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Letter to Candidate,
and
Assessment Plan

DATE: _____

NAME AND ADDRESS:

Dear _____

ASSESSMENT:

I hereby confirm your forthcoming assessment on the outcomes of the following registered unit standard:

***Displaying and Marking Merchandise
NQF Level 2
8 Credits***

The assessment will take place on:

- Date:** As per rollout plan
Time: As per rollout plan
Venue: As per rollout plan
Language: English, except if requested in another language
Special Needs: None, except if made known

Assessment Methods to be utilised

1. Knowledge test
2. Portfolio of Evidence

Assessment Criteria to be used:

- Describe organisational procedures for arranging merchandise on display units in retail/wholesale outlets
- Describe housekeeping procedures for maintaining merchandise displays
- Demonstrate techniques for arranging merchandise on display units in an attractive and accessible manner
- Demonstrate techniques for marking prices on merchandise and display units

You will need to prepare yourself in the following ways

- Ensure you understand the “technical” language commonly used in retail
- Obtain permission for your merchandise display to be observed by the assessor
- Arrange the logistics around the display
- Prepare all materials and equipment used in the display to be built
- Ensure you understand terms and concepts around displaying merchandise
- Prepare all equipment and aids needed in the product evaluation

You will need to bring the following items with you

- All material and equipment, necessary tools needed to build the display
- Permission from your supervisor to for the product evaluation
- All materials needed for the display

You are invited to provide me with any extra evidence to support your competencies, such as your CV, letters of recommendation from your supervisor or any other evidence that will support your competence.

You are expected to be prompt. Should you not be clear as to what is expected from you, you may ask questions during the assessment. I will assess you as the candidate, however you may bring along a third party to observe the assessment process should you wish. The observer will have no responsibilities relating to the assessment process and may not take part in the assessment.

There will be a process of moderation to ensure that the assessment was fair, valid and reliable.

If you are found “not yet competent” you may appeal to the internal moderator. This must be based on one or more of the following:

- Unfair assessments
- Invalid assessments
- Unreliable assessments
- The assessor’s judgement, if considered biased
- Inadequate expertise and experience of the assessor if it influenced the assessment
- Unethical practices

Every candidate will be allowed two re-assessments after initial assessment, if declared “not yet competent”.

If you have any questions relating to the above, please do not hesitate to contact me on telephone number: _____.

Yours sincerely

ASSESSOR : NAME

ASSESSOR: SIGNATURE

NAME OF LEAD PROVIDER: _____

Assessment plan

(Learner to please sign and include in Portfolio of Evidence under Indirect Evidence)

DATE:	
TIME:	
ASSESSOR:	
CANDIDATE:	
ID NUMBER:	
ADDRESS:	
TELEPHONE NUMBER:	
FAX NUMBER:	
E-MAIL:	
OCCUPATIONAL QUALIFICATION (TO BE ASSESSED)	
UNIT STANDARDS (TO BE ASSESSED)	Displaying and marking merchandise (NQF 2)
EMPLOYMENT ORGANISATION	
DEPARTMENT	
CONTACT PERSON	
TELEPHONE NUMBER	
SPECIAL ARRANGEMENTS:	

ASSESSMENT AGREEMENT

We, the undersigned, agree that the above information is correct and that the said assessment/s will take place at the agreed time, date and place.

SIGNED:

ASSESSOR

CANDIDATE

Assessment plan

(Learner to please sign and include in Portfolio of Evidence under Indirect Evidence)

DATE:	
TIME:	
ASSESSOR:	
CANDIDATE:	
ID NUMBER:	
ADDRESS:	
TELEPHONE NUMBER:	
FAX NUMBER:	
E-MAIL:	
OCCUPATIONAL QUALIFICATION (TO BE ASSESSED)	
UNIT STANDARDS (TO BE ASSESSED)	Displaying and marking merchandise (NQF 2)
EMPLOYMENT ORGANISATION	
DEPARTMENT	
CONTACT PERSON	
TELEPHONE NUMBER	
SPECIAL ARRANGEMENTS:	

ASSESSMENT AGREEMENT

We, the undersigned, agree that the above information is correct and that the said assessment/s will take place at the agreed time, date and place.

