Highfield Level 2 End-Point Assessment for ST0327 Retailer

End-Point Assessment Kit

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EPA Kit

Contents

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How to use this EPA Kit

Welcome to the Highfield End-Point Assessment Kit for the Retailer apprenticeship standard.

Highfield is an independent end-point assessment organisation that has been approved to offer and carry out the independent end-point assessments for the Level 2 Retailer apprenticeship standard. Highfield internally quality assures all end-point assessments in accordance with its IQA process, and additionally all end-point assessments are externally quality assured by the relevant EQA organisation.

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 as a starting point.

Highfield also offers the Highfield Retailer Apprenti-kit that is a comprehensive learning resource, which is designed to be used on-programme.

For more information, please go to the Highfield Products website. Please note that the use of this kit is not a prerequisite for apprentices undertaking the Retailer end-point assessment.

Key facts

Apprenticeship standard:	Retailer
Level:	2
On-programme duration:	Typically 14 months (a minimum of 12 months)
End-point assessment window:	Typically 3 months
Grading:	Pass/distinction
End-point assessment methods:	Observation with questions Interview underpinned by portfolio

In this kit, you will find:

- an overview of the standard and any on-programme requirements
- a section focused on delivery, where the standard and assessment criteria are presented in a suggested format that is suitable for delivery
- 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

This occupation is found in organisations of all sizes within the retail and tourism sector including food, fashion, furniture and automotive. Retail outlets range from traditional high street shops to larger organisations such as supermarkets and department stores. It is found in multi-national employers, small independent employers and employers who trade through a variety of channels such as face-to-face, telephone, online and mail order retail.

The broad purpose of the occupation is to advise on and sell products and services in a customer-centric retail environment. This includes creating an accessible and well-presented environment. Retailers provide information and advice to customers regarding stock, products, different ways customers can shop and various payment methods.

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 Retailer 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 observation with questions, 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.

Throughout the period of learning and development, and at least every **2 months**, the apprentice should meet with the on-programme assessor to record their progress against the standard. At these reviews, evidence should be discussed and recorded by the apprentice. The maintenance of an on-programme record is important to support the apprentice, on-programme assessor and employer in monitoring the progress of learning and development. This will determine when the apprentice has achieved full competence in their job role and is therefore ready for end-point assessment.

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 portfolio.

It will typically contain **14 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 for the portfolio may include:

- workplace documentation and records
- workplace policies and procedures
- witness statements
- annotated photographs
- video clips with a maximum total duration of **5 minutes** and where the apprentice must be in view and identifiable

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

The portfolio 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. The independent assessor will have at least **2 weeks** to review the portfolio.

Use of Artificial Intelligence (AI) in the EPA

Where AI has been used as part of the apprentice's day-to-day work and forms part of a project report, presentation, or artefact, it should be referenced as such within the work. AI must not be used to produce the report or portfolio.

Where AI has been used as part of a portfolio that underpins an interview or professional discussion or any other assessment method, it should be fully referenced within the portfolio.

Additional, relevant on-programme qualification

There are no mandatory qualifications for apprentices for this standard. Employers may wish to choose the Highfield Level 2 Diploma in Retail (RQF) to help structure the on-programme delivery.

Readiness for end-point assessment

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

- the apprentice must have achieved **Level 1** English and maths.
- 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.
    - Waste reduction and recycling
    - Exchange and refunds

  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 **3-month** 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.

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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.

Documents used in developing this end-point assessment

Standard and end-point assessment plan (2023)

Retailer / Institute for Apprenticeships and Technical Education

Specific considerations

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

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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:

- 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 last around an **hour** and must be completed on or after the apprenticeship on-programme end date. It should be attended by the apprentice and the relevant people who have worked with the apprentice on-programme, such as the line manager/employer or mentor, the on-programme trainer/training provider and/or a senior manager (as appropriate to the business).

During the meeting, the apprentice, employer and training provider will discuss the apprentice's progress to date and confirm if the apprentice has met the full criteria of the apprenticeship standard during their on-programme training. 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 to initiate the end-point assessment process. If you require any support completing the Gateway Readiness Report, please contact your EPA Customer Engagement Manager at Highfield Assessment.

