

# **Highfield Level 3 End-Point Assessment for ST0070 Business Administrator**

End-Point Assessment Kit



# Highfield Level 3 End-Point Assessment for ST0070 Business Administrator

## EPA Kit

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### Versions:

ST0070 / v1.0 / AP02

BA v2.6

# How to use this EPA kit

Welcome to the Highfield end-point assessment kit for the Level 3 Business Administrator apprenticeship standard.

Highfield is an independent end-point assessment organisation that has been approved to offer and carry out the end-point assessments for the Level 3 Business Administrator apprenticeship standard. Highfield internally quality assures all end-point assessments in accordance with its IQA process. Additionally, all end-point assessments are externally quality assured by the relevant EQA organisation.

This 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 Business Administrator Apprenti-kit that is a comprehensive learning resource, which is designed to be used on-programme.

For more information, please go to

<https://www.highfield.co.uk/products/item/408/apprenticeship-standard-level-3-business-administrator/>

Please note that the use of this kit is not a prerequisite for apprentices undertaking the business administrator end-point assessment. For employers/training providers that use the Apprenti-kit, a criteria mapping document is available from Highfield if required.

## **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
- a section focused on the end-point assessment method where the assessment criteria are presented in a format suitable for carrying out mock assessments
- suggestions on how to prepare the apprentice for each part of the end-point assessment

# Introduction

## Standard overview

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Business administrators have a highly transferable set of knowledge, skills and behaviours (KSBs) that can be applied in all sectors. This includes small and large businesses alike from the public sector, private sector and charitable sector. The role may involve working independently or as part of a team and will involve developing, implementing, maintaining and improving administrative services. Business administrators develop key skills and behaviours to support their own progression towards management responsibilities.

The responsibilities of the role are to support and engage with different parts of the organisation and interact with internal or external customers. With a focus on adding value, the role of business administrator contributes to the efficiency of an organisation through the support of functional areas, working across teams and resolving issues as requested. The flexibility and responsiveness required allows the apprentice to develop a wide range of skills.

The business administrator is expected to deliver their responsibilities efficiently and with integrity - showing a positive attitude. The role involves demonstrating strong communication skills (both written and verbal) and adopting a proactive approach to developing their skills. The business administrator is also expected to show initiative, manage their priorities and their own time, demonstrate problem-solving skills, decision-making and potentially people management through mentoring or coaching others.

## On-programme requirements

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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 Business Administrator standard.

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 2 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.

Throughout the period of learning and development, and at least every 2 months (typically every 6 weeks), the apprentice should meet with the employer and on-programme assessor to record their progress against the standard. At these reviews, the employer and on-programme assessor should:

- set learning goals
- track the apprentice's progress
- create a forum for coaching and guidance
- coordinate 20% of the apprentice's time being spent in off-the-job training

Once the apprentice is deemed competent, the relevant section(s) of the standard should be signed off by the on-programme assessor and employer.

The maintenance of an on-programme record is important to support the apprentice, on-programme assessor and employer in monitoring the progress of the apprentice's learning and development and to determine when the apprentice has achieved full competence in their job role and is ready for end-point assessment. The on-programme assessment log is **not** a portfolio of evidence, but a record of what the apprentice can do following periods of training, development and assessment.

A portfolio of learning, containing at least 1 piece of evidence for each of the specified KSBs that are outlined later in this EPA kit, should be submitted to Highfield at gateway, a month prior to the interview. This will inform the interview.

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 professional discussion.

A project is completed from month 9 of the apprenticeship and should be completed prior to EPA being triggered. The project is submitted to Highfield at gateway, who will provide a question for the apprentice to answer in the presentation.

## **Use of Artificial Intelligence (AI) in the EPA**

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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**

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There are no mandatory qualifications for apprentices for this standard. Employers may wish to choose the Highfield Level 3 Diploma in Business Administration Skills (RQF) to help structure the on-programme delivery.

## **Readiness for end-point assessment**

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

- they must have successfully completed the Level 2 English and maths components of the apprenticeship. 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 employer must be confident that the apprentice has developed all the knowledge, skills and behaviours defined in the apprenticeship standard. 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.
- the portfolio must be completed and submitted to Highfield at gateway.
- the project must be completed and submitted to Highfield at gateway.

If you have any queries regarding the gateway requirements, please contact your EPA Customer Engagement Manager at Highfield Assessment.

## Order of end-point assessments

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The knowledge test must be the first assessment component undertaken. The portfolio and project will be submitted at gateway, 1 month prior to end-point assessment. Once the portfolio and project have been reviewed, the end-point assessor will provide a question for the project presentation and both the project presentation and portfolio interview will be scheduled.

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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 (2017):

[Business Administrator / Skills England](#)

End-point assessment plan (AP02, 2019):

[https://skillsengland.education.gov.uk/media/2878/st0070\\_business-admin\\_l3\\_ap-for-publication-2-april-2019-update-to-egap.pdf](https://skillsengland.education.gov.uk/media/2878/st0070_business-admin_l3_ap-for-publication-2-april-2019-update-to-egap.pdf)

## Specific considerations

In accordance with the business administrator assessment plan, Highfield has detailed which criteria **must** be covered by which assessment method at the end of this kit. Additionally, there are some criteria within the assessment plan that had been open for assessment by multiple assessment methods. Highfield has determined which assessment method these criteria will fall within and there is no carry-over of these assessment criteria between assessment methods.

