

BTEC Short Courses

SBA – CENTRE GUIDANCE

Edexcel Level 3 BTEC Award

Customer Service

Unit 3: Customer Service Administration

Issued June 2004

For use during the remainder of the duration of operation
of the specification issued for September 2003



CONTENTS

General information relevant to Scenario Based Assessments (SBAs)	1
Specific guidance for this SBA	7
Appendix 1: Centre SBA Issue Sheet	
Appendix 2: SBA Cover Sheet	

DEFINITIONS AND KEY TERMS

The Scenario Based Assessment (SBA) is an assessment provided by Edexcel that covers the whole of either one or two units as set out in the unit specification for the programme. It provides a standard set of tasks ensuring that all learners nationally are being benchmarked identically, thus exemplifying the standards required throughout all the remaining units pertaining to a qualification.

The SBA is assessed by centres using the published unit assessment criteria.

Centre assessment is sampled by an external verifier (EV) appointed by Edexcel and the EV either confirms that assessment has been carried out to national standards or requires remedial action by the centre prior to the grades being reported.

SBA's may be taken at any time during the learner's programme when it is appropriate. Sampling by the EV may take place at any time agreed with the EV, provided that a full sample of completed and fully assessed SBA's is available.

KEY DATES

1 November **Closing date for registering learners on to BTEC programmes where the programme started since previous 1 September.**

Where a programme begins at any other time of the year learners must be registered within 4 weeks of starting the programme.

1 January **External sampling window for EV commences.**

31 May **Final deadline for EV to report on SBA sampling.**

** Centres that fail to meet the deadlines for learner registration, or SBA sampling may delay the issue of certification for learners completing at the end of the summer term.

If a programme is running within a non-standard delivery period, centres should refer to the Information Manual and may contact the BTEC Assessment Team by email at: bteccassess@edexcel.org.uk for further guidance.

GUIDANCE FOR SUPPORTING LEARNERS, ASSESSING SBAs AND REPORTING ACHIEVEMENT

Requirements

Edexcel requires that centres comply with the following, that:

- each learner has been taught the content of the unit(s) to which the SBA relates.
- each learner has their own copy of the SBA Learner Instructions with a completed Centre SBA Issue Sheet, giving information on key dates, resources, support, etc. Centres may use the sheet provided in Appendix 1 or use their own.

- contact is maintained with the learner during the SBA period so that assessors are able to sign the declaration that learner's work is genuinely their own on the SBA Cover Sheet. Centres must use the form provided in Appendix 2.
- it is not acceptable to provide model answers, to accept work from a group as that of each individual within the group, to mass-produce information in any form that is then presented by learners as their own evidence for a SBA task.
- all learner work is assessed and internally standardised.
- appropriate arrangements are made by the centre for sampling of learner work by the EV and for undertaking any remedial action required.

Centres that intend to run programmes over non-standard periods should contact the BTEC Assessment Team by e-mail to: btecassess@edexcel.org.uk within 4 weeks of commencement of the programme to agree arrangements for EV sampling.

Delivery period

The organisation of the SBA period is left to the centre's discretion. The centre should set its own internal deadlines for both formative and summative review of learner work and should ensure that this is consistent with arrangements for EV sampling.

Provided that the centre is ready to present all the marked learner work to the EV by the agreed date, the number of weeks and the amount of time devoted to the SBA is not fixed.

Registrations

All learners must be registered with Edexcel on the correct programme before taking the SBA.

Centres should consider whether any learners require a transfer between programmes, eg from Certificate to Award or an amended completion date, and notify the BTEC Registration and Certification Section.

Introducing the SBA to the learners

As part of the set-up phase:

- centres should provide learners with copies of the SBA Learner Instructions and the Centre SBA Issue Sheet.
- centre staff may wish to structure the use of available resources or to plan for the delivery of practical activities.

Review and support

Centre staff may give support and guidance to their learners as they would during the conduct of any internally set assignment. This may include commenting on draft work by learners so that the final work presented is as complete as possible. Centres may wish to set a formal date for draft work to be submitted for review or to have other formalised review activities.

The focus of the review and support should be to check that learners understand what is expected of them and complete all tasks fully.

Use of Observation Records and Witness Statements

Observation Records should be used to provide a formal record of an assessor's judgement of learner performance when required. The assessor must complete the Observation Record, sign and date it before submission as part of the SBA evidence.

A Witness Statement should be used to provide a record of Learner performance against criteria when required. Assessors must actively take steps to ensure that any Witness Statement submitted as part of the SBA evidence is authentic.

Assessing the SBA

Centres may use any number of assessors for the SBAs. The centre must internally standardise, through assessing an initial sample, prior to final assessment of all learner work. Please refer to the `Handbook for NQF BTEC Qualifications Levels 1 – 3' for information on the conduct of standardisation. It is the centre's responsibility to standardise across sites where there are different cohorts on a number of sites.

When assessing a learner's work, the script should be annotated to show where criteria have been achieved or have not been achieved. It is advisable to provide detailed written feedback to learners separately. If learners re-submit work or provide additional work after formative assessment, this may require further annotation.

Prior to the centre's deadline for final assessment, assessors should provide formative assessment and feedback to learners. This should show which criteria have been achieved and which are still to be achieved. The centre should stipulate what further evidence would be considered. It is important that centre standardisation takes place during this process to ensure that the feedback given to learners is valid. Evidence of standardisation must be supplied to the EV.