Please note: a copy of the standard should be available to all attendees during the gateway meeting.

Reasonable adjustments and special considerations
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 need to ensure that the person undertaking an assessment is indeed the person they are claiming to be. All employers are, therefore, required to ensure that each apprentice has their identification with them on the day of the assessment so the end-point assessor can check.

Highfield Assessment 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

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The Retailer 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.

Customer support		
Knowledge	**Skills**	**Behaviours**
K6 Methods for communicating with customers, to support and increase sales, and encourage **customer loyalty** **K8** The importance of **brand and business reputation** and what can affect it	**S1** Communicate with customers to meet their requirements and encourage **customer loyalty** and **repeat business** **S2** Serve customers in line with **brand standards, legislation, business procedures and the values of the business** **S4** Use **face to face or online sales techniques** such as product and price comparisons to support or influence the customer in their purchasing decisions	**B2** Acts as an **ambassador for their business and brand**

Observation with questions	
Pass criteria	***Distinction criteria***
CS1 Communicates using a **range of techniques** to identify customer requirements and influence their purchasing decisions in line with **legislation, brand standards, and business procedures and values** (K6, S1, S2, S4)	***CS3*** *Explains how their approach encourages* ***customer loyalty*** *and* ***repeat business*** *and why this is important (K6, K8, S1, S2, S4, B2)*

CS2 Acts as an **ambassador for the business or brand** to maintain its **reputation** (K8, B2)	

Amplification and guidance

- **Range of communication techniques** may include:
    - verbal
        - Vocabulary
        - Linguistic tone
        - Pitch
        - Accent/regional variations
        - Jargon/complex terminology
        - Empathetic responses
        - Adapting communication style depending on the customer, or any specific needs
    - non-verbal
        - Good spatial awareness
        - Eye contact
        - Body language
        - Facial expressions
        - Gestures
        - Behaviour
        - Writing

- **Face-to-face or online sales techniques** may include:
    - product or price comparisons
    - cross-selling and upselling
    - in-store events
    - limited time offers

- product demonstrations
- loyalty programmes
- email marketing
- social media engagement

- **Legislation** may include:
  - Consumer Rights Act 2015
  - Consumer Protection from Unfair Trading Regulations 2008
  - Equality Act 2010
  - Data Protection Act 2018
  - General Data Protection Regulation
  - Licensing
  - Natasha's Law
  - Health and Safety at Work etc. Act 1974

- **Brand standards** may include:
  - logo
  - graphics
  - colours
  - brand messaging
  - customer interaction
  - uniform and dress code/name badge
  - social responsibility
  - clean as you go/tidying
  - reacting to queues
  - customer service focus

- **Business procedures** may include:
    - inventory management
    - customer service standards
    - marketing and promotions
    - data protection and privacy
    - online and e-commerce operations
    - sustainability
    - collecting customer feedback such as through surveys, online tools or feedback forms
    - continuous improvement

- **Values of the business** may include:
    - customer-centric
    - integrity
    - quality
    - teamwork
    - diversity and inclusion
    - environmental responsibility

- An **ambassador for the business or brand** is an individual who represents and promotes the business/brand in a positive way.

- **Brand and business reputation** is how a brand/business is perceived by stakeholders, customers and competitors.

- **Customer loyalty** is a lasting and positive relationship between a customer and a business.

- **Repeat business** is when customers return to a business and make additional purchases multiple times and is a key indicator of customer satisfaction and loyalty.

<table>
<tr><th colspan="2">Stock control and merchandising</th></tr>
<tr><th>Knowledge</th><th>Skills</th></tr>
<tr><td>K5 The business approach to sustainability and its carbon footprint such as approaches to product sourcing, waste reduction and recycling

K9 The use of visual and/or digital merchandising skills including the use of “hot spots” and the relationship this has with sales and use of space

K10 How to maintain stock levels and the conditions they must be stored in to meet customer demand, sales opportunities, marketing activities and seasonal variations</td><td>S7 Maintain good merchandising to meet the needs of the business whilst ensuring safety

S8 Maintain stock levels and storage conditions such as correct temperature, lighting, ventilation, packaging to meet customer demand and minimise stock loss