SIGNED:

ASSESSOR

CANDIDATE

Assessment Plan

<u>Title:</u>	Displaying and marking merchandise
<u>Description:</u>	An assessment of the candidate's understanding of the principles of merchandising goods, the practices of displaying and marking goods and the way these are integrated to ensure customers' needs are met
<u>Outcomes:</u>	<p><i>Specific outcomes:</i></p> <p>The demonstrated ability to make decisions and consider options when:</p> <ul style="list-style-type: none"> • Displaying merchandise using a range of techniques for arranging merchandise on display units in retail/wholesale outlets • Marking merchandise using a range of techniques for indicating prices on merchandise and display units in retail/wholesale outlets • Performing a range of housekeeping activities for maintaining quantity, quality and presentation of merchandise displays in retail/wholesale outlets <p><i>Embedded knowledge:</i></p> <p>The demonstrated understanding of:</p> <ul style="list-style-type: none"> • Organisational procedures for arranging merchandise on display units in retail/wholesale outlets • Organisational housekeeping standards for maintaining merchandise displays • Packing and presentation techniques for arranging different categories of merchandise on display units • Techniques and equipment for marking prices on products and display units • Techniques for arranging merchandise on display units <p><i>Critical cross field outcomes:</i></p> <p>The ability to:</p> <ul style="list-style-type: none"> • Identify and solve problems when arranging merchandise displays so that display unit shelves are adjusted and packed to ensure accessibility of merchandise to customers while maintaining safety of customers moving around in the immediate vicinity • Work effectively with members of the community when delivering customer service so that the special needs of customers are attended to in a helpful and pleasant manner • Organise and manage oneself and ones activities when displaying different categories of merchandise so that sufficient thought is given as to how the displays can be arranged for customer accessibility • Organise and evaluate information when marking prices on products and display units so that correct prices are displayed for merchandise

<u>Assessment:</u>	The ability to produce the following types of evidence: <ul style="list-style-type: none"> • Describe organisational procedures for arranging merchandise on display units in retail/wholesale outlets • Describe housekeeping procedures for maintaining merchandise displays • Demonstrate techniques for arranging merchandise on display units in an attractive and accessible manner • Demonstrate techniques for marking prices on merchandise and display units
<u>Range:</u>	<ul style="list-style-type: none"> • Techniques for arranging merchandise including adjusting shelves, customer accessibility, displaying price tags, discount coupons, promotional signs, • Techniques for marking merchandise including bar coding, product labelling • Housekeeping activities including cleaning/dusting display areas, adjusting shelving, replenishing merchandise, checking for damaged merchandise
<u>Instruments:</u>	<ol style="list-style-type: none"> 1. Knowledge test 2. Portfolio of evidence
<u>Period of assessment:</u>	The knowledge test will take 40 minutes.
<u>Location:</u>	The knowledge test will take place and the portfolio of evidence needs to be submitted, as per the rollout plan.
<u>Credits:</u>	This assessment is worth 8 SAQA credits indicating a notional learning time of 80 hours.
<u>Steps of assessment</u>	<ol style="list-style-type: none"> 1. Knowledge test 2. Portfolio of evidence
<u>Level</u>	The level of merchandising skills is pegged at NQF 2, equivalent to grade 10 (std. 8) in the schooling system or second year apprentice in the technical training system.
<u>Results</u>	Results and feedback will be given within 14 days of assessment
<u>Policy and appeals:</u>	This assessment, including the recording of results and any possible appeal to these, is governed by _____ official assessment policy. Appeals should be dealt with according with _____ policies and procedures.