All of the evidence criteria used within the end-point assessment have been written by Highfield and are based on the business administrator standard and its assessment plan. The criteria contained within each assessment method are equally weighted to each other. Therefore, Highfield have not distinguished each criterion as either pass or distinction, as the total of all criteria achieved within each assessment method will be used and combined with the totals of the other assessment methods to generate an overall grade.

The assessment plan states that the knowledge test should typically be passed before progressing to the portfolio interview and project presentation. Highfield will schedule all 3 assessments at once, the knowledge test taking place on a separate day, prior to the portfolio interview and project presentation. Typically, the apprentice will pass the test before they take the other 2 assessment methods. However, if they do not pass the knowledge test on their first attempt, they may proceed with attempting the other assessment methods before re-attempting the test. This interpretation of the assessment plan has been adopted to facilitate manageability for the employer, the training provider and the EPAO. Highfield will issue the overall result within 12 working days of the final assessment method.

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# Gateway

## How to prepare for gateway

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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 2 English
- Achieved Level 2 maths
- Completed their portfolio of learning
- Completed their project

Therefore, apprentices should be advised by employers and providers to gather this evidence throughout 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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# **Business Administrator apprenticeship standard**

The following pages contain the Level 3 Business Administrator apprenticeship standard and the assessment criteria in a suggested format that is suitable for delivery.

The organisation	
Knowledge	
Learners need to show they understand their organisational purpose, activities, aims, values, vision for the future, resources, and the way that the political/economic environment affects the organisation.	
Portfolio interview	
Indicative assessment criteria	
K1.1	Identify the organisation's: <ul style="list-style-type: none"> <li>• <b>purpose</b></li> <li>• aims</li> <li>• ways of working</li> </ul>
K1.2	Describe how to apply the above in the <b>context</b> of the local (or sector) environment
K1.3	Demonstrate a <b>thorough understanding</b> of the organisation's: <ul style="list-style-type: none"> <li>• <b>purpose</b></li> <li>• aims</li> <li>• ways of working</li> </ul>
Knowledge test	
Indicative assessment criteria	
K1.4	Describe the purpose and vision of the organisation
K1.5	Explain how the <b>wider political</b> and <b>economic</b> environment can affect the organisation

### Amplification and guidance

**Purpose:** public, private, non-profit, goal

**Context:** perspective, circumstance, setting

**Thorough understanding:** be able to show **detailed** understanding of why they carry out and complete tasks in the manner/method that they do

**Wider:** a broader, deeper understanding of the political **and** economic environment

**Political environment:**

Government actions/activity that affect the operation of the organisation or sector. These may be:

- local
- regional
- national
- international
- the party in power
- issues being discussed by the majority
- policy making
- institutions/government departments

**Economic environment:**

- employment
- income
- inflation
- interest rates
- productivity

- behaviour of consumers and institutions

**Guidance: K1.4 Describe the purpose and vision of the organisation**

Content areas to cover:

- how employees help the organisation achieve its goals
- learning and development needs, appraisals, objectives
- mission statements
- organisational structures, e.g. tall, wide, functional, flat, etc.
- partnerships and sole traders
- private and public sector – features, aims, objectives, etc.
- relevant policies and documents
- vision statement

**Guidance: K1.5 Explain how the wider political and economic environment can affect the organisation**

Content areas to cover:

- economic upturns, recessions
- how political and economic environment affect: costs, revenues, profits, turnover, morale, supply, demand, customer image, etc.
- span of control

Value of their skills	
Knowledge	
Knows organisational structure and demonstrates understanding of how their work benefits the organisation. Knows how they fit within their team and recognises how their skills can help them to progress their career.	
Portfolio interview	
Indicative assessment criteria	
K2.1	Describe the <b>structure</b> of the organisation
K2.2	Explain <b>how own work contributes</b> to the organisation
K2.3	Explain how <b>different</b> teams support each other
K2.4	Explain how to <b>promote</b> the value of their work and how this contributes to the organisation
Project presentation	
Indicative assessment criteria	
K2.5	Identify their <b>role</b> within the team
K2.6	Identify the <b>value</b> of their skills
K2.7	Analyse their skills, <b>compared</b> with <b>others</b>

### Amplification and guidance

**Structure:**

- the rules and policies which define work roles and responsibilities
- how information flows from level to level within the organisation
- a specific hierarchy, each employee's job role
- centralised or de-centralised
- functional/bureaucratic
- divisional or multi-divisional
- flat

**How own work contributes:** the benefit of their work to the organisation

**Role:** position, function, responsibility, job

**Value:** importance, worth, usefulness, significance within their current position **and** the potential to advance their career

**Different:** learners need to be able to discuss **two** other teams and departments within the organisation that have separate goals and expectations and how they support their own team or how their team supports them