S11 Comply with regulations and legislation relevant to their role and business</td></tr>
<tr><th colspan="2">Observation with questions</th></tr>
<tr><th>Pass criteria</th><th>Distinction criteria</th></tr>
<tr><td>SM1 Contributes to effective and safe merchandising activities, applying visual and/or digital skills to enhance sales (K9, S7)

SM2 Organises and maintains stock levels and storage conditions in order to meet customer demand and minimise losses (K10, S8)

SM3 Complies with relevant regulations, legislation, and business procedures, including those related to the business approach to sustainability such as waste reduction and recycling (K5, S11)</td><td>SM4 Explains how implementing successful merchandising and stock control supports the business, and the potential consequences of poor practice (K10, S8)</td></tr>
<tr><th colspan="2">Amplification and guidance</th></tr>
<tr><td colspan="2">Merchandising activities may include:
visual displays</td></tr>
</table>

- using ‘hot spots’, feature/promo ends, entrance foyers and free standing display units (FSDU)
- product arrangement including use of visual merchandising (VM) guidelines or planogram
- signs and posters
- pricing strategies
- limited time offers
- shelf management
- online merchandising
- digital signage and virtual reality
- safe working and aware of equipment/surroundings

- **Merchandising skills** may include:
  - visual creativity
  - attention to detail
  - colour coordination
  - product knowledge
  - communication skills
  - flexibility and utilising space
  - innovative thinking
  - seasonal themes
  - social media integration

- **Storage conditions** may include:
  - correct temperature
  - lighting
  - ventilation
  - packaging

    - pest controls

- **Relevant regulations, legislation and business procedures** may include:
    - Consumer Rights Act 2015
    - Consumer Protection from Unfair Trading Regulations 2008
    - Food safety regulations
    - Licensing
    - Advertising Standards Authority (ASA) Guidelines
    - Environmental Protection Act 1990
    - Natasha's Law

- The **business approach to sustainability** may include:
    - waste reduction
    - recycling
    - reducing single-use plastics
    - product sourcing
    - energy efficiency
    - carbon footprint reduction

- **Potential consequences of poor practice** in merchandising and stock control may include:
    - running out of stock, especially for popular products
    - overstocking
    - waste and shrinkage of stock through products expiring before being sold or theft due to inadequate security measures or stock rotation
    - reduced customer satisfaction
    - missed sales opportunities

○ poor brand reputation ○ loss of customer loyalty ○ increased costs

Technology		
Knowledge	**Skills**	**Behaviours**
K11 How to operate **IT and digital systems**, and **applications**	**S9** Use **technology and applications** to support sales and service ensuring that maintenance issues are reported	**B5** Works flexibly and adapts to circumstances

Observation with questions	
Pass criteria	***Distinction criteria***
T1 Uses **technology and applications** to support sales and service, reporting maintenance issues in line with the business' procedures, and explaining how they have adapted when necessary (K11, S9, B5)	***T2*** *Uses* ***IT and digital systems*** *confidently, explaining how they can improve the customer experience and benefit the business (K11, S9)*

Amplification and guidance
• **IT and digital systems, technology and applications** may include: ○ point of sales (POS) systems ○ hand-held terminals (HHT)/iPad ○ e-commerce platforms ○ mobile apps such as in-store availability or in-house apps available on mobile phones ○ radio frequency identification (RFID) technology ○ digital signage ○ inventory management systems

○ order management systems ○ e-mail marketing platforms ○ customer feedback platforms ○ systems for maintenance issues such as in-house maintenance logging system or helpdesk/hotline

Legislation, regulations and organisational policies/procedures		
Knowledge	**Skills**	**Behaviours**
K13 Relevant regulatory and legislative requirements which impact on the retail sector such as the sale of bladed items, high fats, salt and sugar, safety requirements, and age restricted sales **K16** The **business's policy for exchange and refunds** of products for in-store and/or on-line purchases	**S13 Handle complaints** within remit or escalate as appropriate	**B6** Acts in an open and approachable manner to build and maintain inclusive relationships with others
Interview underpinned by portfolio		