Appendix A

PLANNING ASSESSMENT

METHODS	Knowledge test	Portfolio of Evidence
PERIOD	As per rollout plan	As per rollout plan
PEOPLE	ASSESSOR	ASSESSOR
FACILITIES/ LOCATION	As per rollout plan	As per rollout plan
EQUIPMENT/ MATERIALS	Table, chair, black pen	Computer with necessary software, black pen

DISPLAYING AND MARKING MERCHANDISE NQF 2

INSTRUCTIONS TO LEARNER TO COMPILE A PORTFOLIO OF EVIDENCE

Specific Outcomes	Assessment Criteria	Type of Evidence Required
<p>Displaying merchandise using a range of techniques for arranging merchandise on display units in retail/wholesale outlets</p>	<ul style="list-style-type: none"> • Describe organisational procedures for arranging merchandise on display units in retail/wholesale outlets • Demonstrate techniques for arranging merchandise on display units in an attractive and accessible manner 	<ul style="list-style-type: none"> • Describe the company's policy on displaying merchandise. • A copy of merchandise manuals or specific merchandise instructions should be included. • How is the merchandising of one type of merchandise different to the next? • What different types of techniques are used <p><i>(All evidence must be authenticated and signed by Supervisor and Line Manager – full details of people authenticating evidence to be provided)</i></p>
<p>Marking merchandise using a range of techniques for indicating prices on merchandise and display units in retail/wholesale outlets</p>	<ul style="list-style-type: none"> • Demonstrate techniques for marking prices on merchandise and display units 	<ul style="list-style-type: none"> • A description or copy of the company's policy and procedure regarding the marking of merchandise. • Who is responsible for the marking of merchandise, is the merchandise marked in the store or is it marked before it reaches the store? • Where on the merchandise will customers find the prices? • To what parts of the merchandise should prices not be attached? • Show examples of price tickets/tags where possible <p><i>(All evidence must authenticated and signed by Supervisor and Line Manager – full details of</i></p>

		<i>people authenticating evidence to be provided)</i>
<p>Performing a range of housekeeping activities for maintaining quantity, quality and presentation of merchandise displays in retail/wholesale outlets</p>	<ul style="list-style-type: none"> • Describe housekeeping procedures for maintaining merchandise displays 	<ul style="list-style-type: none"> • A description or a copy of the company policy regarding housekeeping. • How do you ensure that there is enough merchandise available to the customer at all times? • How do you ensure that the display areas are neat and customer friendly at all times? • Who is responsible for housekeeping? • How are customer queries regarding prices attended to? <p><i>(All evidence must authenticated and signed by Supervisor and Line Manager – full details of people authenticating evidence to be provided)</i></p>

Candidate's Curriculum Vitae

Indirect Evidence

Indirect evidence is evidence produced about the learner from another source. This is usually in the form of reports of third party sources, i.e. sources other than the assessor. Indirect evidence can be used to verify the authenticity of other forms of evidence. In addition, it may be necessary to corroborate these forms of evidence. Sources of indirect evidence include:

- Team outputs
- Work completed at an earlier stage
- Performance appraisals
- Training records
- Testimonials
- Reviews and commendations
- Certificates and qualifications
- Medals, prizes and trophies
- Customer/client ratings

NB: Please include a copy of your Identity Document at the beginning of this section.

Relevant
Unit
Standard

Displaying and marking merchandise

Unit standard number	RW/C/DISP/2
Unit standard level	NQF 2
Credit value	8
Field	Services
Sub-field	Retail and Wholesale
Issue date	1 June 1999
Review date	31 May 2001

■ Purpose and relationship to qualification

- This unit is a core standard towards the qualification National Certificate in Retail/Wholesale Processes at NQF 2. Its purpose is to provide skills that will transform practices in the retail sector and to enable movement across the field.

■ Learning assumed to be in place

- Numeracy skills at the equivalent of ABET 4

■ Specific Outcomes

The demonstrated ability to make decisions and consider options when:

- Displaying merchandise using a range of techniques for arranging merchandise on display units in retail/wholesale outlets
- Marking merchandise using a range of techniques for indicating prices on merchandise and display units in retail/wholesale outlets
- Performing a range of housekeeping activities for maintaining quantity, quality and presentation of merchandise displays in retail/wholesale outlets

■ Assessment Criteria

The ability to produce all of the following types of evidence:

- Describe organisational procedures for arranging merchandise on display units in retail/wholesale outlets
- Describe housekeeping procedures for maintaining merchandise displays
- Demonstrate techniques for arranging merchandise on display units in an attractive and accessible manner
- Demonstrate techniques for marking prices on merchandise and display units