**Promotes:** publicises, makes it known

**Compare:** relate, liken, evaluate, judge, assess, measure, match

**Others:** peers, team members, management

Stakeholders	
Knowledge	
Has a practical knowledge of managing <b>stakeholders</b> and their differing relationships to an organisation. This includes internal and external customers, clients and/or suppliers. Liaises with internal/external customers, suppliers or <b>stakeholders</b> from inside or outside the UK. Engages and fosters relationships with suppliers and partner organisations.	
Portfolio interview	
Indicative assessment criteria	
K3.1	Explain <b>how to work with stakeholders to achieve results</b>
K3.2	Describe how to liaise with the following customers: <ul style="list-style-type: none"> <li>• internal</li> <li>• external</li> <li>• suppliers</li> <li>• stakeholders inside or outside the UK</li> </ul>
K3.3	Explain how to go <b>beyond expectations</b> to build constructive relationships with stakeholders
Project presentation	
Indicative assessment criteria	
K3.4	Explain <b>how to</b> manage <b>stakeholders</b> including: <ul style="list-style-type: none"> <li>• <b>clarifying</b> expectations</li> <li>• <b>delivering</b> on expectations</li> </ul>
K3.5	Explain how to follow the <b>principles</b> of stakeholder management

Knowledge test	
Indicative assessment criteria	
K3.6	Identify methods of <b>stakeholder</b> management
K3.7	Describe the differing <b>stakeholder</b> relationships to an organisation including: <ul style="list-style-type: none"> <li>• internal customers</li> <li>• external customers</li> <li>• clients and/or suppliers</li> </ul>
Amplification and guidance	
<p><b>How to:</b></p> <ul style="list-style-type: none"> <li>• identify</li> <li>• analyse</li> <li>• plan</li> <li>• communicate</li> <li>• clarify</li> <li>• negotiate</li> <li>• influence</li> <li>• deliver</li> </ul> <p><b>Working with:</b></p> <ul style="list-style-type: none"> <li>• internal customers</li> <li>• external customers</li> <li>• clients or suppliers</li> </ul>	

**Stakeholders:** those with an interest or concern in the business. Anyone who can affect or be affected by an organisation, strategy or project and can be internal or external, including:

- suppliers
- clients/customers
- partner organisations
- employees
- shareholders

**Clarifying:** explaining, making clear, refining

**Delivering:** producing, completing, meeting, supplying, finishing, presenting

- on time
- to the required level/standard

**Principles:**

- acknowledge and monitor concerns
- listen and communicate
- consult regularly
- develop relationships
- adopt processes and behaviour to suit the situation
- recognise interdependence of actions/teams
- work cooperatively
- acknowledge potential conflicts
- stakeholder engagement assessment matrix - unaware, resistant, neutral, supportive, leading

**Beyond expectations:** outside the scope of the requirements which add value and are beneficial

**Guidance: K3.6 Identify methods of stakeholder management**

Content areas to cover:

- conflicts of interest, handling complaints
- domestic and international stakeholders
- internal and external stakeholders
- learning plans and development
- levels of influence, including power/interest grids
- methods of communication
- power and interest of stakeholders
- stakeholder mapping, analysis, engagement

**Guidance: K3.7 Describe the differing stakeholder relationships to an organisation including:**

- **internal customers**
- **external customers**
- **clients and/or suppliers**

Content areas to cover:

- engagement levels
- assessing the impact on different stakeholders of a decision/change, etc.
- primary and secondary stakeholders

Relevant regulation	
Knowledge	
Understands laws and regulations that apply to their role including data protection, health and safety, compliance etc. Supports the company in applying the regulations.	
Knowledge test	
Indicative assessment criteria	
K4.1	Outline <b>relevant laws and regulations</b> that apply to their role including: <ul style="list-style-type: none"> <li>• data protection</li> <li>• health and safety</li> <li>• compliance</li> </ul>
Portfolio interview	
Indicative assessment criteria	
K4.2	Outline <b>relevant laws and regulations</b> and how to <b>consistently</b> follow them
K4.3	Demonstrate a <b>thorough</b> knowledge of <b>relevant laws and regulations</b> and how to <b>consistently</b> follow them
K4.4	Describe how to <b>champion adherence</b> to <b>relevant laws and regulations</b> within the organisation
Amplification and guidance	
<b>Relevant laws and regulations</b> <ul style="list-style-type: none"> <li>• Worker Protection (amendment of Equality Act) Act</li> <li>• Employment Rights Act</li> <li>• Employment Relations Act</li> <li>• Contracts of Employment</li> <li>• Data Protection Act</li> </ul>	

- Copyright, Designs and Patent Act
- Freedom of Information Act
- Health and Safety Legal obligations
- The Health and Safety at Work etc. Act
- The Management of Health and Safety at Work Regulations
- Workplace (Health, Safety and Welfare) Regulations
- The Health and Safety (Display Screen Equipment) Regulations
- The Provision and Use of Workplace Equipment Regulations (PUWER)
- The Regulatory Reform (Fire Safety) Order
- Security of information and property
- Compliance

**Consistently:** reliably, constantly, over a period of time

**Thorough:** detailed, in-depth, full knowledge of **two** of the above laws or regulations relating to their own job role

**Champion adherence:** learners need to show they have supported and monitored the team to work within the laws and regulations listed

**Guidance: K4.1 Outline relevant laws and regulations that apply to their role including:**

- **data protection**
- **health and safety**
- **compliance**

Content areas to cover:

