

**Assessment Strategy**

**for**

**SVQs in Customer Service**

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**1. Introduction**

This Assessment Strategy provides the criteria SQA approved centres must meet for the assessment of SVQs in Customer Service.

This document is derived from the Approved Skills CFA Assessment Strategy for Competence Units (S/NVQ) in Business and Administration, Customer Service and Management and Leadership; and outlines the criteria in relation to:

* requirements of assessors and verifiers
* evidence
* employer direct model

In addition to the criteria outlined in this document, centres must meet the general requirements of SQA’s Quality Assurance Criteria**1**.

**2. Requirements of Assessors and Internal Verifiers**

**2.1 Assessors**

The primary responsibility of an assessor is to assess candidates’ performance in a range of tasks and to ensure the evidence submitted by the candidate meets the requirements of the assessment criteria.

It is important that an assessor can recognise occupational competence as specified by the national standard. Assessors therefore need to have a thorough understanding of assessment and quality assurance practices, as well as have in-depth technical understanding related to the qualifications for which they are assessing candidates.

To assess candidates undertaking an SVQ in Customer Service, assessors must:

* be occupationally competent. Assessors must provide current evidence of competence, knowledge and understanding in the areas to be assessed. This must be demonstrated by relevant experience and continuing professional development (CPD) which may include the achievement of qualification(s) at a commensurate level, relevant to the areas being assessed.
* hold, or be working towards, an appropriate qualification as specified by the appropriate regulatory authority, confirming their competence to assess candidates undertaking competence-based units and qualifications. Assessors holding older qualifications must be able to demonstrate that they are assessing to the current standards through up to date CPD.

**Assessors working towards an appropriate qualification** must be supported by a qualified assessor throughout the period of completing the qualification. This support may be provided by a qualified assessor and/or qualified internal verifier. This must include monitoring of assessment decisions which may be achieved via the process of internal verification and/or sampling of assessment decisions by a qualified assessor. Evidence of the support provided and monitoring of assessment decisions must be recorded and made available to SQA on request.

**2.2 Internal Verifiers**

The primary responsibility of Internal Verifiers is to assure the quality and consistency of assessments by assessors. Internal Verifiers therefore need to have a thorough understanding of quality assurance and assessment practices, as well as sufficient technical understanding of the qualifications that they are internally verifying.

To internally verify SVQ Customer Service assessment decisions, Internal Verifiers must:

* be occupationally competent. Internal Verifiers must demonstrate sufficient and current understanding of the qualifications to be internally verified, and know how they are applied in business. This must be demonstrated by relevant experience and CPD which may include the achievement of qualification(s) at a commensurate level, relevant to the areas being assessed.
* hold, or be working towards, an appropriate qualification as specified by the appropriate regulatory authority, confirming their competence to internally verify assessment of competence-based units and qualifications. Internal verifiers holding older qualifications must be able to demonstrate that they are assessing to the current standards through up to date CPD.

**Internal Verifiers working towards an appropriate qualification** must be supported by a qualified Internal Verifier throughout the period of completing the qualification. This must include monitoring of verification decisions which may be achieved by sampling of reports and evidence by a qualified Internal Verifier. Evidence of the support provided and monitoring of verification decisions must be recorded and made available to SQA on request.

**2.3 Continuing Professional Development (CPD) Records**

The Assessment Strategy requires all Assessors and Internal Verifiers to maintain current competence in Customer Service and quality assurance and assessment practices to deliver these functions. SQA recognises this can be achieved in many ways. However, such information must be formally recorded in individual CPD records that are maintained in centres and available to SQA on request.

**3. Evidence**

**3.1 Evidence from Workplace Performance**

* Evidence of occupational competence for all SVQ Customer Service Units at all levels must be generated and collected through performance in the workplace.
* Performance Evidence must be produced for all Performance Indicators in all units. Simulation and/or Supporting Evidence may be used by exception to fill small gaps where Performance Evidence does not occur naturally but the unit is part of the candidate’s normal work duties. The use of Simulation and/or Supporting Evidence for Performance must be restricted to a small part of any unit.

**3.2** **Simulation**

Simulation must be carried out in a Realistic Working Environment (RWE). The criteria for RWEs are listed in Appendix A.

**4. Employer Direct Model**

The Employer Direct Model is available only to centres who are employers assessing their own staff within the workplace.

The Employer Direct Model is where colleagues, supervisors and/or managers in the workplace are involved in the assessment process.

Under this model, the employer, subject to the agreement of SQA, may choose between:

* Achieving the appropriate regulatory body approved unit qualifications for assessment;

**or**

* Demonstrating that the employer’s training and development activity undertaken to prepare, validate and review these assessment roles, maps 100% to the National Occupational Standards of the appropriate regulatory body approved unit qualifications for assessment. The mapping must be agreed by SQA as providing the equivalent level of rigour and robustness as achievement of the unit qualification.

In order to use the Employer Direct Model:

**A centre must:**

* Be an employer assessing their own staff

**and**

Seek approval from SQA to demonstrate that:

* appropriate processes are in place to facilitate assessment and verification functions
* the assessment and verification skills and knowledge of the trainer, supervisor or managers involved are mapped 100% to the National Occupational Standards of the appropriate regulatory body approved unit qualifications for assessment.
* this mapping provides the equivalent level of rigour and quality as achievement of the appropriate regulatory body approved unit qualifications for assessment.

**5. Appendix A**: **Realistic Working Environment Criteria**

It is essential that assessment undertaken in a RWE reflects a real work setting. This is to ensure that any competence achieved in this way will be sustained in employment.

To undertake assessment in a RWE the following criteria must be met:

1. Candidates must be given workplace responsibilities to enable them to meet the requirements of the relevant Performance Indicators within the unit(s)

2. The RWE is managed as a real work situation (e.g. tasks allocated and completed in an office environment with colleagues and distractions present)

3. Assessment must be carried out under realistic business pressures (e.g. dealing with competing priorities and demands on time and attention)

4. All services/tasks that are carried out should be completed in a way, and to a timescale, that is acceptable in business organisations

5. Candidates must be expected to achieve a volume of work comparable to normal business practices

6. The range of services, products, tools, materials and equipment that the candidates use must be up to date and commonly available in business organisations

7. Account must be taken of any legislation or regulations in relation to the type of work that is being carried out

8. Customer perceptions of the RWE is similar to that found in the work situation being represented

9. Candidates must show that their productivity reflects a level commensurate with the work situation being simulated.

**6. References**

**1** *Systems and Approval Guide (SQA) Pub code:*  AA7091

<http://www.sqa.org.uk/files_ccc/Systems_and_Qualification_Approval_Guide.pdf>