(The evidence must be judged by a registered retail assessor both in-store and at the training centre)

■ **Range Statement**

- Techniques for arranging merchandise including adjusting shelves, customer accessibility, displaying price tags, discount coupons, promotional signs,
- Techniques for marking merchandise including bar coding, product labelling
- Housekeeping activities including cleaning/dusting display areas, adjusting shelving, replenishing merchandise, checking for damaged merchandise

■ **Notes (1) : Embedded Knowledge**

The demonstrated understanding of:

- Organisational procedures for arranging merchandise on display units in retail/wholesale outlets
- Organisational housekeeping standards for maintaining merchandise displays
- Packing and presentation techniques for arranging different categories of merchandise on display units
- Techniques and equipment for marking prices on products and display units
- Techniques for arranging merchandise on display units

■ **Notes (1) : Critical Cross Field and Development Outcomes**

The ability to:

- Identify and solve problems when arranging merchandise displays so that display unit shelves are adjusted and packed to ensure accessibility of merchandise to customers while maintaining safety of customers moving around in the immediate vicinity
- Work effectively with members of the community when delivering customer service so that the special needs of customers are attended to in a helpful and pleasant manner
- Organise and manage oneself and ones activities when displaying different categories of merchandise so that sufficient thought is given as to how the displays can be arranged for customer accessibility
- Organise and evaluate information when marking prices on products and display units so that correct prices are displayed for merchandise

“Displaying and Marking Merchandise”

Evidence of Outcome 1

“Displaying merchandise using a range of techniques for arranging merchandise on display units in retail/wholesale outlets”

Your evidence must show:

1. Describe the company's policy on displaying merchandise.
2. A copy of merchandise manuals or specific merchandise instructions should be included.
3. How is the merchandising of one type of merchandise different to the next?
4. What different types of techniques are used

“Displaying and Marking Merchandise”

Evidence of Outcome 2

“Marking merchandise using a range of techniques for indicating prices on merchandise and display units in retail/wholesale outlets”

Your evidence must show:

1. A description or copy of the company's policy and procedure regarding the marking of merchandise.
2. Who is responsible for the marking of merchandise, is the merchandise marked in the store or is it marked before it reaches the store?
3. Where on the merchandise will customers find the prices?
4. To what parts of the merchandise should prices not be attached?
5. Show examples of price tickets/tags where possible

“Displaying and Marking Merchandise”

Evidence of Outcome 3

“Performing a range of housekeeping activities for maintaining quantity, quality and presentation of merchandise displays in retail/wholesale outlets”

Your evidence must show:

1. A description or a copy of the company policy regarding housekeeping.
2. How do you ensure that there is enough merchandise available to the customer at all times?
3. How do you ensure that the display areas are neat and customer friendly at all times?
4. Who is responsible for housekeeping?
5. How are customer queries regarding prices attended to?

Assessment Evaluation and Moderation Report

EVALUATION REPORT

UNIT STANDARD NAME: DISPLAYING AND MARKING MERCHANDISE
NUMBER: RW/C/DISP/2
UNIT STANDARD LEVEL: 2
CREDITS : 8
FIELD: SERVICES
SUB-FIELD: RETAIL AND WHOLESALE
ISSUE DATE: 1 JUNE 1999
REVIEW DATE: 31 MAY 2001

LEARNER'S FULL NAMES: _____

CONTACT NUMBER: _____

ASSESSOR'S NAME: _____

DATE OF ASSESSMENT: _____

ASSESSMENT METHODOLOGY: _____

LEARNER'S COMPANY: _____

LEARNER MODERATOR DEPT: _____

ID NUMBER OF LEARNER: _____

MODERATOR'S NAME: _____

DATE OF MODERATION: _____

ASSESSOR

MODERATOR

EVIDENCE OF LEARNING SHOULD BE IN PLACE (WHAT SHOULD THE CANDIDATE KNOW AND BE ABLE TO DO BEFORE STARTING THE UNIT STANDARD)