- accident and incident reporting procedures
- confidentiality

- direct and indirect discrimination
- diversity and inclusion
- Information Commissioner's Office (ICO)
- intellectual property rights
- minimum wage
- personal data/sensitive personal data
- protected characteristics
- risk assessments
- whistleblowing

Policies	
Knowledge	
Understands the organisation's <b>internal policies</b> and key business policies relating to sector.	
Portfolio interview	
Indicative assessment criteria	
K5.1	Describe how to <b>follow</b> the organisation's <b>internal policies</b>
K5.2	Describe how to <b>promote</b> the organisation's internal policies including <b>key business policies</b> relating to sector
Amplification and guidance	
<p><b>Internal policies:</b></p> <ul style="list-style-type: none"> <li>• employee conduct</li> <li>• equality and diversity</li> <li>• attendance and time off</li> <li>• dress code</li> <li>• computer use - internet access, social media use</li> <li>• substance abuse</li> </ul> <p><b>Follow:</b> must be able to demonstrate that they have followed relevant policies/procedures</p> <p><b>Promote:</b> makes known to the team</p> <p><b>Key business policies:</b> specific policies that relate to the organisation's sector</p>	

Business fundamentals	
Knowledge	
Understands the applicability of business principles such as managing change, business finances and project management.	
Knowledge test	
Indicative assessment criteria	
K6.1 Describe the <b>applicability</b> of <b>business principles</b>	
K6.2 Describe the <b>fundamentals</b> of <b>business finance</b>	
K6.3 Describe the <b>fundamentals</b> of <b>managing change</b>	
K6.4 Describe the <b>fundamentals</b> of <b>project management</b>	
Amplification and guidance	
<p><b>Applicability:</b> appropriateness, validity, relationship, relevancy, opportunity cost, quality standards, control, assurance</p> <p><b>Business principles:</b> e.g. corporate governance, quality assurance, quality control, internal quality standards, opportunity cost, time management and marketing (and the 4Ps)</p> <p><b>Fundamentals:</b> basics, essentials, the key principles</p> <p><b>Business finance:</b></p> <ul style="list-style-type: none"> <li>• balance sheets</li> <li>• breakeven</li> <li>• budgets</li> </ul>	

- cash flow
- creditors
- debtors
- expenditure
- liabilities
- revenue
- payroll

**Managing change:**

- acknowledging and understanding the need for the change
- communicating
- Dr John Kotter's change process
- evaluating
- implementing
- innovation
- planning, e.g. succession, contingency, strategic, consultation
- recognising individuals' comfort zones
- resistance and fear of change and how to manage this effectively
- types of change, e.g. developmental, incremental, process, structural, system, transformational/radical, etc.

**Project management:**

- leading
- managing
- organising
- planning
- resourcing
- securing

- succession

**Project management tools:**

- Gantt charts
- Eisenhower Matrix
- Herzberg's two-factor theory
  - motivators - factors that motivate a worker when present
  - hygiene factors - do not hold any motivational value when present, but have a de-motivational value if not present
- just-in-time (JIT) system
- lifecycle of a project - initiation, planning, execution, monitoring, close
- marketing mix
- PERT chart
- power/interest grid
- project dashboard
- resource analysis
- SWOT analysis
- total quality management (TQM)
- Tuckman's model of team development - forming, storming, norming, performing
- work breakdown structure

Processes	
Knowledge	
Understands the organisation's processes, e.g. making payments or processing customers' data. Is able to review processes autonomously and make suggestions for improvements. Applying a solutions-based approach to improve business's processes and helping define procedures. Understands how to administer billing, process invoices and purchase orders.	
Project presentation	
Indicative assessment criteria	
K7.1	Describe how to <b>consistently</b> follow the organisation's processes
K7.2	Outline how to make suggestions for <b>small</b> improvements and support on successful implementation
K7.3	Describe how to follow organisational processes and <b>promote</b> adherence and improvements to them
K7.4	Identify <b>inefficiencies</b> or <b>ineffectiveness</b> in a process and support on successful implementation of <b>rectification</b>
Amplification and guidance	
<p><b>Consistently:</b> learners need to show they have reliably and constantly followed organisational processes and be able to give 3 examples</p> <p><b>Small:</b> minor</p> <p><b>Promotes:</b> publicises, makes it known</p> <p><b>Inefficiencies:</b> wastefulness, shortfalls, failures, faults</p> <p><b>Ineffectiveness:</b> not practical, unworkable, inadequate</p> <p><b>Rectification:</b> fixing or correcting a problem</p>	

External environment factors	
Knowledge	
Understands relevant <b>external factors</b> , e.g. market forces, policy and regulatory changes, supply chain, etc. and the wider business impact. Where necessary understands the <b>international/global market</b> in which the employing organisation is placed.	
Knowledge test	
Indicative assessment criteria	
K8.1	Describe relevant <b>external factors</b> : <ul style="list-style-type: none"> <li>• market forces</li> <li>• policy and regulatory changes</li> <li>• supply chain</li> </ul>
Portfolio interview	
Indicative assessment criteria	
K8.2	Identify <b>external factors</b> affecting the organisation
K8.3	Describe how <b>external factors relate</b> to own role
K8.4	Demonstrate a deep understanding of the <b>external factors</b> facing the organisation
K8.5	Describe the placement of the organisation within the <b>international/global market</b> (where necessary)
Amplification and guidance	
<b>International/global market:</b> buying or selling goods and services throughout the world  <b>External factors:</b>	