Pass criteria	*Distinction criteria*
LR1 Explains the **regulatory and legislative requirements** which impact on their role in retail (K13) **LR2** Details the **business's policy for exchange and refunds** of products (K16)	***LR4*** *Explains how dealing with **refunds, exchanges and legislative requirements** can impact on the business, both positively and negatively (K13, K16)*

LR3 Explains, with examples, how they have **handled or escalated complaints** in an approachable and professional way, building positive relationships with customers (S13, B6)	

Amplification and guidance
Relevant regulatory and legislative requirements may include: - Health and Safety at Work etc. Act 1974   - Fire Safety (England) Regulations 2022   - Reporting of Injuries, Diseases and Dangerous Occurrences Regulations (RIDDOR) 2013   - Working Time Regulations 1998   - Consumer Rights Act 2015   - Equality Act 2010   - Data Protection Act 2018   - General Data Protection Regulation   - General Product Safety Regulations 2005   - Single Use Carrier Bags Charges (England) Order 2015   - Food Safety Act 1990   - Food (Promotion and Placement) (England) Regulations 2021   - Natasha's Law   - Licensing Act 2003   - Tobacco and Related Products Regulations 2016   - Criminal Justice Act 1988   - Offensive Weapons Act 2019   **Business's policy for exchange and refunds** may include: - providing proof of purchase   - valid reasons for exchange/refund such as defective products or incorrect items received

    - eligibility such as products must be in their original condition, unused and with all the original tags and packaging
    - timeframe within which customers can request exchanges/refunds
    - refund methods such as original payment method, store credit or gift card
    - refund processing time
    - statutory rights

- **Handling complaints** may include:
    - active listening
    - attempt to defuse the situation
    - remain calm and professional
    - offer solutions
    - resolve promptly
    - escalation process
    - publicly acknowledge complaints online and respond promptly

Customer profiles, business objectives and reputation		
Knowledge	**Skills**	**Behaviours**
K1 The **customer profile** of the business and customers' purchasing habits **K2** The **business aims and objectives** and how their work contributes to them **K3** The **principles of running a retail business** to support the overall financial performance for	**S3** Provide a retail service that balances the **customers' needs** with additional linked products and services **S5** Promote **seasonal or local offers** through in-store or online promotions	**B1** Acts in a professional manner with integrity and confidentiality

example by aiming to exceed targeted sales and reduce wastage and returns **K4** The **makeup of the local community** and the requirements of customers within it **K7** The brands, products and services provided by the business including knowledge of the technical specification of a product and aftercare service	**S6** Identify situations that may damage **business reputation** in line with company policy and escalate as required **S12** Contribute to **continuous improvement activities** which focus on improving sustainability within the business **S14** Support sales across a range of **promotional events** throughout the calendar year	

Interview underpinned by portfolio	
Pass criteria	***Distinction criteria***
CP1 Describes the **typical customers of the local community**, the business, and their purchasing habits and how they use this to provide a retail service that balances **customer needs** with additional linked products and services, and the promotion of **seasonal or local offers** (K1, K4, S3, S5) **CP2** Describes the brands, products and services provided by the business and explain how this supports sales throughout the calendar year (K7, S14) **CP3** Explains how their role contributes to the **business aims and objectives**, and how it supports the overall financial performance of the business (K2, K3) **CP4** Gives examples of ways in which they can support **the business's approach to sustainability** in their role (S12)	***CP6*** *Explains the importance of understanding the* ***makeup of their local community*** *and how this impacts the requirements of the customer (K4)*

CP5 Describes how they identified a situation that had the potential to damage the **business' reputation** and the professional actions they took to minimise any damage (S6, B1)	

Amplification and guidance

- The **customer profile of the business** is who the target customers of the business are and the products/services that they typically purchase.