CRITERIA	ASSESSMENT RESULTS
Numeracy skills at the equivalent of ABET 4	

FEEDBACK: _____

RANGE STATEMENTS:

- Techniques for arranging merchandise including adjusting shelves, customer accessibility, displaying price tags, discount coupons, promotional signs,
- Techniques for marking merchandise including bar coding, product labelling
- Housekeeping activities including cleaning/dusting display areas, adjusting shelving, replenishing merchandise, checking for damaged merchandise

UNIT STANDARD:

	ASSESSMENT CRITERIA	COMPETENT
1	Displaying merchandise using a range of techniques for arranging merchandise on display units in retail/wholesale outlets <i>Evidence must show:</i>	
	1.1 Describe organisational procedures for arranging merchandise on display units in retail/wholesale outlets	
	1.2 Demonstrate techniques for arranging merchandise on display units in an attractive and accessible manner	
2	Marking merchandise using a range of techniques for indicating prices on merchandise and display units in retail/wholesale outlets <i>Evidence must show:</i>	
	2.1 Demonstrate techniques for marking prices on merchandise and display units	
3	Performing a range of housekeeping activities for maintaining quantity, quality and presentation of merchandise displays in retail/wholesale outlets <i>Evidence must show:</i>	
	3.1 Describe housekeeping procedures for maintaining merchandise displays	

FEEDBACK: _____

ASSESSOR

MODERATOR

SIGNATURE OF LEARNER: _____

ASSESSMENT OF THE ABILITY TO USE RELEVANT CRITICAL CROSS-FIELD OUTCOMES

	ASSESSMENT CRITERIA	COMPETENT
1	Identify and solve problems when arranging merchandise displays so that display unit shelves are adjusted and packed to ensure accessibility of merchandise to customers while maintaining safety of customers moving around in the immediate vicinity	
2	Work effectively with members of the community when delivering customer service so that the special needs of customers are attended to in a helpful and pleasant manner	
3	Organise and manage oneself and ones activities when displaying different categories of merchandise so that sufficient thought is given as to how the displays can be arranged for customer accessibility	
4	Organise and evaluate information when marking prices on products and display units so that correct prices are displayed for merchandise	

FEEDBACK: _____

EVIDENCE OF ESSENTIAL EMBEDDED KNOWLEDGE

KNOWLEDGE COMPONENT	EVIDENT IN SUBMISSION
Organisational procedures for arranging merchandise on display units in retail/wholesale outlets	
Organisational housekeeping standards for maintaining merchandise displays	
Packing and presentation techniques for arranging different categories of merchandise on display units	
Techniques and equipment for marking prices on products and display units	
Techniques for arranging merchandise on display units	

FEEDBACK: _____

ASSESSOR

MODERATOR

SIGNATURE OF LEARNER: _____

SUPPLEMENTARY INFORMATION

Was the assessment conducted true to all the principles of assessment stated before?

1.	Appropriate	The method of assessment is suited to the performance being assessed.
2.	Fair	The method of assessment does not present any barriers to achievements related to the evidence.
3.	Manageable	The methods used make for easily arranged, cost effective assessments.
4.	Integrated	Evidence collection is integrated into the work or learning process where this is appropriate and feasible.
5.	Valid	The assessment focuses on the requirements laid down in the Standard i.e. is fit for purpose.
6.	Direct	The activities in the assessment mirror the conditions of actual performance as closely as possible.
7.	Authentic	The assessor is satisfied that the work being assessed is attributable to the person being assessed.
8.	Sufficient	The evidence establishes that all criteria are met and that performance can be repeated consistently
9.	Systematic	Planning and recording is sufficiently rigorous to ensure that assessment is fair.
10.	Open	Learners can contribute to the planning and accumulation of evidence. Assessment candidates understand the assessment process and the criteria that is applicable.
11.	Consistent	The same assessor would make the same judgment again in similar circumstances. The judgment made is similar to the judgment that would be made by other assessors.

If no, state how the neglected principle can be achieved in future.

ASSESSOR

MODERATOR

SIGNATURE OF LEARNER: _____