- economic – factors affecting finance and/ or the financial status of the business
- market forces - the actions of buyers and sellers that cause the prices of goods and services to change, without being controlled by the government
- policy and regulatory changes - developed by the sector and government
- supply chain - the sequence of processes involved in the production and distribution of products and services

**Relate:** show how they link

**Guidance: K8.1 Describe relevant external factors:**

- **market forces**
- **policy and regulatory changes**
- **supply chain**

Content areas to cover:

- corporate social responsibility
- effects of various external factors, e.g. inflation, exchange rates, interest rates, unemployment, laws, economic upturn or downturn, recession, tariffs, barriers, embargos, etc.
- how external factors affect costs, revenues, profits, turnover, morale, supply, demand, growth, contracting etc.
- PEST analysis
- SWOT analysis

IT	
Skills	
<p>Skilled in the use of multiple IT packages and systems relevant to the organisation in order to write letters or emails, create proposals, perform financial processes, record and analyse data. Examples include MS Office or equivalent packages. Able to choose the most appropriate IT solution to suit the business problem. Able to update and review databases, record information and produce data analysis where required.</p>	
Portfolio interview	
Indicative assessment criteria	
S1.1	<p>Use <b>IT packages</b>, specifically to:</p> <ul style="list-style-type: none"> <li>• <b>write letters or emails</b></li> <li>• <b>record and analyse information</b></li> </ul>
S1.2	<p><b>Consistently</b> demonstrate use of IT packages, providing:</p> <ul style="list-style-type: none"> <li>• <b>varied</b> examples</li> <li>• quality examples</li> </ul>
S1.3	<b>Coach others</b> in the use of IT
Project presentation	
Indicative assessment criteria	
S1.4	Use <b>IT packages</b> to perform tasks relevant to own role without supervision
Amplification and guidance	
<p><b>IT packages</b>  For example, MS Office or equivalent. Bespoke packages may be used within the organisation, this will depend on the organisation and the job role. For example, legal, medical and educational establishments.</p>	

- **Write letters or emails**, which are appropriate to the in-house style and recognised standard conventions, i.e. grammatically correct, appropriate for the audience, professional format, formal, informal, etc.

- **Record information**

Learners will need to demonstrate they have recorded information

Correctly/accurately

Using the correct IT package i.e. spreadsheet, database, reports, etc.

Electronic

Manual

- **Analyse information**

Learners will be able to analyse the following types of business data:

**Qualitative:** deals with descriptions

Data that can be observed but not measured

**Quantitative:** deals with numbers

Can be measured

Will also be able to demonstrate that they have agreed **parameters**, selected **reliable** and **valid** data analysis methods and applied appropriate **analytical techniques**.

**Parameters:** limitations, restrictions

**Reliable:** consistent, trustworthy, dependable

**Valid:** effective, useable, acceptable, sound, logical, rational

**Analytical techniques:** key driver analysis, factor analysis

Learners will need to present the data in the most appropriate formats for the tasks, which could be:

- reports
- tables
- pie charts
- bar charts

**Consistently:** learners will need to demonstrate their IT skills with reliability

**Varied:**

- **Create proposals** according to the business's needs and job role

Proposals can be a:

- plan
- suggestion
- scheme
- project
- recommendation
- solution

- **Perform financial processes**

Financial processes can be:

- KPI monitoring
- budget management
- event management

### **Coach others**

- Team members
- Peers
- Identify the need for coaching
- Communicate the required knowledge and check understanding
- Provide the opportunity for others to practice the tasks
- Provide constructive and supportive feedback
- Monitor progress of new workplace skills and give assistance
- Report progress
- Identify performance problems or difficulties

Record and document production	
Skills	
Produces <b>accurate</b> records and documents including emails, letters, files, payments, reports and proposals. Makes recommendations for improvements and present solutions to management. Drafts correspondence, writes reports and able to review others' work. Maintains records and files, handles confidential information in compliance with the organisation's procedures. Coaches others in the processes required to complete these tasks.	
Portfolio interview	
Indicative assessment criteria	
S2.1	Ensure that records are <b>accurate</b> , and <b>rarely</b> require correction
S2.2	Ensure that records are treated confidentially, in compliance with the organisation's procedures
S2.3	Propose recommendations and solutions that only need <b>minor improvements</b>
S2.4	Support others with the production of documents
S2.5	Ensure that records are <b>consistently accurate</b> and confidential
S2.6	Recommend <b>insightful</b> improvements that result in a <b>clear benefit</b> to the organisation
S2.7	Coach others and provide relevant feedback
Amplification and guidance	
<b>Accurate:</b> precise, correct, exact, without errors and in line with organisational and recognised standard conventions, i.e. grammatically correct, appropriate for the audience, professional format, etc.	

**Rarely:** learners will need to demonstrate that they have produced accurate records that have only occasionally required correction or amendment

**Consistently:** learners will need to demonstrate that they have reliably produced accurate records

**Minor improvements:** learners will need to demonstrate that they have proposed reasonable recommendations and solutions, which only required slight correction or amendment

**Insightful:** perceptive, aware, understanding

**Clear benefit:** financial, time, resources, productivity

Decision making	
Skills	
Exercises proactivity and good judgement. Makes effective decisions based on sound reasoning and is able to deal with challenges in a mature way. Seeks advice of more experienced team members when appropriate.	
Project presentation	
Indicative assessment criteria	
S3.1	Decisions are thought through, using a <b>range</b> of information to make a <b>sound</b> judgement
S3.2	Challenges appropriately and is polite when doing so
S3.3	Exercises <b>sound</b> judgement when asking for advice by choosing the appropriate time, manner and person
S3.4	Decisions are <b>timely and consistently</b> show good judgement
S3.5	Decisions are <b>continuously</b> made by thoughtfully considering <b>different</b> information and the risks of any action
S3.6	Decisions are <b>fully</b> evidenced and <b>justifiable</b>
S3.7	<b>Consistently</b> behaves and seeks advice in a mature way
Amplification and guidance	
<b>Range:</b> Learners need to demonstrate the use of <b>three</b> different information sources: <ul style="list-style-type: none"> <li>• reports</li> <li>• charts</li> <li>• databases</li> <li>• policies and procedures</li> <li>• discussion</li> </ul>	

- questioning
- research
- any other relevant source

**Sound:**

Learners will need to demonstrate they have thorough, rigorous, positive, reliable and sensible judgement skills:

- selecting the right person for advice
- at the most appropriate time
- in the most appropriate way

**Timely and consistently:** learners will need to be able to demonstrate that they have made appropriate, sensible, suitable, well-timed, reliable, dependable decisions

**Continuously:** learners need to be able to demonstrate their decision-making skills consistently and reliably

**Different:** learners need to be able to demonstrate the use of **five** different sources of information

**Fully:** completely, entirely, wholly, totally

**Justifiable:** learners will need to be able to provide justifiable, acceptable, fair and sound reasoning for their decisions.

**Consistently:** learners will need to show that they have asked for advice and have behaved maturely and professionally on a regular basis

Interpersonal skills	
Skills	
Builds and maintains positive relationships within their own team and across the organisation. Demonstrates ability to <b>influence</b> and <b>challenge</b> appropriately. Becomes a role model to peers and team members, developing coaching skills as they gain area knowledge.	
Project presentation	
Indicative assessment criteria	
S4.1	Works effectively with a <b>range</b> of people
S4.2	<b>Influences</b> and <b>challenges</b> peers when necessary
S4.3	Supports others in the organisation and demonstrates coaching skills
S4.4	<b>Influence</b> managers as well as peers
S4.5	Constructively <b>challenge</b> managers, as well as peers, when necessary
S4.6	<b>Proactively</b> offer coaching to others, providing relevant feedback
Amplification and guidance	
<p><b>Influence:</b> learners will need to show they have used their skills to sway, encourage, persuade, prompt, inspire, guide others</p> <p><b>Challenge:</b> learners will need to show they have used their skills to contest, dispute and question others in a professional manner</p> <p><b>Range:</b> learners will need to demonstrate they have effectively worked with <b>three</b> of the following:</p> <ul style="list-style-type: none"> <li>• clients</li> <li>• customers</li> <li>• managers</li> </ul>	

- peers
- stakeholders
- suppliers
- team members

**Proactively:** learners will need to demonstrate that they have acted in advance of a future activity

Communications	
Skills	
Demonstrates good communication skills, whether face to face, on the telephone, in writing or on digital platforms. Uses the most appropriate channels to communicate effectively. Demonstrates agility and confidence in communications, carrying authority appropriately. Understands and applies social media solutions appropriately. Answers questions from inside and outside of the organisation, representing the organisation or department.	
Portfolio interview	
Indicative assessment criteria	
S5.1	Demonstrate clear communication, both written and verbal
S5.2	Answer questions from inside and outside of the organisation, representing the organisation or department
S5.3	Use appropriate <b>communication channels</b> dependent on the subject matter
S5.4	Communication is <b>consistently</b> clear, both written and verbally
S5.5	Champions an appropriate choice of <b>communication channels</b>
Project presentation	
Indicative assessment criteria	
S5.6	Show flexibility to <b>different</b> situations
S5.7	<b>Consistently</b> answers queries from <b>both</b> inside and outside of the organisation in a confident way

### Amplification and guidance

**Different:** varied, diverse, not the same

**Consistently:** learners will need to demonstrate that they have reliably and constantly answered queries

**Communication channels:**

- formal
- informal
- unsolicited
- verbal
- written
- face to face
- digital platforms
- telephone

Quality	
Skills	
Completes tasks to a high standard. Demonstrates the necessary level of expertise required to complete tasks and applies themselves to continuously improve their work. Is able to review processes autonomously and make suggestions for improvements. Shares administrative best practice across the organisation, e.g. coaches others to perform tasks correctly. Applies problem-solving skills to resolve challenging or complex complaints and is a key point of contact for addressing issues.	
Portfolio interview	
Indicative assessment criteria	
S6.1	<b>Checks</b> own work before submission and makes improvements
S6.2	Produce work that is <b>largely</b> accurate and meets expectations
S6.3	Identify areas for improvement and can <b>justify</b> why
S6.4	Promote best practice examples of administration, such as <b>accurate</b> records
S6.5	Take ownership for work and <b>apply</b> processes to check it
S6.6	Produce work that is <b>consistently accurate</b> and meets the agreed outcomes
S6.7	Identify, recommend and implement process improvements
S6.8	<b>Proactively coach</b> others and communicate requirements for work

### Amplification and guidance

**Checks:** learners will need to demonstrate they have inspected and confirmed their own work

**Largely:** for the most part, mainly

**Justify:** explain, support, validate

**Accurate:** precise, correct, exact, without errors and in line with organisational and recognised standard conventions, i.e. grammatically correct, appropriate for the audience, professional format, etc.

**Apply:** putting into action, using, utilising

**Consistently accurate:** learners will need to demonstrate that their work is:

- reliable
- precise
- correct
- exact
- without errors
- in line with organisational and recognised standard conventions, i.e. grammatically correct, appropriate for the audience, professional format

**Proactively:** learners need to be able to demonstrate they have acted on their own initiative and in advance of a future activity

**Coach:**

- identify the need for coaching
- communicate the required knowledge and check understanding
- provide the opportunity for others to practice the tasks
- provide constructive and supportive feedback

- monitor progress of new workplace skills and give assistance
- report progress
- identify performance problems or difficulties

## Planning and organisation

### Skills

Takes responsibility for initiating and completing tasks, manages priorities and time in order to successfully meet deadlines. Positively manages the expectations of colleagues at all levels and sets a positive example for others in the workplace. Makes suggestions for improvements to working practice, showing understanding of implications beyond the immediate environment (e.g. impact on clients, suppliers, other parts of the organisation). Manages resources, e.g. equipment or facilities. Organises meetings and events, takes minutes during meetings and creates action logs as appropriate. Takes responsibility for logistics, e.g. travel and accommodation.

### Portfolio interview

#### Indicative assessment criteria

- S7.1 Effectively **plan** work to achieve deadlines
- S7.2 Manage resources effectively, e.g. equipment or facilities
- S7.3 Effectively organise meetings and events
- S7.4 Take responsibility for logistics, e.g. travel and accommodation
- S7.5 Make **plans** that efficiently **maximise** resources and personally ensures results are achieved
- S7.6 **Proactively** take **responsibility** for areas of logistics

Project presentation	
Indicative assessment criteria	
S7.7	Shares areas to <b>improve</b> plans with others
S7.8	<b>Improve</b> the management of resources, e.g. identify cost savings or process improvements
S7.9	Make suggestions for improvements to working practice showing understanding of implications beyond immediate environment
Amplification and guidance	
<p><b>Plans:</b> prepares, arranges, organises, works out</p> <p><b>Maximise:</b> make the most of, take advantage of, get the best out of</p> <p><b>Proactive:</b> learners will need to demonstrate that they have acted in advance of a future activity</p> <p><b>Responsibility for areas of logistics:</b> this should be demonstrated with examples of excellent implementation of this</p> <p><b>Improves:</b> enhances, make better, adjusts, develops, perfects</p>	

Project management	
Skills	
Uses relevant project management principles and tools to scope, plan, monitor and report. Plans required <b>resources</b> to successfully deliver projects. Undertakes and leads projects as and when required.	
Project presentation	
Indicative assessment criteria	
S8.1	Effectively plan and manage <b>small</b> projects
S8.2	Able to lead <b>small</b> projects when required
S8.3	Plan and manage a <b>significant</b> project and describe what made it a success
Knowledge test	
Indicative assessment criteria	
S8.4	Identify <b>project management tools</b> and <b>principles</b>
S8.5	Describe strong <b>leadership skills</b> when managing a project
S8.6	Understands and is able to apply a strong grasp of <b>project management tools</b> and <b>principles</b>
Amplification and guidance	
<b>Project management principles:</b> <ul style="list-style-type: none"> <li>• controlling</li> <li>• evaluation</li> <li>• execution</li> <li>• leading</li> <li>• managing</li> <li>• monitoring</li> </ul>	

- organising
- planning
- reporting
- resourcing
- securing
- succession

**Project management tools:**

- Gantt charts
- Herzberg's two-factor theory
  - motivators - factors that motivate a worker when present
  - hygiene factors - do not hold any motivational value when present, but have a de-motivational value if not present
- just-in-time (JIT) system
- lifecycle of a project - initiation, planning, execution, monitoring, close
- marketing mix
- PERT chart
- project dashboard
- project database
- RACI matrix
- remote working
- total quality management (TQM)
- Tuckman's model of team development - forming, storming, norming, performing
- work breakdown structure

**Small:** minor, short, straightforward

**Significant:** large, substantial, important, major

**Resources:**

- equipment
- facilities
- funding/finance/budget
- staff

**Leadership styles:** e.g. authoritative, autocratic, charismatic, delegative, democratic, directing, laissez-faire, participative, servant, strategic, transformational, etc.

