these qualifications.

The Overarching Assessment Strategy identifies sources of evidence of learner competence. In addition, for the assessment of these qualifications, suitable types of evidence sourcing have been identified. These are listed in section 4 of this assessment strategy.

There are no further requirements specific to these qualifications.

## 2.2 Occupational expertise and qualification requirements for those assessing or undertaking quality assurance of assessment

The requirements of assessors, internal verifiers and external verifiers are set out in section 2.2 of the Overarching Assessment Strategy for competence-based qualifications. There are no further requirements specific to these qualifications.

## 2.3 Holistic Assessment

Holistic approaches to assessment are encouraged to provide an integrated rather than fragmented approach to assessment as well as to reduce duplication and the overall assessment burden on the learner and assessor. A single assessment can be used to evidence several performance and knowledge requirements rather than the process of finding separate evidence for each performance requirement or assessment criteria.

It must be ensured that combining assessments does not make the assessment task more difficult for the leaner by creating higher levels of demand than would be required. The activities of a combined assessment should be included in an assessment plan and cross-referenced back to the criteria. This will help to ensure that all criteria of all the units have been achieved.

## 2.4 Simulation in a Realistic Working Environment (RWE)

Simulation guidance is set out in section 2.1.3 of the Overarching assessment strategy. Where simulation is permitted assessment must be conducted in a Realistic Working Environment, under conditions which replicate those of the workplace, and assessors must ensure that competence is fully transferable to the workplace.

The performance requirements set out in this qualification describe those aspects of the role which are routinely performed. Therefore, only minimal simulation for assessment purposes is permitted in these qualifications.

**3. Meta-Skills**

## 3.1 Guidance on meta-skills

A key aspect of these qualifications is that learners develop the range of Meta-skills as identified in the Overarching Assessment Strategy (section 3).

## 3.2 Unit Developing meta-skills and personal practice (USO434 and USO194)

In summary, the Meta-skills unit is integrated with the other units of the qualification rather than being viewed as a standalone unit. The associated performance requirements and knowledge and understanding requirements are generated through the other units and assessed through the performance management process.

Furthermore, assessment of the Meta-skills should focus on the nature and quality of the self-reflective practices and self-evaluation activities being undertaken, rather than the achievement of specific Meta-skills. However, supporting evidence that exemplifies the Meta-skills development referred to in the self-reflective and self-evaluation practices should be provided.

Section 3 of the Overarching Assessment Strategy provides guidance on the assessment of meta-skills to be used in conjunction with this assessment strategy appendix. The tools and approaches referred to in the Overarching Assessment Strategy are for guidance, therefore flexible approaches may be used to ensure assessment is relevant to individuals working in different organisations. Further information on Meta-skills, including how Meta-skills align to the units in this qualification can be requested from Skills Development Scotland at apprenticeshipdevelopment@sds.co.uk.

**4. Methods of assessment**

Learners are expected to demonstrate to the assessor that they have met the performance requirements and knowledge and understanding requirements of these qualifications and are competent in a relevant Customer Service, Retail or Travel role. Learners will provide evidence of their competence in the workplace, and this will be assessed by qualified and experienced staff within an awarding body approved centre.

A range of assessment methods have been identified during the design of the Customer Service, Retail and Travel qualifications at SCQF level 5 and SCQF Level 6. Learners are expected to provide evidence of meeting all the knowledge and understanding and performance requirements required to demonstrate that they are competent in their role. It is important for learners to recognise how they have developed skills and understanding along the way, and where these still need to be developed. The primary source of evidence for this qualification is observation and other assessment methods may be used to supplement this activity. The following methods have been identified as suitable for the Customer Service, Retail and Travel qualifications:

|  |  |  |  |
| --- | --- | --- | --- |
| **Assessment methods** | **Customer Service** | **Retail** | **Travel** |
| Observation | ✓ | ✓ | ✓ |
| Verbal questioning | ✓ | ✓ | ✓ |
| Evidence of prior achievement | ✓ | ✓ | ✓ |
| Multiple choice or short answer questions | ✓ | ✓ | ✓ |
| Personal statements and reflective accounts | ✓ | ✓ | ✓ |
| Product evidence  | ✓ | ✓ | ✓ |
| Presentations  | ✓ | ✓ | ✓ |
| Professional discussion  | ✓ | ✓ | ✓ |
| Witness testimonies  | ✓ | ✓ | ✓ |

Additionally, the following examples and qualification units have been identified for the assessment methods suitable for the Customer Service, Retail and Travel qualifications:

|  |  |
| --- | --- |
| **Assessment methods**  | **Examples and qualification units** |
| Observation | This can be used for assessing the performance of all units in these qualifications. While physical observation is ideal, virtual observation using electronic communication is acceptable where visits are difficult because of location or other reasons such as infrequent or seasonal activities. This relates to virtual visits by an assessor to assess a task being completed remotely rather than the physical observation on site. This does not relate to remote tests which is covered in the multiple choice or short answer question section below. |
| Questioning  | This can be used to support evidence of knowledge and understanding for all units within these qualifications. Verbal questioning is useful to confirm knowledge and understanding where it is not apparent from performance, draw out knowledge and understanding during an observation, address gaps in knowledge and understanding, and to authenticate evidence by asking learners to explain part of the evidence and/or describe the process of producing it. If carried out remotely using online methods in the form of a test or exam, then consideration should be given to the use of a remote invigilator for validation purposes. The Awarding Body should have guidance available for centres on remote assessment and invigilation. Questions could be online or paper based. |
| Evidence of prior achievement | Previous course/qualification assessment and certification should be made available. See more information on the Overarching Assessment Strategy for Competence-based Qualifications. |
| Personal statements and reflective accounts | This can be used as evidence of performance for all units in these qualifications. Evidence of a learner’s activities and progress e.g. in the form of a log or diary, or online blog or vlog created and kept up to date by the learner, can be of value and used to support other evidence. |
| Presentations | These are suitable for assessing the performance of some units in the SCQF level 6 qualification particularly where communication skills will be assessed at the same time. For example: * Contributing to developing individuals
* Leading meeting agenda items
 |
| Product evidence | Can be used for assessing performance where an end product is produced which can be assessed. For example:  * Receiving stock
* Replenishing stock
* Creating customer records
* Maintaining customer records
* Setting up promotional displays
* Evaluating promotional displays
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| Professional discussion | Can be used to support evidence of knowledge and understanding requirements for all units in these qualifications. As a planned 2-way discussion between the assessor and learner, this is particularly useful for assessing more complex knowledge and filling in gaps and for situations that are more nuanced.  |
| Witness testimonies  | Can be used for all units in these qualifications to validate performance evidence provided by learner. It is particularly relevant in units relating to customer experience and service such as:* Provide customer centric service
* Providing customer focused information and advice
* Providing customer service

Witness testimonies can include those carried out by line managers, experts, peers and customers,See section 2.1 of Overarching Assessment Strategy regarding expert witness. |

It is recommended that learners undertaking Customer Service, Retail and Travel at SCQF Level 5 and Customer Service, Retail and Travel at SCQF Level 6 qualifications develop a portfolio of work to evidence their competence. The portfolio may contain a variety of different types of evidence collected over time. This approach will allow learners to collect evidence of achievement that is most appropriate to their job role and organisation as well as the qualification being undertaken. Learners may generate evidence towards a unit without undertaking a formal assessment task. Such naturally-occurring evidence may arise from their day–to-day learning and is perfectly acceptable but it must be clearly identified and recorded so that it also may go through the internal verification process.