- **Business aims and objectives** may include:
  - sales and profitability
  - increased footfall or conversion
  - business positioning
  - enhance customer experience
  - brand awareness and loyalty
  - sustainable practices and social responsibility

- **Principles of running a retail business** may include:
  - customer-centric approach
  - quality products and services
  - effective merchandising
  - employee training and development
  - inventory management
  - sustainability and ethics
  - financial management
  - feedback and continuous improvement
  - risk management
  - legal and regulatory compliance

- **Makeup of the local community** may include:
    - demographic diversity
    - family structure
    - education and employment
    - income levels
    - cultural and religious diversity
    - tourists
    - interest groups
    - foodbanks/donations

- **Customer needs** may include:
    - product quality and reliability
    - convenience and accessibility
    - variety
    - multiple offerings to suit different customer types such as branded, middle range and value
    - competitive pricing
    - personalisation/tailored offers
    - efficient service
    - ease of returns and exchanges
    - sustainability and ethical considerations
    - speciality products

- **Seasonal or local offers** may include:
    - holiday promotions such as Christmas, Halloween, Easter and Valentine’s Day
    - back-to-school offers
    - summer savings

- local festivals and events

- **Business reputation** is how a business is perceived by stakeholders, customers and competitors.

- **Continuous improvement activities** may include:
  - customer feedback analysis
  - competitor analysis
  - employee training and development
  - regular performance reviews

- **Promotional events** may include:
  - flash sales
  - seasonal sales
  - community festivals
  - loyalty programme events
  - sample sales
  - themed sales
  - pop-up shops
  - social media challenges
  - collaborative events
  - customer challenges or competitions

- **Typical customers of the local community** may include:
  - families
  - students
  - seniors

○ working professionals ○ tourists ○ cultural and ethnic groups

Self and team development		
Knowledge	**Skills**	**Behaviours**
K12 How to support and influence the team and how all colleagues and teams work together to meet **business objectives** **K14 Principles of equality, diversity and inclusion** and the impact on the customer experience and business **K15** The **support requirements and/or coaching needs** of their team	**S10** Support team and colleague development through **buddying** and/or **coaching**	**B3** Seeks **learning opportunities** and continuous development **B4** Has accountability and ownership of their tasks and workload
Interview underpinned by portfolio		

Pass criteria	***Distinction criteria***
ST1 Provides examples of how they support and develop their team in line with **equality, diversity, and inclusion principles**, explaining how this benefits the customer and business (K12, K14, K15, S10) **ST2** Explains how they **manage their workload** and gives examples of when they have sought **learning and development opportunities** (B3, B4)	*No distinction criteria.*
Amplification and guidance	

- **Business objectives** may include:
    - the number of sales or footfall
    - business positioning
    - enhance customer experience
    - brand awareness and loyalty
    - sustainable practices and social responsibility

- **Principles of equality, diversity and inclusion** may include:
    - Equal treatment
    - Non-discrimination
    - Accessibility
    - Equality Act 2010
    - Diverse representation
    - Inclusive hiring practices
    - Effective training and education
    - Inclusive language and communication
    - Consistent customer journey

- **Support requirements and/or coaching needs** may include:
    - product knowledge training
    - supporting other team/departments
    - multi-skilled
    - customer service skills
    - sales techniques
    - use of technology
    - visual merchandising

    - time management
    - conflict resolution
    - health and safety
    - e-commerce and digital skills
    - feedback and performance reviews

- **Buddying** is where an experienced or knowledgeable employee is paired with a new or less experienced employee to provide guidance, support and training.

- **Coaching** is a structured and personalised approach to employee development, where an experienced manager or mentor provides guidance, support and feedback.

- **Managing workload** may include:
    - planning and organisation
    - delegation
    - rotas
    - asking for support when needed
    - secondments

- **Learning and development opportunities** may include:
    - product training
    - customer service workshops
    - sales techniques
    - communication skills
    - leadership development
    - digital skills training

- negotiation skills - ethics and compliance training - team building workshops

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Assessment summary

The end-point assessment for the Retailer apprenticeship standard is made up of **2 assessment** methods:

1. A **2.5-hour** (+10%) observation with questions, including a minimum of **5 questions**
2. A **60-minute** (+10%) interview underpinned by portfolio, comprised of at least **6 questions**

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.

Observation with questions

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 observation will be conducted in the apprentice's normal place of work.

Interview underpinned by portfolio

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 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 **each of the 2 assessment methods**.