Summative assessment takes place internally once the centre's final deadline is reached.

Sampling the SBA

The centre must make a sample of work available to the EV that is completed, assessed according to the centre's standardised interpretation of the criteria, and submitted with the centre's grade reporting sheet(s) for each learner and the overall record of standardisation.

The sample must be of a range of learners. Full details of sample size and sample selection will be provided. The EV may request further samples if necessary. The EV will give either a Yes or No to certification on the basis of the sample.

Centres will be required to take remedial action and submit a further sample where a No is given. Certification will be delayed until remedial action has been effected.

Reporting achievement

Once the EV has assessed a sample and agreed that the SBA has been delivered to national standards, the centre may submit grades on SRFs to Edexcel. This should be not later than 30 June for August certification.

Frequently Asked Questions

Q	<i>How much can assessors help learners?</i>
A	Generally, assessors should guide learners in the same way and to the same extent as if the SBA were an assessment that had been internally set. The work provided by the learners should be their own and should accurately demonstrate their level of achievement.
Q	<i>What if I am not sure about the meaning of some of the assessment criteria?</i>
A	The terminology used in assessment criteria is generally explained in the detailed content of the unit. Where terms such as "analyse" or "evaluate" are used, then the specific context may be given in the SBA.
Q	<i>Can I modify a task to make it more appropriate for my learners?</i>
A	The tasks set must not be changed.
Q	<i>Can a centre make braille and /or large print copies of the SBA?</i>
A	Yes. For learners with special requirements, centres may provide the SBA to learners in an amended format, such as in Braille or in large print. Centres should refer to the guidance document on 'Special Requirements for Learners on BTEC Programmes'.
Q	<i>What happens if a learner does not submit an SBA?</i>
A	The learner cannot gain the qualification until an SBA has been submitted.

GUIDANCE FOR THIS ASSESSMENT

Although the SBA is set in a specific scenario, centres may vary this, if an alternative would be more relevant to their learners. Any business reference in the tasks may be changed to the new business, but the actual tasks must be used.

Centres may make use of appropriate organisations within the local area to which they have access and which learners can investigate to obtain research material to complete the assignment tasks, or use a case study/scenario in which information can be supplied that learners can use.

For Task 3, it would be helpful for tutors to provide examples of codes of practice in different workplaces, but learners should obtain two more for Task 3b). If the centre is following the SBA scenario, using the department store environment and there is only one department store in the local area, it is acceptable for tutors to obtain a copy of the department store's code of practice on behalf of the whole cohort of learners. This can then be used by the learners, together with the learners' own two versions obtained, to complete Task 3c).

Task 4 will require tutors to prepare observation sheets to record each learner's performance during the presentations. These should be attached to the learner's hard copies of all materials used in the preparation and the actual presentation when the SBA is submitted for assessment. An example is attached but centres may provide their own.

SBA ACHIEVEMENT TRACKING SHEET

Level 3 BTEC Award Customer Service

CENTRE NAME	
LEARNER NAME	
PROGRAMME TITLE	

To gain a Pass, all Pass criteria must be achieved.

To gain Merit, all Pass and all Merit criteria must be achieved.

To gain a Distinction, all Pass, all Merit and all Distinction criteria must be achieved.

UNIT 1: Customer Service Administration

Criteria	Met	Date	Criteria	Met	Date	Criteria	Met	Date
P1			M1			D1		
P2			M2			D2		
P3			M3					
P4								

ACHIEVEMENT FOR UNIT					
PASS		MERIT		DISTINCTION	

The final grade awarded should be reported on the learner's SRF after the External Verifier has assessed a sample and agreed that the SBA has been delivered to National Standards.

RECORDING DOCUMENT FOR TASK 4a): Presentation on legislation and regulations, the working environment and codes of practice required for the provision of excellent customer service.

Centre No:	Centre Name:
Learner Reg No:	Learner Name:

Areas covered	Analysis included	Implications for Customer provision	Additional Tutor comments
Legislation and Regulations			
The working environment			
Codes of practice			
Overall Analysis			

Tutor's Name:	D1 met: Yes/No
Signed:	Preparation materials attached: Yes/No
Date:	Presentation materials attached: Yes/No
Internal Verifier:	
Signed:	Date:

CENTRE SBA ISSUE SHEET

to be completed by the centre

Edexcel Level 3 BTEC Award CUSTOMER SERVICE SCENARIO BASED ASSESSMENT

Centre Name		
Centre Number		
Learner Name		
Learner Registration Number		
Start date	Initial briefing	Review Date
All completed work must be handed in by		

***If you do not complete your assessment by the given date you will not be assessed.
If you are experiencing problems you should contact your course tutors immediately.***

SPECIFIC INFORMATION ON THE COMPLETION OF THIS ASSESSMENT (e.g. resource availability, research opportunities, dates or events/practicals)

SBA COVER SHEET

to be completed by the learner

Edexcel Level 3 BTEC Award CUSTOMER SERVICE SCENARIO BASED ASSESSMENT

Centre Name _____ Centre No. _____

Learner Name _____ Learner Reg. No. _____

- Label all your work and use page numbers or references to identify all components
- Sign the declaration of authenticity.

Learner's Declaration		
I certify that the work submitted for this Scenario Based Assessment is my own.		
Signed:		Date:
Assessor's Declaration		
I certify that the work submitted by the learner named above is original and has been completed independently.		
Name of Assessor:	Signed:	Date: