Highfield Level 2 End-Point Assessment for ST0269 Hire Controller (Plant, Tools and Equipment)

End-Point Assessment Kit

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EPA Kit

Contents

Please click on the headings below to navigate to the associated section of the EPA Kit.

Introduction 4

The Highfield approach 8

Gateway 9

The Hire Controller (Plant, Tools and Equipment) apprenticeship standard 11

Assessment summary 43

Assessing the multiple-choice test 46

Assessing the interview underpinned by a portfolio of evidence 48

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How to use this EPA Kit

Welcome to the Highfield End-Point Assessment Kit for the Hire Controller (Plant, Tools and Equipment) apprenticeship standard.

Highfield is an end-point assessment organisation that has been approved to offer and carry out end-point assessments for the Level 2 Hire Controller (Plant, Tools and Equipment) apprenticeship standard.

The EPA Kit is designed to outline all you need to know about the end-point assessments for this standard and will also provide an overview of the on-programme delivery requirements. In addition, advice and guidance for trainers on how to prepare apprentices for the end-point assessment is included. The approaches suggested are not the only way in which an apprentice may be prepared for their assessments, but trainers may find them helpful.

In this kit, you will find:

- an overview of the standard and any on-programme requirements
- a section focused on amplification
- guidance on how to prepare the apprentice for gateway
- detailed information on which part of the standard is assessed by which assessment method
- suggestions on how to prepare the apprentice for each part of the end-point assessment
- a section focused on the end-point assessment method where the assessment criteria are presented in a format suitable for carrying out 'mock' assessments

Introduction

Standard overview

A hire controller works in the construction sector and across industries such as mechanical, electrical, facilities management and civil engineering. They play a key role in providing plant, tools and equipment (PTE) to both commercial and domestic customers on short or long-term hire.

Key responsibilities are likely to include advising customers on the most appropriate tools or machinery for specific tasks, providing technical product knowledge, ensuring equipment meets legal, health, safety and environmental standards, and managing stock levels. They act as a main point of contact for customers and work closely with teams including managers, supervisors, maintenance and delivery staff. They may deal with products ranging from simple hand tools to large machinery like tower cranes.

On-programme requirements

Although learning, development and on-programme assessment is flexible, and the process is not prescribed, the following is the recommended baseline expectation for an apprentice to achieve full competence in line with the Hire Controller (Plant, Tools and Equipment) apprenticeship standard.

The on-programme assessment approach will be agreed between the training provider and employer. The assessment will give an ongoing indication of an apprentice's performance against the final outcomes defined in the standard. The training provider will need to prepare the apprentice for the end-point assessment, including preparation for the interview and collation of the portfolio of evidence (such as a provision of recordings of professional discussions or workplace evidence).

The training programme leading to end-point assessment should cover the breadth and depth of the standard using suggested on-programme assessment methods that integrate the knowledge, skills and behaviour components, and which ensure that the apprentice is sufficiently prepared to undertake the end-point assessment. Training, development and ongoing review activities should include:

- achievement of level 1 English and maths. If the apprentice began their apprenticeship training before their 19th birthday, they will still be subject to the mandatory requirement to study towards and achieve English and maths. The requirements for English and maths are optional for apprentices aged 19+ at the start of their apprenticeship training.
- completion of a portfolio through which the apprentice gathers evidence of their progress.

Portfolio of evidence

The apprentice must compile a portfolio of evidence during their time on-programme that is mapped against the knowledge, skills and behaviours assessed in the interview underpinned by a portfolio of evidence.

It will typically contain **10 discrete pieces of evidence.** Evidence may be used to demonstrate more than **1 knowledge, skill or behaviour** as a qualitative approach is suggested as opposed to a quantitative approach.

Evidence sources may include:

- workplace documentation and records
- workplace policies and procedures
- witness statements
- annotated photographs
- video clips with a maximum total duration of 10 minutes, where the apprentice must be in view and identifiable

This is not a definitive list and other evidence sources can be included.

The portfolio of evidence should not include reflective accounts or any methods of self-assessment. Any employer contributions should focus on direct observation of performance, for example, witness statements, rather than opinions.

The portfolio must be accompanied by a **Portfolio Matrix.** This can be downloaded from our website. The Portfolio Matrix must be fully completed including a declaration by the employer and the apprentice to confirm that the portfolio is valid and attributable to the apprentice.

The portfolio of evidence must be submitted to Highfield at gateway. It is not directly assessed but underpins the interview.

Use of artificial intelligence (AI) in the EPA

Assessments must be carried out in accordance with the published assessment plan and all work submitted must be the apprentice's own. AI tools must not be used to generate evidence in its entirety or to replace the apprentice's own judgement, performance or competence. Any use of AI must be transparent, limited and properly referenced.

Where AI has been used by the apprentice as part of normal work activity (for example, drafting a document, worksheet or PowerPoint) this may form part of the portfolio provided that:

The apprentice has materially authored, verified and taken responsibility for the content:

- AI use is clearly declared and referenced within the work (include tool name, purpose and how outputs were verified)

- Source prompts, system settings and the portions influenced by AI are retained and available for review
- AI outputs must not substitute for authentic demonstration of competence against the standard

If an AI tool is used at any stage of an assessment method (for example, to prepare a presentation outline or to organise notes), its use must be fully referenced in the submission or assessor records, and must not compromise authenticity, validity or security. Assessors must be satisfied that decisions remain rooted in the apprentice's knowledge, skills and behaviours, and in direct evidence gathered through observation, questioning and professional discussion.

AI tools must not be used to produce assessment evidence end-to-end, to fabricate logs/records or to simulate performance.

Readiness for end-point assessment

For an apprentice to be ready for the end-point assessments:

- the apprentice must have achieved level 1 English and maths. The requirements for English and maths are mandatory for all apprentices aged between 16-18 at the start of their apprenticeship training. The requirements for English and maths are optional for apprentices aged 19+ at the start of their apprenticeship training.
- the apprentice must have gathered a **portfolio of evidence** against the required elements to be put forward to be used as the basis for the interview.
- the apprentice must have gathered their organisation's policies and procedures as requested by Highfield. For guidance, a list of examples has been provided below.
    - Logging maintenance or servicing requirements
    - Conducting pre and post hire checks/operational testing
    - Preventing fraudulent hire
    - Complying with environmental and sustainability principles
    - Supporting equity, diversity and inclusion

  This list is not definitive. The policies and procedures may already be included as part of the portfolio of evidence.
- the line manager (employer) must be confident that the apprentice has developed all the knowledge, skills and behaviours defined in the apprenticeship standard and that the apprentice is competent in performing their role. To ensure this, the apprentice must attend a formal meeting with their employer to complete the Gateway Readiness Report.
- the apprentice and the employer should then engage with Highfield to agree a plan and schedule for each assessment activity to ensure all components can be completed within a mandated end-assessment window. Further information about the gateway process is covered later in this kit.

If you have any queries regarding the gateway requirements, please contact your EPA customer engagement manager at Highfield Assessment.

Order of end-point assessments

There is no stipulated order of assessment methods. This will be discussed with the apprentice, training provider and/or employer with our scheduling team when scheduling the assessments to ensure that the learner is provided with the best opportunity to attempt the assessment.

Click here to return to contents

The Highfield approach

This section describes the approach Highfield has adopted in the development of this end-point assessment in terms of its interpretation of the requirements of the end-point assessment plan and other relevant documents.

Specific considerations

Highfield's approach does not deviate from the assessment plan.

Click here to return to contents

Gateway

How to prepare for gateway

After apprentices have completed their on-programme learning, they should be ready to pass through 'gateway' to their end-point assessment.

Gateway is a meeting that should be arranged between the apprentice, their employer and training provider to determine that the apprentice is ready to undertake their end-point assessment. The apprentice should prepare for this meeting by bringing along work-based evidence, including:

- customer feedback
- recordings
- manager statements
- witness statements

As well as evidence from others, such as:

- mid and end-of-year performance reviews
- feedback to show how they have met the apprenticeship standards while on-programme

In advance of gateway, apprentices will need to have completed the following. The requirements for English and maths listed below are mandatory for all apprentices aged between 16-18 at the start of their apprenticeship training. The requirements for English and maths listed below are optional for apprentices aged 19+ at the start of their apprenticeship training.

- Achieved level 1 English
- Achieved level 1 maths
- Submitted a suitable portfolio of evidence to be used as the basis for the interview (see the Portfolio Matrix)
- Submitted their organisation's policies and procedures as requested by Highfield

Therefore, apprentices should be advised by employers and providers to gather this evidence and undertake these qualifications during their on-programme training. It is recommended that employers and providers complete regular checks and reviews of this evidence to ensure the apprentice is progressing and achieving the standards before the formal gateway meeting is arranged.

The gateway meeting

The gateway meeting should be attended by the apprentice and a representative from the employer and training provider.

The **Gateway Readiness Report** should be used to log the outcomes of the meeting and agreed by all 3 parties. This report is available to download from the Highfield Assessment website.

The report should then be submitted to Highfield. If you require any support completing the Gateway Readiness Report, please contact your EPA customer engagement manager at Highfield Assessment.

Reasonable adjustments
Highfield Assessment has measures in place for apprentices who require additional support. Please refer to the Highfield Assessment Reasonable Adjustments policy for further information/guidance.

ID requirements
Highfield Assessment will complete an identification check before starting any assessment and will accept the following as proof of an apprentice's identity:

- a valid passport (any nationality)
- a signed UK photocard driving licence
- a valid warrant card issued by HM forces or the police
- another photographic ID card, such as an employee ID card or travel card

Click here to return to contents

The Hire Controller (Plant, Tools and Equipment) apprenticeship standard

Below are the knowledge, skills and behaviours (KSBs) from the standard and related assessment criteria from the assessment plan. On-programme learning will be based upon the KSBs and the associated assessment criteria are used to assess and grade the apprentice within each assessment method.

Multiple-choice test
Knowledge
K1 Awareness of health and safety regulations, standards, and guidance and impact on role of the team and other construction trades. **Employer and employee responsibilities**. **Control of Substances Hazardous to Health (CoSHH)**. Fire safety. Health and Safety at Work Act. Asbestos awareness. Manual handling. Fire extinguishers. Safety signage. Display equipment regulations. Situational awareness. Slips, trips, and falls. Working in confined spaces. Working at height. Electrical safety, respiratory protective equipment (RPE), dust suppression. Reporting injuries, diseases and dangerous occurrences regulations (RIDDOR), **Provision and use of work equipment regulations (PUWER)**, **Lifting operations and lifting equipment regulations (LOLER**) Noise, Hand arm vibrations (HAVS) **K2** Awareness of environmental management systems and standards. **Environmental Protection Act**. Environmental signage and notices. Types of pollution and **environmental control measures**: noise, smells, spills, waste and disposal of hazardous waste. **Types of pollution**: Water, noise and air pollution **K3 Hire controller industry sectors**: construction, contractors, infrastructure, energy and utilities and events **K4 Types and purpose of plant, tools and equipment (PTE): operating methods**, function and application, **technical specifications** **K22 Certification requirements** required for moving and handling on site equipment
Amplification and guidance
• **Employer and employee responsibilities:**   ○ employer responsibilities:

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        - provide a safe workplace and comply with legal regulations
        - conduct risk assessments and implement control measures
        - supply appropriate personal protective equipment (PPE)
        - provide safety training and supervision
        - maintain equipment and ensure it meets safety standards
    - employee responsibilities:
        - follow health and safety policies and procedures
        - use PPE correctly and report any issues
        - report hazards and unsafe conditions to supervisors
        - follow site rules for working at height, manual handling and hazardous substances
        - cooperate with employers and attend safety training sessions

- **Control of Substances Hazardous to Health (CoSHH):**
    - a regulation that requires employers to control substances that could be harmful to workers' health. The goal is to prevent or reduce workers' exposure to hazardous substances by implementing safety measures.
    - key aspects of COSHH:
        - identify hazardous substances – chemicals, dust, fumes, gases and biological agents
        - risk assessment – evaluate potential health risks from exposure
        - control measures – implement precautions like ventilation, protective clothing, and safe handling procedures and storage
        - monitoring and health surveillance – regularly check exposure levels and workers' health
        - training and information – ensure employees understand the risks and know how to work safely
        - emergency procedures – plan for spills, leaks or accidental exposure

- **Provision and use of work equipment regulations (PUWER) -** requires that equipment provided for use at work is suitable for the intended use, safe for use, maintained in a safe condition and inspected to ensure it is correctly installed and does not subsequently deteriorate, in accordance with the manufacturer's guidelines.

- **Lifting operations and lifting equipment regulations (LOLER) -** designed to make lifting operations and the use of lifting equipment as safe as possible. The regulations apply to any lifting equipment used in the workplace.

- **Environmental Protection Act** - a UK law designed to regulate pollution, waste management and environmental protection. It sets out responsibilities for businesses, local authorities and individuals to prevent harm to the environment.

- **Environmental control measures:**
  - management and disposal of waste oils and chemicals
  - disposal of waste
  - not working near open watercourses or drains
  - following relevant regulations like COSHH

- **Types of pollution:**
  - air – this can include things like vehicle emissions and industrial smoke caused by chemicals
  - water – this can include oil spills, sewage and disposal of items in water courses
  - land – this can include things like excessive use of pesticides and industrial/mining activities
  - noise – this can include things such as construction work including drilling, traffic noise and loud music
  - light – this can be factors including excessive use of outdoor lighting, illuminated billboards and lighting from buildings
  - thermal – factors include deforestation and releasing hot water into natural rivers/lakes
  - radioactive – factors can include nuclear power plant leaks or explosions, or improper disposal of waste and mining of radioactive elements

- **Hire controller industry sectors:**
  - construction:
    - involves planning, designing, building and maintaining infrastructure and buildings.
    - plays a vital role in economic growth and includes various sectors, from residential housing to large-scale infrastructure projects.

- contractors:
  - can include a range of options and used to support all other sectors.
  - can also include sub-contractors that are brought in to assist on larger construction projects using their own specialised subject knowledge and expertise.
- infrastructure:
  - essential physical structures and facilities required for societies and economies to function.
  - includes transportation, utilities, communication systems and public services.
  - plant, tools and equipment (PTE) plays a crucial role in constructing, maintaining and improving infrastructure.
- energy and utilities:
  - utilities are essential services that supply energy, water and communication.
  - energy infrastructure refers to the systems and facilities required to generate, transmit and distribute energy. These include power plants, renewable energy systems and electrical grids.
- events:
  - concerts, festivals, sports matches, corporate gatherings or exhibitions - require PTE for setup, safety and efficient operations.
  - equipment ensures smooth execution, enhances safety and improves the overall experience for attendees.

- **Types and purpose of plant, tools and equipment (PTE):**
  - plant (heavy large-scale machinery used for heavy-duty tasks):
    - excavators – digging and earthmoving in construction and mining
    - bulldozers – pushing materials, clearing land and grading surfaces
    - cranes – lifting and moving heavy loads in construction and logistics
    - concrete mixers – mixing cement, sand and aggregates for construction
    - loaders (backhoes, skid steers) – loading materials into trucks and excavation work
    - compactors and rollers – soil and asphalt compaction for roads
  - tools (hand and power tools used for manual work, assembly and repairs):
    - hand tools – hammers, wrenches, screwdrivers, chisels and saws

        - power tools – drills, grinders, circular saws and impact drivers
        - welding equipment – arc welders, metal inert gas (MIG)/tungsten inert gas (TIG) welders for metal fabrication
    - non-mechanical equipment and supporting devices:
        - scaffolding and ladders – provides access to elevated work areas
        - generators – provide temporary power supply for tools and lighting
        - surveying equipment – GPS, theodolites and laser levels for accurate measurements

- **Operating methods** – each PTE has specific operating procedures such as:
    - manual operation – hand tools require skill and effort, such as hammers and screwdrivers
    - mechanical operation – power tools and machinery require electricity, hydraulics or fuel, such as drills and excavators
    - automated operation – some modern PTE use automation and robotics for precision tasks

- **Technical specifications** may include:
    - power source – diesel, electric, battery-operated, hydraulic
    - load capacity – maximum weight or volume it can handle, such as crane lifting capacity
    - speed and efficiency – operational speed, cycles per minute, fuel consumption
    - safety features – guards, emergency stop buttons, automatic shutoff
    - durability and weather resistance – protection against extreme temperatures and conditions

- **Certification requirements** depend on the type of work and machinery used - these can include:
    - Red Construction Plant Competence Scheme (CPCS) Trained Operator Card – For operators who have passed the CPCS technical test but need to complete the NVQ to get full certification.
    - Blue Construction Plant Competence Scheme (CPCS) Competent Operator Card – For operators who have completed the NVQ Level 2 and gained work experience.
    - NPORS (National Plant Operators Registration Scheme).
    - CSCS (Construction Skills Certification Scheme).

○ MPQC (Mineral Products Qualification Council). ○ IPAF (International Powered Access Federation) - some items of plant including access equipment, such as mobile elevating work platforms will require IPAF. The operator certificates should be received before hire is agreed. ○ Hired In Plant insurance - vital for any hire as this covers equipment for any damages, theft or loss while on site with a customer. This must be presented by every customer and regularly checked to make sure it is valid, has coverage for all hire values and within date. ○ There may also be site specific requirements for any visitors, including delivery drivers that may be delivering plant to the site.

Health and safety	
Skills	**Behaviours**
S1 Comply with health and safety regulations, standards, and guidance	**B1 Take personal responsibility for their own health and safety**
Interview underpinned by a portfolio of evidence	
Pass criteria	***Distinction criteria***
HS1 Explains how they **comply with health and safety regulations, standards and guidance** taking responsibility for their own health and safety in their role (S1, B1)	*No distinction criteria*
Amplification and guidance	
• **Comply with health and safety regulations, standards, and guidance:** ○ ensure that all equipment is inspected and maintained regularly. This could include checking machinery for defects, wear and tear, and ensuring that safety features are in good working condition. ○ before equipment is hired out, ensure that all safety information, including user manuals, warnings and instructions are provided to the client.	

- verify that the customer is either trained in using the equipment or that training is offered. This may include offering or recommending training sessions to ensure the user understands safety procedures, including how to safely set up and operate the machinery.
- conduct risk assessments for the specific equipment being hired. This would include assessing the environment in which the equipment will be used.
- ensure that documentation (such as risk assessment reports, safety certificates or inspection logs) accompanies the equipment hire.

- **Take personal responsibility for their own health and safety** by:
  - following all safety guidelines
  - wearing necessary protective gear
  - ensuring their workspace is organised and hazard-free
  - participating in regular safety training and staying updated on industry standards
  - promptly reporting any potential safety hazards in the workplace to the relevant authorities
  - ensuring that all tools and equipment are regularly inspected and maintained, reporting any faults or damages

Information, quotes and pricing

Knowledge	Skills
K9 Principles of **hire quotations** and **pricing structures** **K10 Methods of interpreting and extracting relevant information from schedules**, **drawings**, **machine operator's manuals** or **manufacturer's instructions and specifications**	**S4 Create and send hire quotations**, **contact customer** and **entering purchase orders** **S5 Source plant, tools and equipment** for customer requirements **S13** Interpret and extract information from, for example schedules and **drawings**, **machine's operator's manual** or manufacturer's instructions

Interview underpinned by a portfolio of evidence	
Pass criteria	***Distinction criteria***
IQ1 Explains how they use information extracted from for example, schedules, **drawings, machine operator's manuals** or **manufacturer's instructions and specifications** to complete tasks in line with organisational guidelines (K10, S13) **IQ2** Describes how they source plant, tools or equipment to meet customers' requirements, **create and send hire quotations** and enter purchase orders in line with organisational procedures (K9, S4, S5)	*No distinction criteria*
Amplification and guidance	

- **Hire quotations** - a quotation to the customer is a first step to give them access to the terms and conditions, and allows the customer to see cost implications before agreeing to hire.

- **Pricing structures** - some customers will have specific pricing structures. These may already be built into the hire software and as certain items are selected the customer's specific price will populate.

- **Methods of interpreting and extracting relevant information from schedules:**
  - identify the format - understand whether it is a Gantt chart, work schedule or maintenance plan
  - read the legend and key - locate abbreviations, symbols and colour-codes
  - follow the timeline - track the sequence of operations and deadlines
  - cross-reference tasks - ensure dependencies between different tasks are understood
  - highlight critical path - identify tasks that directly affect the completion timeline

- Methods of interpreting and extracting relevant information from **drawings** (Blueprints, Schematics, CAD Files):
  - understand drawing types - mechanical, electrical, structural or assembly drawings

- use the title block - provides drawing number, revision history and scale
- read symbols and legends - use reference tables to decode notations
- interpret dimensions and tolerances - ensure accuracy in manufacturing and assembly
- identify section views and details - cross-sections show hidden details
- compare multiple views - top, front, side and isometric views help with visualisation

- Methods of interpreting and extracting relevant information from **machine operator's manuals:**
  - start with the table of contents - locate relevant sections quickly
  - safety warnings and precautions - essential for safe operation
  - operating procedures - step-by-step instructions for setup and usage
  - troubleshooting guides - helps diagnose and fix issues
  - maintenance and servicing - regular checklists to keep the machine running efficiently
  - technical specifications - power requirements, torque settings and load capacities

- Methods of interpreting and extracting relevant information from **manufacturer's instructions and specifications:**
  - check material and performance specs - load ratings, strength and temperature resistance
  - installation guidelines - ensure compliance with manufacturer-recommended methods
  - compliance and certifications - verify standards and requirements
  - warranty and service details - understanding limitations and coverage
  - use diagrams and flowcharts - helps visualise procedures and workflows

- **Create and send hire quotations** – generate rental quotation based on customer requirements, calculate rates, confirm pricing and send the finalised quotation via email with terms and conditions for customer approval before finalising the rental agreement

- **Contact customer** – reach out to customers via phone or email to confirm rental details, answer enquiries, clarify terms and provide updates on order status or availability, ensuring clear communication

- **Entering purchase orders** - verify purchase order details from customers, confirm item availability, enter order information into the system and processes for approval and fulfilment, ensuring accurate order tracking

- **Source plant, tools and equipment:**
  - sourcing equipment:
    - review customer requirements
    - check inventory availability
    - contact suppliers for specific tools or machinery
    - secure the best options for customer needs based on availability and pricing
  - supplier co-ordination:
    - contact approved suppliers
    - obtain quotes for required plant or equipment
    - confirm delivery timelines
    - negotiate terms to ensure timely availability of the equipment for customer requirements
  - equipment availability:
    - check the internal inventory system
    - liaise with operations teams for resource allocation
    - place orders with vendors when specific items are unavailable to meet customer needs
  - requesting special equipment:
    - identify specialised equipment needed by customers
    - contact industry suppliers for rental or purchase options
    - ensure compliance with regulations
    - arrange logistics for timely delivery

Hire process, documentation and regulations		
Knowledge	**Skills**	**Behaviours**
K5 Principles of **contract hire terms** and conditions: **damage**, **damage waiver**, **loss and theft** **K6** Hire transaction processes: **contract documentation for on-hire** and **off-hire**, raising requisitions and equipment **K12 Methods of creating and closing orders for hire**: checking process, **record keeping for lost hires** **K13 Hire fleet data**: plant, tool and equipment, spare equipment, resources, personnel resources **K19** Tool and equipment pre and post hire **checks and operational testing**	**S3 Process new hires, damage waivers, orders, returns** and enter onto company system **S11 Comply with regulations and legislation relevant to their role** and business **S12** Carry out hire transaction processes for example, **contract documentation for on-hire** and **off-hire**, raising requisitions and equipment delivery **S15** Ensure tool and equipment pre and post hire **checks and operational testing** of equipment has been carried out	**B3 Take accountability and ownership** of their tasks and workload

Interview underpinned by a portfolio of evidence	
Pass criteria	***Distinction criteria***
HP1 Explains how they **process new hires**, **damage waivers**, **orders and returns** in line with regulatory and organisational contract hire terms and conditions, including recording the details on company systems (K5, S3, S11)	***HP4*** *Outlines the importance of pre and post hire checks and testing of tools and equipment and the impact on the business if not done in line with organisational procedures (K19, S15)*

HP2 Describes how tool and equipment pre and post hire **checks and operational testing** of equipment are carried out in line with organisational procedures (K19, S15) **HP3** Explains how they take ownership and remain accountable in their role for carrying out hire transaction processes, including creating and closing orders and using **hire fleet data** in line with organisational and regulatory requirements (K6, K12, K13, S12, B3)	

Amplification and guidance

- **Contract hire terms** generally include:
    - lease duration – the agreed period for hiring the equipment
    - payment terms – fixed rental fees and additional costs
    - maintenance and repairs – responsibilities for servicing and upkeep
    - return conditions – the state in which the equipment must be returned

- **Damage** is any physical harm or wear beyond normal use that affects functionality or appearance.
    - Types of damage:
        - minor wear and tear - expected depreciation over time, such as scratches and minor dents
        - major damage - structural failures, mechanical breakdowns or misuse-related defects
    - liability:
        - the hirer is usually responsible for repair costs unless covered by a maintenance clause
        - if damage results from negligence, additional charges may apply

- **Damage waiver** is an optional fee that limits or removes liability for repair costs due to accidental damage.
    - Coverage:
        - reduces the hirer's financial responsibility for repairs
        - covers accidental damage but not intentional misuse or negligence

        - usually excludes tire damage, windshield cracks and interior wear
    - Exclusions:
        - reckless operation or failure to follow usage guidelines
        - damage caused by unauthorised modifications or overloading

- **Loss and theft:**
    - responsibility:
        - the hirer must report theft or loss immediately
        - in most cases, the hirer is liable for full replacement costs unless covered by insurance
    - theft protection and insurance:
        - some contracts offer theft protection clauses reducing the financial burden on the hirer
        - the hirer may need to prove they took reasonable precautions, such as secured storage

- **Contract documentation for on-hire** (hiring equipment). Hire transaction processes will be company specific but may include:
    - before receiving the equipment, the hirer must complete certain paperwork, including:
        - Hire agreement contract – a formal agreement outlining terms, conditions, duration and costs
        - Insurance and damage waiver – coverage for accidental damage, theft or loss
        - Delivery note – confirms the condition of the equipment at the time of delivery
        - Health and safety compliance – ensures the hirer understands safety guidelines and proper use
    - on-hire checklist can include:
        - equipment is inspected and documented before handover
        - user training or instructions provided if needed
        - contract and payment terms agreed upon and signed

- Contract documentation for **off-hire** (returning equipment):
    - when returning the equipment, the following documents are required:
        - off-hire request – a formal request to end the hire period

        - collection note – confirms that the equipment has been picked up
        - return inspection report – assesses equipment condition for any damage or excessive wear
        - final invoice – based on the hire duration, usage and any additional charges for damage or late return
    - off-hire checklist:
        - equipment is returned in agreed condition
        - inspection carried out for damage or missing parts
        - final payments or penalties settled

- **Methods of creating and closing orders for hire:**
    - creating hire orders:
        - confirm customer details (ID, payment method and account status)
        - verify availability of the hire item(s)
        - ensure terms and conditions are communicated and agreed upon
        - record order details in the system (customer details, item description, hire period and cost)
        - generate a hire agreement (digital or paper)
        - assign a unique order reference number
        - inspect and log the condition of hire items before dispatch
        - take photographs and document serial numbers if applicable
        - obtain a signed receipt upon collection/delivery
    - closing hire orders:
        - verify the return date and ensure it matches the agreed terms
        - conduct a thorough inspection for damages or missing parts
        - update the hire record with the return status
        - invoice the customer for any extra charges (late fees or damages)
        - process refunds or deposits if applicable
        - mark the order as closed in the system

- **Record keeping for lost hires:**
  - identify why the hire was lost
  - keep a record of all lost hires to eliminate the issue in the future
  - look at stock levels to make sure there is a balanced stock level of common products that are required at urgent requirement

- **Hire fleet data:**
  - asset details:
    - asset ID/serial number
    - make and model
    - category
    - year of manufacture
    - operational status – availability, maintenance/service history
    - hire and usage information – hire rate, usage hours/mileage, last and next service date
    - condition and compliance – pre and post-hire inspection reports, certifications and insurance details
  - spare equipment:
    - stock levels – number and location of spare units available
    - compatibility – list of machines/tools the spare parts are compatible with
    - maintenance and rotation schedule – ensuring regular checks and readiness for deployment
    - procurement and replenishment records – suppliers, lead times and reorder points
  - resources (consumables and accessories):
    - consumables – fuel, lubricants, blades, brill bits and welding electrodes
    - accessories – attachments (buckets, augers and hydraulic breakers) and safety gear (harnesses, hard hats and gloves)
    - stock management – minimum stock levels, reorder alerts, and issue and return tracking
  - personnel resources:
    - operators and technicians – name, ID, certifications, assigned equipment and job history
    - hire desk and logistics staff – contact details and responsibilities

        - training and compliance records – expiry dates for training and qualifications

- **Checks and operational testing** to conduct when getting equipment ready for hire, may include:
    - visual inspection:
        - check for physical damage (cracks, wear and corrosion)
        - ensure all components are intact and properly fitted
        - verify labels, serial numbers and compliance stickers
    - mechanical and electrical integrity:
        - test moving parts for smooth operation
        - check electrical cables, plugs and sockets for wear or damage
        - ensure hydraulic/pneumatic hoses are free of leaks and wear
    - safety features:
        - test emergency stop buttons, guards and safety cut-offs
        - verify that warning lights and alarms function correctly
        - ensure personal protective equipment (PPE) requirements are communicated
    - operational testing:
        - start the equipment and check for unusual noises or vibrations
        - run through all essential functions to confirm performance
        - test load-bearing capacity (if applicable)
    - cleaning and fuelling:
        - clean the equipment and remove any debris
        - ensure the fuel, oil or battery levels are adequate
    - for equipment returns, the same checks still apply but also a wear and tear assessment to identify any chargeable damages to the customer

- **Process new hires:**
    - enter new hire details on the system

- check identification, verify billing address and contact details
- open account

- Process **damage waivers:**
  - verify damage waiver forms
  - confirm rental terms
  - update customer account with waiver details
  - enter the data into the company system to track coverage for future claims

- Process **orders:**
  - process incoming orders by confirming item availability
  - check customer information
  - enter order details into the system
  - ensure payment processing and shipping details are recorded accurately

- Process **returns:**
  - review returns request
  - check product conditions
  - process refunds or exchanges
  - update inventory levels
  - log return data into the system for recordkeeping and reconciliation

- **Comply with regulations and legislation relevant to their role:**
  - ensure all equipment meets safety regulations and conduct regular inspections
  - keep safety documentation up to date to comply with industry standards and legal requirements

- verify that all plant, tools and equipment are properly licensed and insured, ensuring compliance with local, state and national regulations regarding rentals and operations
  - monitor environmental regulations, ensuring that all equipment is used in accordance with sustainability practices and environmental laws
  - ensure that waste disposal is managed properly
  - ensure rental agreements, damage waivers and customer contracts are following legal requirements, ensuring all terms are clearly defined and customers are informed of their obligations

- **Take accountability and ownership** by:
  - setting priorities based on deadlines and customer needs
  - ensuring work is completed on time without constant supervision
  - taking responsibility by identifying solutions, addressing concerns promptly and following through to ensure tasks are completed successfully, without shifting blame

Customer relationships		
Knowledge	**Skills**	**Behaviours**
K16 Principles of customer relationships: **customer loyalty, customer support** and **increasing sales** **K17 Techniques for dealing with customer queries, requests and complaints** and escalation procedures	**S8 Manage customer relationships** **S10** Manage customer queries, requests and handle complaints within remit or escalate when required	**B2 Promote positive customer relations** **B4 Respond and adapt to work demands** and situations and know when to seek advice from others

Interview underpinned by a portfolio of evidence	
Pass criteria	***Distinction criteria***
CR1 Describes how they manage and promote positive customer relationships in line with organisational guidelines (K16, S8, B2) **CR2** Explains how they manage customer queries, requests and complaints and how they escalate these when they are outside of the remit of their role (K17, S10, B4)	***CR3*** *Explains the importance of managing customer relationships in line with organisational procedures (K16, S8)*
Amplification and guidance	

- **Customer loyalty, customer support** can be increased by:
  - keeping regular contact with customers
  - being upfront with prices, contract terms and stock availability
  - offering customers a personalised service, including being a nominated contact for the customer
  - increase technical knowledge to answer questions from customers directly

- **Increasing sales:**
  - offer other equipment that customers may need on site but have not ordered, for example, if certain products are commonly hired together, offer the other products to the customer
  - use past hire data to understand any patterns in customer spend and use this to keep a stock level on hand for when they may come in for last minute hires
  - keep customers up to date with any promotions that the depot may be offering to encourage a hire discount for the customer

- **Techniques for dealing with customer queries, requests and complaints:**
  - listen to the customer and take all relevant information down to build a picture of the issue
  - refrain from interrupting the customer allowing them to provide all communication

  - decide on the complexity of the query, request or complaint and how best to deal with it if possible
  - if it is not easily resolved, be clear with the customer that this will be looked into and the customer will be kept up to date with the outcome

- **Manage customer relationships:**
  - regular communication:
    - maintain consistent communication with customers
    - provide updates on orders
    - address concerns promptly
    - ensure customers are satisfied with service quality and equipment performance
  - customer support:
    - handle customer enquiries
    - resolve issues quickly
    - offer solutions
    - ensure a positive experience
  - feedback collection:
    - regularly collect feedback through surveys or calls
    - evaluate customer satisfaction
    - use insights to improve services, demonstrating commitment to continuous improvement
  - personalised service:
    - offer tailored solutions based on customer needs
    - anticipate future requirements
    - ensure personalised interactions, helping build trust and strengthen ongoing partnerships

- **Promote positive customer relations** by:
  - ensuring prompt responses to customer enquiries

- providing clear information about services
- keeping customers informed of any changes or delays
- understanding each customer's unique needs, tailoring rental solutions and offering recommendations based on their specific requirements
- actively listening to customer concerns, offering quick resolutions and following up to ensure satisfaction

- **Respond and adapt to work demands** by:
  - staying flexible
  - adjusting to new tasks and changes in priorities without hesitation
  - staying organised, tackling deadlines and knowing when to delegate or ask for help
  - recognising when skills fall short, seeking guidance or mentorship

Fraud prevention	
Knowledge	
K8 Organisational procedures and **tactics for the prevention of fraudulent plant, tools or equipment hire**	
Interview underpinned by a portfolio of evidence	
Pass criteria	***Distinction criteria***
FP1 Explains the organisational procedures and tactics used to prevent fraudulent hire (K8)	*No distinction criteria*
Amplification and guidance	
• **Tactics for the prevention of fraudulent plant, tools or equipment hire:** ○ use order numbers and/or identification from customers.	

- do not accept hires from site operatives without further authority from their employer.
- report any suspicious activity as soon as possible.
- have fleet tracked so you can easily trace any machines that are stolen/lost. Also using geofences if you think equipment is at risk of being moved fraudulently.
- obtain all relevant documentation like signed contracts and proof of hired in plant insurance before hire is confirmed.

Equipment repair and servicing

Knowledge	Skills
K11 Techniques for logging plant, tool and equipment breakdowns **K18 Maintenance and servicing requirements** of plant, tools and equipment: pre-checks, inspections, tool condition, **storage**, defect or fault identification	**S14 Log plant, tool and equipment breakdowns**, pass over to the service department
Interview underpinned by a portfolio of evidence	
Pass criteria	***Distinction criteria***
ER1 Describes how they log maintenance or servicing requirements and breakdowns for plant, tools or equipment and pass these to the service department in line with organisation procedures (K11, K18, S14)	***ER2*** *Explains the importance of logging plant tool and equipment breakdowns and the impact on the company of not doing this (K11, S14)*
Amplification and guidance	

- **Techniques for logging plant, tool and equipment breakdowns:**
  - manual logs:
    - use a structured logbook for operators to record breakdowns

    - include key details: date, time, equipment ID, issue description and actions taken
    - useful in smaller operations with minimal equipment
  - digital logs:
    - can include using spreadsheets
    - use predefined fields such as breakdown cause, repair status and technician name
    - allows filtering and analysis of recurring issues
  - computer maintenance systems:
    - hire software used by hire company may have the function to log all breakdowns
    - provides alerts, work order tracking and historical data analysis
    - ideal for large-scale operations
    - option to add QR scanning - attach QR codes to equipment for instant access to breakdown history/scanning the code with a mobile device can pull up maintenance logs

- **Maintenance and servicing requirements:**
  - identify servicing and maintenance requirements of equipment, along with frequency details
  - this should be logged with updates made as and when items are serviced and maintained
  - an asset log is important to have a clear picture of the machines within the fleet and the specific attention they require

- **Storage:**
  - specific areas for items can provide a good initial visual indication of stock available and allow the workshop to rotate items so they are not being over hired, causing damages and over use
  - there should be a clear quarantine area that houses any plant or tools that require further checks or repairs to make sure these are not accidently hired out
  - all items that are returned from hire should be placed in a checking area before being put back into available stock
  - how items are stored is also important to make sure no damage is caused to plant items when stored in the depot, as this could have a delay on sending out items to customers

- **Log plant, tool and equipment breakdowns:**
  - logging breakdowns:
    - record equipment breakdowns in the system, detailing the issue, equipment ID and location
    - flag it for immediate attention by the service department for further inspection and repair
  - notification to service team:
    - communicate the breakdown details to the service department via internal systems or email
    - provide specifics on the equipment, issue and urgency, ensuring prompt response and repairs
  - tracking repairs:
    - update the status of equipment breakdowns in the system
    - track service department progress
    - ensure repair timelines are met while keeping customers informed of any delays or status changes
  - post-repair documentation:
    - verify that repaired equipment meets operational standards
    - update the breakdown log
    - co-ordinate with the service department to ensure the equipment is ready for customer use or return to inventory

Delivery and collection	
Knowledge	**Skills**
K7 Equipment delivery and **collection procedures**	**S6** Arrange the delivery and collection of equipment

Interview underpinned by a portfolio of evidence	
Pass criteria	***Distinction criteria***
DC1 Describes how they arrange delivery and collection of equipment in line with organisational procedures (K7, S6)	***DC2*** *Outlines the importance of delivery and collection of equipment and the impact on the business if not done in line with organisational procedures (K7, S6)*

Amplification and guidance

- **Equipment delivery** procedures (on-hire process):
    - confirm the order – ensure equipment type, quantity and hire duration match the contract
    - inspect and test equipment – verify it is in good working condition
    - prepare delivery documents – delivery note, hire agreement and safety instructions
    - arrange transportation – select an appropriate vehicle for secure transport
    - equipment unloading – follow safety procedures for handling heavy machinery
    - inspection and handover – both parties check equipment for defects and missing parts
    - instructions – hirer has received user instructions and safety guidelines
    - documentation signing – the hirer signs a delivery note acknowledging receipt

- **Collection procedures** (off-hire process):
    - before collecting the equipment, the customer must:
        - submit an off-hire request – notify the rental company when the equipment is ready for return
        - clean and secure equipment – ensure equipment is free of debris and safely stored
    - when collecting the equipment, the hire controller must:
        - verify the equipment – ensure the correct items are being returned
        - conduct inspection – assess for damage, missing parts or excessive wear
        - load equipment safely – use proper handling procedures for transport

▪ sign collection note – both parties confirm the return in documented form ▪ final invoice is issued if applicable

IT systems	
Knowledge	**Skills**
K20 Use and **benefit of technology and digital systems** within the hire sector **K21 GDPR policies and procedures**	**S17** Use organisational IT technology and digital systems
Interview underpinned by a portfolio of evidence	
Pass criteria	***Distinction criteria***
IS1 Describes how they use information technology and digital systems in line with organisational procedures, and the benefit to the business of using these to carry out work tasks (K20, K21, S17)	*No distinction criteria*
Amplification and guidance	
• **Benefit of technology and digital systems:** ○ modern hire systems can promote a faster and more efficient way of getting hires live ○ using systems to gain live stock information can offer the customer a quicker turnaround on what items are required and what is available to them for immediate hire ○ mobile or tablet applications can be implemented by drivers to collect on-hire information, including photographs to show any damages immediately while on site with the customer to document before the damage charges are raised ○ tracking of plant can benefit the company in reducing thefts or loss of machines, and reduce insurance policies as machines can be traced more efficiently	

- **GDPR policies and procedures:**
    - the General Data Protection Regulation - a comprehensive data protection law that governs how organisations collect, store and handle personal data
    - the policy applies to all employees, contractors and third parties handling personal data on behalf of the company - it covers personal data collected through:
        - hire agreements and customer transactions
        - equipment tracking and monitoring
        - employee and contractor records
        - website enquiries and online bookings
    - it is a requirement of the regulation that companies retain data only as long as necessary for business and legal purposes, such as:
        - hire agreements and financial records – retained for 6 years (for tax and audit compliance)
        - customer and equipment records – reviewed annually and deleted when no longer needed
        - employee records – retained as required by employment laws
        - marketing data – retained until consent is withdrawn

Communication	
Knowledge	**Skills**
K14 Written communication techniques. Plain English principles using hire controller terminology **K15 Verbal communication techniques**. Giving and receiving information and matching style to audience	**S7** Apply **written communication techniques** for example invoices, checklists, restrictions to drivers and hauliers delivery times, process damage agreement, notification documentation and emails **S9** Verbally communicate with customers and colleagues using industry terminology

Interview underpinned by a portfolio of evidence	
Pass criteria	***Distinction criteria***
CO1 Describes how they communicate with others using written and verbal techniques in a way that is suitable for the context and supports task completion (K14, K15, S7, S9)	*No distinction criteria*
Amplification and guidance	

- **Written communication techniques:**
  - keep it short and clear, allowing the customer to understand but not be overwhelmed with information
  - be open for them to reply with questions and encourage this if they appear unsure
  - send relevant manuals, technical specifications and information specific to their needs only
  - keep an email trail of correspondence to return to if required for any discrepancies or further information
  - use a daybook to log all enquiries and calls
  - avoid jargon or explain it clearly

- **Verbal communication techniques:**
  - speak at the correct pace and not too fast so that the customer is able to absorb the information
  - adjust tone and style to each specific customer to demonstrate an inclusive manner
  - listen actively to each customer and their requirements
  - offer alternatives where the demands are not possible
  - ask as many questions as is necessary, if the customer is not clear on their needs
  - stay calm and professional with complaints, advise the customer of the steps that will be taken to resolve the issue and keep them updated with progress

Environmental and sustainability

Skills	
S2 Comply with environmental and sustainability principles, regulations, standards and organisational systems	
Interview underpinned by a portfolio of evidence	
Pass criteria	***Distinction criteria***
ES1 Describes how they **comply with environmental and sustainability principles**, regulations, standards and organisational systems (S2)	***ES2*** *Explains how following sustainability principles, regulations, standards organisational systems reduces the impact of the hire industry on the wider environment (S2)*
Amplification and guidance	

- **Comply with environmental and sustainability principles:**
  - ensure that the equipment available for hire is energy-efficient, complying with environmental regulations
  - regularly update the fleet to include energy-efficient machinery and promote the use of eco-friendly equipment
  - prioritise equipment that meets recognised environmental standards, such as those with low emissions or those certified with eco-labels
  - ensure that any consumables, such as oil, batteries or filters, are disposed of properly according to environmental standards
  - ensure that the equipment is built with recyclable materials and that customers are informed of proper disposal practices
  - track and report on the environmental performance of equipment, such as fuel consumption, emissions or overall environmental impact during operation
  - use environmental management systems (EMS) to monitor and manage environmental impacts
  - ensure that all hired equipment complies with national and local environmental regulations and industry standards, such as carbon emission limits or noise pollution controls
  - ensure that the equipment is certified and up to date with the latest environmental standards, such as EU's Eco-Design Directive for energy-related products

○ make sure that customers are informed about any relevant regulations, including how to use equipment in a way that minimises environmental harm

<table>
<tr><th colspan="6">CPD, EDI and team working</th></tr>
<tr><th colspan="2">Knowledge</th><th colspan="2">Skills</th><th colspan="2">Behaviours</th></tr>
<tr><td colspan="2">K23 Team working principles

K24 Principles of equity, diversity, and inclusion in the workplace and the impact on their work</td><td colspan="2">S16 Carry out and record planned and unplanned learning opportunities and development activities

S18 Apply team working principles</td><td colspan="2">B5 Committed to continued professional development (CPD) to maintain and enhance competence in their own area of practice

B6 Support equity, diversity, and inclusivity in the workplace</td></tr>
<tr><th colspan="6">Interview underpinned by a portfolio of evidence</th></tr>
<tr><th colspan="3">Pass criteria</th><th colspan="3">Distinction criteria</th></tr>
<tr><td colspan="3">CE1 Describes how they support equity, diversity and inclusion rules, contributing to an inclusive workplace and the impact this has on their work (K24, B6)

CE2 Describes how they have carried out and recorded learning and development activities to show continual personal and professional development (CPD) to enhance their competence in their role (S16, B5)

CE3 Describes how they apply team working principles (K23, S18)</td><td colspan="3">CE4 Outlines the impact and the benefits of teamwork to the organisation and the wider team (K23, S18)</td></tr>
</table>

Amplification and guidance
Team working principles: - define roles for each team member, ensure everyone understands their responsibilities and how they contribute to the business. Use job descriptions and daily checklists to avoid confusion.   - maintain open and clear communication between departments, encourage regular team meetings and debriefs to discuss ongoing tasks and challenges.   - encourage a culture where team members support each other, especially during busy periods. Promote knowledge-sharing between experienced and new employees.   - work together to ensure a seamless experience for customers. Share customer feedback and concerns across departments for continuous improvement.   - encourage teamwork when resolving challenges such as missing equipment, breakdowns or delays.   **Principles of equity, diversity, and inclusion:**   - equity: - ensuring all employees have fair access to opportunities, training and career progression   - recognising that different employees may need different levels of support to succeed   - addressing pay gaps, bias in promotions and workplace accommodations for employees with different needs   - diversity: - hiring and supporting people from different backgrounds, abilities, ages, genders and cultures   - encouraging a variety of perspectives to improve problem-solving and innovation   - valuing the strengths and experiences that each employee brings to the team   - inclusion: - ensuring all employees feel valued, respected and included in decision-making   - providing inclusive policies, such as flexible working, anti-discrimination protections and religious accommodations   - encouraging open communication and zero tolerance for harassment or discrimination

- **Carry out and record planned and unplanned learning opportunities:**
    - planned training sessions:
        - schedule and record planned training sessions
        - ensure they align with company goals
        - track employee participation
        - update training records in the system after completion
    - workshops and seminars:
        - organise relevant workshops or seminars
        - document attendance
        - capture key learning outcomes
        - ensure employees have access to development resources and follow-up activities
    - on-the-job learning:
        - monitor on-the-job learning
        - document skills gained during work assignments
        - track progress in system records
        - ensure that employees' practical experience aligns with developmental goals
    - unplanned development activities:
        - log unplanned learning opportunities, like problem-solving scenarios or cross-department collaboration
        - record the activity details, outcomes and any new skills developed for future reference

- **Committed to continued professional development (CPD)** by:
    - regularly participating in relevant workshops, online courses or industry seminars
    - actively requesting feedback from colleagues and supervisors to identify areas for improvement
    - keeping up with industry trends, changes in legislation, and technological advancements by reading trade journals, attending webinars and joining professional networks to maintain expertise
    - regularly reviewing performance, identifying strengths and areas for development

Click here to return to contents

Assessment summary

The end-point assessment for the hire controller (plant, tools and equipment) apprenticeship standard is made up of 2 assessment methods:

1. A **45-minute** multiple-choice test consisting of **30 questions**
2. A **60-minute** (+10%) interview underpinned by a portfolio of evidence

As an employer/training provider, you should agree a plan and schedule with the apprentice to ensure all assessment components can be completed effectively.

Each component of the end-point assessment will be assessed against the appropriate criteria laid out in this kit, which will be used to determine a grade for each individual. The grade will be determined using the combined grades.

Multiple-choice test

All assessment methods are weighted equally. Total marks available are 30.

- To achieve a **pass**, apprentices will score at least 21 out of 30
- To achieve a **distinction**, apprentices must score at least 26 out of 30
- **Unsuccessful** apprentices will have scored 20 or below

The test may be delivered online or be paper-based and should be in a 'controlled' environment.

Interview underpinned by a portfolio of evidence

All assessment methods are weighted equally. Apprentices will be marked against the pass and distinction criteria outlined in this kit.

- To achieve a **pass**, apprentices must achieve all of the pass criteria
- To achieve a **distinction**, apprentices must achieve all of the pass criteria **and** all of the distinction criteria
- **Unsuccessful** apprentices will not have achieved all of the pass criteria

The interview underpinned by a portfolio of evidence may be conducted using technology such as video link, as long as fair assessment conditions can be maintained.

Grading

The apprenticeship includes pass and distinction grades, with the final grade based on the apprentice's combined performance in each assessment method.

To achieve a pass, the apprentice is required to pass each of the 2 assessment methods.

To achieve a distinction, the apprentice must achieve a distinction in the multiple-choice test and the interview underpinned by a portfolio of evidence.

The overall grade for the apprentice is determined using the matrix below:

Interview underpinned by a portfolio of evidence	Multiple-choice test	Overall grading
Fail	Any grade	Fail
Any grade	Fail	Fail
Pass	Pass	Pass
Distinction	Pass	Pass
Pass	Distinction	Pass
Distinction	Distinction	Distinction

Retake and resit information

If the apprentice fails one assessment method or more, they can take a resit or a retake at their employer's discretion. If a resit is chosen, please call the Highfield scheduling team to arrange the resit. If a retake is chosen, the apprentice will require a period of further learning and will need to complete a retake checklist. Once this is completed, please call the Highfield scheduling team to arrange the retake.

A resit is typically taken within 2 months of the EPA outcome notification. The timescale for a retake will be dependent on how much retraining is required but is typically taken within 4 months of the EPA outcome notification.

When undertaking a resit or retake, the assessment method(s) will need to be reattempted in full, regardless of any individual assessment criteria that were passed on any prior attempt. The EPA Report will contain feedback on areas for development and resit or retake guidance.

Any EPA component resit/retake must be taken within a 6-month period from the EPA outcome notification, otherwise, the entire EPA must be retaken in full. Apprentices should have a supportive action plan to prepare for the resit/retake.

Apprentices who achieve a pass grade cannot resit or retake the EPA to achieve a higher grade.

Where any assessment method has to be resat or retaken, the apprentice will be awarded a maximum EPA grade of pass, unless there are exceptional circumstances that are beyond the control of the apprentice as determined by Highfield.

Click here to return to contents

Assessing the multiple-choice test

The test consists of **30 multiple-choice questions** and will last **45 minutes**. The **pass** mark is 21 out of 30 and the **distinction** mark is 26 out of 30.

The multiple-choice test may be delivered online or be paper-based and should be taken in a 'controlled' and invigilated environment. The test is closed book, which means that the apprentice cannot refer to reference books or materials.

The apprentice must be given at least 14 days' notice of the date and time of the test.

Before the assessment

The employer/training provider should:

- brief the apprentice on the areas that will be assessed by the multiple-choice test.
- in readiness for end-point assessment, set the apprentice a mock multiple-choice test. A test is available to download from the Highfield Assessment website. The mock tests are available as paper-based tests and also on the mock e-assessment system.

Multiple-choice test criteria

Multiple-choice test
K1 Awareness of health and safety regulations, standards, and guidance and impact on role of the team and other construction trades. Employer and employee responsibilities. Control of Substances Hazardous to Health (CoSHH). Fire safety. Health and Safety at Work Act. Asbestos awareness. Manual handling. Fire extinguishers. Safety signage. Display equipment regulations. Situational awareness. Slips, trips, and falls. Working in confined spaces. Working at height. Electrical safety, respiratory protective equipment (RPE), dust suppression. Reporting injuries, diseases and dangerous occurrences regulations (RIDDOR), Provision and use of work equipment regulations (PUWER), Lifting operations and lifting equipment regulations (LOLER) Noise, Hand arm vibrations (HAVS) **K2** Awareness of environmental management systems and standards. Environmental Protection Act. Environmental signage and notices. Types of pollution and environmental control measures: noise, smells, spills, waste and disposal of hazardous waste. Types of pollution: Water, noise and air pollution **K3** Hire controller industry sectors: construction, contractors, infrastructure, energy and utilities and events **K4** Types and purpose of plant, tools and equipment (PTE): operating methods, function and application, technical specifications **K22** Certification requirements required for moving and handling on site equipment

Click here to return to contents

Assessing the interview underpinned by a portfolio of evidence

In the interview underpinned by a portfolio of evidence, the assessor asks the apprentice questions to assess their competence against the relevant criteria outlined in this kit.

The purpose is to assess the apprentice’s competence against the following themes:

- Health and safety
- Information, quotes and pricing
- Hire process and documentation and regulations
- Customer relationships
- Fraud prevention
- Equipment repair and servicing
- Delivery and collection
- IT systems
- Communication
- Environmental and sustainability
- Continuous professional development (CPD), equity, diversity and inclusivity (EDI) and team working

The apprentice must have access to their portfolio of evidence during the interview. They can refer to and illustrate their answers with evidence from their portfolio of evidence. However, the portfolio of evidence is not directly assessed.

Highfield must give an apprentice 14 days' notice of the interview. It will take place in a suitable environment and can be conducted by video conferencing. It must last for **60 minutes**. The independent assessor can increase the time of the interview by up to 10% to allow the apprentice to respond to a question if necessary.

The assessor will ask **at least 8 questions**. Follow-up questions are allowed where clarification is required.

Before the assessment

Employers/training providers should:

- ensure the apprentice knows the date, time and location of the assessment
- ensure the apprentice knows which criteria will be assessed (outlined on the following pages)
- encourage the apprentice to reflect on their experience and learning on-programme to understand what is required to meet the standard

- be prepared to provide clarification to the apprentice, and signpost them to relevant parts of their on-programme experience as preparation for this assessment

Grading the interview underpinned by a portfolio of evidence

Apprentices will be marked against the pass and distinction criteria included in the tables on the following pages (under 'Interview underpinned by a portfolio of evidence criteria').

- To achieve a **pass**, apprentices must achieve all of the pass criteria
- To achieve a **distinction**, apprentices must achieve all of the pass criteria **and** all of the distinction criteria
- **Unsuccessful** apprentices will have not achieved all of the pass criteria

Interview underpinned by a portfolio of evidence mock assessment

It is the employer/training provider's responsibility to prepare apprentices for their end-point assessment. Highfield recommends that the apprentice experiences a mock interview underpinned by a portfolio of evidence in preparation for the real thing. The most appropriate form of mock interview underpinned by a portfolio of evidence will depend on the apprentice's setting and the resources available at the time.

In designing a mock assessment, the employer/training provider should include the following elements in its planning:

- the mock interview underpinned by a portfolio of evidence should take place in a suitable location.
- a 60-minute time slot should be available to complete the interview underpinned by a portfolio of evidence, if it is intended to be a complete interview covering all relevant standards. However, this time may be split up to allow for progressive learning.
- consider a video or audio recording of the mock interview underpinned by a portfolio of evidence and allow it to be available to other apprentices, especially if it is not practicable for the employer/training provider to carry out a separate mock assessment with each apprentice.
- ensure that the apprentice's performance is assessed by a competent trainer/assessor, and that feedback is shared with the apprentice to complete the learning experience. Mock assessment sheets are available to download from the Highfield Assessment website and may be used for this purpose.
- Use 8 structured, 'open' questions that do not lead the apprentice but allows them to express their knowledge and experience in a calm and comfortable manner. For example:

- Health and safety
    - How do you comply with health and safety regulations?
- Hire process, documentation and regulations
    - Why are pre and post hire checks important?
- Customer relationships
    - Tell me about a time when you have had to escalate a complaint to someone else. Why was this?
- Equipment repair and servicing
    - Why is logging tool and equipment breakdowns important?
    - What is a potential impact of not logging breakdowns?
- Communication
    - Tell me about a time when you have used a written communication technique. Why was this a suitable method?
- Environmental and sustainability
    - How do you follow environmental and sustainability regulations and standards?
- CPD, EDI and team working
    - Tell me about the continuous professional development activities you have undertaken.

Interview underpinned by a portfolio of evidence criteria

Throughout the **60-minute** interview underpinned by a portfolio of evidence, the assessor will review the apprentice's competence in the criteria outlined below.

Apprentices should prepare for the interview underpinned by a portfolio of evidence by considering how the criteria can be met.

Health and safety
To pass, the following must be evidenced.
HS1 Explains how they comply with health and safety regulations, standards and guidance taking responsibility for their own health and safety in their role (S1, B1)
To gain a distinction, the following must be evidenced.
No distinction criteria

Information, quotes and pricing
To pass, the following must be evidenced.
IQ1 Explains how they use information extracted from for example, schedules, drawings, machine operator's manuals or manufacturer's instructions and specifications to complete tasks in line with organisational guidelines (K10, S13) **IQ2** Describes how they source plant, tools or equipment to meet customers' requirements, create and send hire quotations and enter purchase orders in line with organisational procedures (K9, S4, S5)
To gain a distinction, the following must be evidenced.
No distinction criteria

Hire process, documentation and regulations
To pass, the following must be evidenced.
HP1 Explains how they process new hires, damage waivers, orders and returns in line with regulatory and organisational contract hire terms and conditions, including recording the details on company systems (K5, S3, S11) **HP2** Describes how tool and equipment pre and post hire checks and operational testing of equipment are carried out in line with organisational procedures (K19, S15) **HP3** Explains how they take ownership and remain accountable in their role for carrying out hire transaction processes, including creating and closing orders and using hire fleet data in line with organisational and regulatory requirements (K6, K12, K13, S12, B3)

To gain a distinction, the following must be evidenced.
HP4 *Outlines the importance of pre and post hire checks and testing of tools and equipment and the impact on the business if not done in line with organisational procedures (K19, S15)*

Customer relationships
To pass, the following must be evidenced.
CR1 Describes how they manage and promote positive customer relationships in line with organisational guidelines (K16, S8, B2) **CR2** Explains how they manage customer queries, requests and complaints and how they escalate these when they are outside of the remit of their role (K17, S10, B4)
To gain a distinction, the following must be evidenced.
CR3 *Explains the importance of managing customer relationships in line with organisational procedures (K16, S8)*

Fraud prevention
To pass, the following must be evidenced.
FP1 Explains the organisational procedures and tactics used to prevent fraudulent hire (K8)
To gain a distinction, the following must be evidenced.
No distinction criteria

Equipment repair and servicing
To pass, the following must be evidenced.
ER1 Describes how they log maintenance or servicing requirements and breakdowns for plant, tools or equipment and pass these to the service department in line with organisation procedures (K11, K18, S14)
To gain a distinction, the following must be evidenced.
ER2 *Explains the importance of logging plant tool and equipment breakdowns and the impact on the company of not doing this (K11, S14)*

Delivery and collection
To pass, the following must be evidenced.
DC1 Describes how they arrange delivery and collection of equipment in line with organisational procedures (K7, S6)
To gain a distinction, the following must be evidenced.
DC2 *Outlines the importance of delivery and collection of equipment and the impact on the business if not done in line with organisational procedures (K7, S6)*

IT systems
To pass, the following must be evidenced.
IS1 Describes how they use information technology and digital systems in line with organisational procedures, and the benefit to the business of using these to carry out work tasks (K20, K21, S17)
To gain a distinction, the following must be evidenced.
No distinction criteria

Communication
To pass, the following must be evidenced.
CO1 Describes how they communicate with others using written and verbal techniques in a way that is suitable for the context and supports task completion (K14, K15, S7, S9)
To gain a distinction, the following must be evidenced.
No distinction criteria

Environmental and sustainability
To pass, the following must be evidenced.
ES1 Describes how they comply with environmental and sustainability principles, regulations, standards and organisational systems (S2)
To gain a distinction, the following must be evidenced.
ES2 *Explains how following sustainability principles, regulations, standards organisational systems reduces the impact of the hire industry on the wider environment (S2)*

CPD, EDI and team working
To pass, the following must be evidenced.
CE1 Describes how they support equity, diversity and inclusion rules, contributing to an inclusive workplace and the impact this has on their work (K24, B6) **CE2** Describes how they have carried out and recorded learning and development activities to show continual personal and professional development (CPD) to enhance their competence in their role (S16, B5) **CE3** Describes how they apply team working principles (K23, S18)
To gain a distinction, the following must be evidenced.
***CE4** Outlines the impact and the benefits of teamwork to the organisation and the wider team (K23, S18)*

Click here to return to contents