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

Observation with questions	Interview underpinned by portfolio	Overall grade awarded
Fail any of the 2 assessment methods		**Fail**
Pass	Pass	**Pass**
Distinction	Pass	**Pass**
Pass	Distinction	**Pass**
Distinction	Distinction	**Distinction**

Retake and resit information

If an apprentice fails an end-point assessment method, it is the employer, provider and apprentice's decision whether to attempt a resit or retake. 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 **1 month** of the EPA outcome notification. The timescale for a retake will be dependent on how much retraining is required but is typically taken within **3 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 **6 months** 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 grade of pass**, unless there are exceptional circumstances that are beyond the control of the apprentice as determined by Highfield.

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Assessing the observation with questions

The independent assessor will observe the apprentice in their workplace. The observation will be of the apprentice completing their day-to-day duties under normal work conditions – simulation is not permitted. The independent assessor will only observe **1 apprentice** at any one time. The apprentice will be given **7 days'** notice of the observation with questions.

The observation with questions will last a total of **2.5 hours**. The independent assessor can increase the time by up to 10% to allow the apprentice to complete a task or respond to a question.

The observation with questions may be split into discrete sections held on the same working day. This includes breaks and moving between locations during the working day.

The independent assessor will brief the apprentice on the format of the observation with questions, including the timescales that they will be working to, before the start of the observation. The time taken for this briefing is not included in the assessment time.

The observation with questions will take place in the apprentice's normal place of work. Equipment and resources needed for the observation must be provided by the employer and be in good and safe working condition.

The independent assessor will observe the following during the observation:

- customer support
- stock control
- communication

Questioning can occur both during and after the observation. The time for the questioning is included in the overall assessment time. To remain as unobtrusive as possible, the independent assessor will ask questions during natural stops between tasks and after the completion of work, rather than disrupting the apprentice's flow. The independent assessor will ask at least **5 questions**. Follow-up questions are allowed where clarification is required.

Questioning that occurs after the observation will take place in a quiet room, free from distractions and influence. The independent assessor will ask questions about the criteria that were not observed, due to them not naturally occurring. These questions are in addition to the set number of questions and will be kept to a minimum.

Before the assessment

Employers/training providers should:

- ensure the apprentice knows the date, time and location of the assessment
- ensure the apprentice knows which retailer 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 and identify real-life examples
- 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 observation with questions

Apprentices will be marked against the pass criteria included in the tables on the following pages (under 'Observations with questions 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

Observation with questions 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 observation with questions in advance of the end-point assessment, with the training provider/employer giving feedback on any areas for improvement.

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

- the mock observation with questions should take place in a suitable location.
- a **2.5 hour** (+10%) time slot should be available for the observation with questions, if it is intended to be a complete mock observation with questions covering all relevant standards (outlined in the following pages). However, this time may be split up to allow for progressive learning.
- consider a video or audio recording of the mock observation with questions 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 observation with questions 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 a **minimum of 5 structured 'open' questions** that do not lead the apprentice but allows them to give examples for how they have met each area in the standard. For example:
    - how do you identify customer requirements and influence their purchasing decisions?
    - why are customer loyalty and repeat business important?
    - how do you contribute to effective and safe merchandising activities?
    - what are some of the potential consequences of poor stock control?
    - how do you use technology and applications to support sales and service?

Observation with questions criteria

Throughout the **2.5-hour** (+10%) observation with questions, the independent assessor will review the apprentice's competence in the criteria outlined below.

Apprentices should prepare for the observation with questions by considering how the criteria can be met.

Customer support
To pass, the following must be evidenced.
CS1 Communicates using a range of techniques to identify customer requirements and influence their purchasing decisions in line with legislation, brand standards, and business procedures and values (K6, S1, S2, S4) **CS2** Acts as an ambassador for the business or brand to maintain its reputation (K8, B2)
To gain a distinction, the following must be evidenced.
CS3 *Explains how their approach encourages customer loyalty and repeat business and why this is important (K6, K8, S1, S2, S4, B2)*

Stock control and merchandising
To pass, the following must be evidenced.
SM1 Contributes to effective and safe merchandising activities, applying visual and/or digital skills to enhance sales (K9, S7) **SM2** Organises and maintains stock levels and storage conditions in order to meet customer demand and minimise losses (K10, S8) **SM3** Complies with relevant regulations, legislation, and business procedures, including those related to the business approach to sustainability such as waste reduction and recycling (K5, S11)
To gain a distinction, the following must be evidenced.
SM4 *Explains how implementing successful merchandising and stock control supports the business, and the potential consequences of poor practice (K10, S8)*

Technology
To pass, the following must be evidenced.
T1 Uses technology and applications to support sales and service, reporting maintenance issues in line with the business' procedures, and explaining how they have adapted when necessary (K11, S9, B5)
To gain a distinction, the following must be evidenced.
T2 *Uses IT and digital systems confidently, explaining how they can improve the customer experience and benefit the business (K11, S9)*

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Assessing the interview underpinned by portfolio

In the interview underpinned by portfolio, the independent assessor and the apprentice will have a formal 2-way conversation. It will consist of the independent assessor asking the apprentice questions to assess their competence against the relevant criteria outlined in this kit. Employers are allowed to be present. However, this is optional.

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

The apprentice will be given **7 days'** notice of the interview. It will take place in a suitable environment and can be conducted by video conferencing. It will 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.

The independent assessor will ask **at least 6 questions**. Follow-up questions are allowed to seek clarification.

Before the assessment

Employers/training providers should:

- ensure the apprentice knows the date, time and location of the assessment
- ensure the apprentice knows which retailer 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 portfolio

Apprentices will be marked against the pass and distinction criteria included in the tables on the following pages (under 'Interview underpinned by portfolio 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 portfolio 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 portfolio in preparation for the real thing. The most appropriate form of mock interview underpinned by portfolio 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 portfolio should take place in a suitable location.
- a **60-minute** (+10%) time slot should be available to complete the interview underpinned by portfolio, 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 portfolio 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 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:
    - what are the regulatory and legislative requirements that impact on your role in retail?
    - tell me about a time you have handled or escalated a complaint.
    - what are some of the brands, products and services provided by your business and how does this support sales throughout the year?
    - how does your role contribute to the business's aims and objectives?
    - tell me about a time that you have supported and developed your team in line with quality, diversity and inclusion.
    - how do you manage your workload?

Interview underpinned by portfolio criteria

Throughout the **60-minute** (+10%) interview underpinned by portfolio, the independent assessor will review the apprentice's competence in the criteria outlined below.

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

Legislation, regulations and organisational policies/procedures
To pass, the following must be evidenced.
LR1 Explains the regulatory and legislative requirements which impact on their role in retail (K13) **LR2** Details the business's policy for exchange and refunds of products (K16) **LR3** Explains, with examples, how they have handled or escalated complaints in an approachable and professional way, building positive relationships with customers (S13, B6)
To gain a distinction, the following must be evidenced.
***LR4** Explains how dealing with refunds, exchanges and legislative requirements can impact on the business, both positively and negatively (K13, K16)*

Customer profiles, business objectives and reputation
To pass, the following must be evidenced.
CP1 Describes the typical customers of the local community, the business, and their purchasing habits and how they use this to provide a retail service that balances customer needs with additional linked products and services, and the promotion of seasonal or local offers (K1, K4, S3, S5) **CP2** Describes the brands, products and services provided by the business and explain how this supports sales throughout the calendar year (K7, S14) **CP3** Explains how their role contributes to the business aims and objectives, and how it supports the overall financial performance of the business (K2, K3) **CP4** Gives examples of ways in which they can support the business's approach to sustainability in their role (S12) **CP5** Describes how they identified a situation that had the potential to damage the business' reputation and the professional actions they took to minimise any damage (S6, B1)
To gain a distinction, the following must be evidenced.
***CP6** Explains the importance of understanding the makeup of their local community and how this impacts the requirements of the customer (K4)*

Self and team development
To pass, the following must be evidenced.
ST1 Provides examples of how they support and develop their team in line with equality, diversity, and inclusion principles, explaining how this benefits the customer and business (K12, K14, K15, S10) **ST2** Explains how they manage their workload and gives examples of when they have sought learning and development opportunities (B3, B4)
To gain a distinction, the following must be evidenced.
No distinction criteria.

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