**Leadership skills:**

- commitment - follow through with agreements
- communication - clear, succinct, listening, verbal, written
- creativity - using non-traditional solutions
- delegation - identify individual and team skills and utilise these
- feedback - consistently and continually seek opportunities to give positive and constructive feedback
- flexibility - ability to accept last-minute changes
- motivation - able to inspire and build self-esteem
- positivity - developing a positive atmosphere
- professional- ability to be reliable, set high standards and follow regulations
- responsibility - taking ownership of successes and failures
- trustworthiness - demonstrate integrity and develop trust

Professionalism	
Behaviours	
Behaves in a professional way. This includes personal presentation, respect, respecting and encouraging diversity to cater for wider audiences, punctuality and attitude to colleagues, customers and key stakeholders. Adheres to the organisation's code of conduct for professional use of social media. Acts as a role model, contributing to team cohesion and productivity - representing the positive aspects of team culture and respectfully challenging inappropriate prevailing cultures.	
Portfolio interview	
Indicative assessment criteria	
B1.1	Consistently behaves in a professional way
B1.2	Shows punctuality
B1.3	Show respect for others
B1.4	Show personal presentation
B1.5	Follow the standard of conduct required by the organisation
B1.6	Is a role model
B1.7	Show professionalism in their conduct
B1.8	Show respect for others, irrespective of background, even in difficult circumstances
B1.9	Can be relied upon to represent the team
B1.10	Can be an ambassador for the organisation

### Amplification and guidance

**Consistently:** learners need to show they have reliably and constantly behaved in a professional manner, giving consideration and taking responsibility for meeting the organisational requirements listed above.

**Professional/professionalism:** shows competence/skill, in line with organisational requirements, with regards to:

- personal presentation
- professional use of social media
- punctuality
- respect
- respecting and encouraging diversity to cater for wider audiences

**Punctuality:** timekeeping, reliability, regularity, promptness

**Respect:** value others, have a good opinion, appreciate, recognise ability and qualities

**Others:**

- colleagues
- customers
- key stakeholders

**Personal presentation:** suitable dress, personal grooming and hygiene

**Standard:** the organisation's guidelines, rules and expectations, accepted behaviour

**Role model:** demonstrating behaviour that consistently meets the organisational codes of conduct

**Difficult circumstances:** when under pressure, i.e. time constraints, busy periods, limited resources

**Relied upon:** learners need to show behaviour that is dependable, consistent, trustworthy, steadfast

**Ambassador:** representative, spokesperson

- Contributing to team cohesion and productivity - representing the positive aspects of team culture and respectfully challenging inappropriate prevailing cultures

Personal qualities	
Behaviours	
Shows exemplary qualities that are valued including integrity, reliability, self-motivation, being proactive and having a positive attitude. Motivates others where responsibility is shared.	
Portfolio interview	
Indicative assessment criteria	
B2.1	<p><b>Regularly</b> show:</p> <ul style="list-style-type: none"> <li>• integrity</li> <li>• reliability</li> <li>• positivity</li> <li>• self-motivation</li> </ul>
B2.2	<p><b>Always</b> show and encourage others to show more of:</p> <ul style="list-style-type: none"> <li>• integrity</li> <li>• reliability</li> <li>• positivity</li> <li>• self-motivation</li> </ul>
Amplification and guidance	
<p><b>Regularly:</b> learners will need to show they have repeatedly behaved using <b>all</b> the qualities listed.</p> <p><b>Always:</b> learners will need to show they have behaved, without fail, using <b>all</b> the qualities listed.</p>	

Managing performance	
Behaviours	
Takes responsibility for their own work, accepts feedback in a positive way, uses initiative and shows resilience. Also takes responsibility for their own development, knows when to ask questions to complete a task and informs their line manager when a task is complete. Performs thorough self-assessments of their work and complies with the organisation's procedures.	
Portfolio interview	
Indicative assessment criteria	
B3.1	<b>Clarifies</b> requirements and takes responsibility for work produced
B3.2	Acts with responsibility and delivers their work to the <b>right level of quality</b> without requiring additional supervision and coaching
B3.3	Asks for feedback and takes feedback on board
B3.4	Show a <b>strong</b> personal responsibility for all aspects of work
B3.5	Can work with <b>minimal</b> supervision, while adhering to: <ul style="list-style-type: none"> <li>• policies</li> <li>• procedures</li> <li>• standards</li> </ul>
B3.6	Takes responsibility for their own development by continually assessing the quality of their work
Amplification and guidance	
<b>Clarifies:</b> explained, simplified, made clear	
<b>Right level of quality:</b> accurate, without errors and to the agreed requirements and organisational expectations	

**Strong:** robust, dedicated

**Minimal:** the least

## Adaptability

### Behaviours

Is able to accept and deal with changing priorities related to **both** their own work and to the organisation.

### Portfolio interview

#### Indicative assessment criteria

B4.1 **Accept** change

B4.2 **Respond positively** to change

B4.3 **Evaluate** the impact of any change

B4.4 Seeks to **use** change to improve their work

### Amplification and guidance

**Accept:** acknowledge, agree to

**Respond positively:** react, act

**Evaluate:** assess, judge, measure, review

**Use:** applied, utilised

Responsibility	
Behaviours	
Demonstrates taking responsibility for team performance and quality of projects delivered. Takes a clear interest in seeing that projects are successfully completed and customers' requests are handled appropriately. Takes initiative to develop own and others' skills and behaviours.	
Portfolio interview	
Indicative assessment criteria	
B5.1	<b>Accept</b> personal responsibility for their own work
B5.2	<b>Deliver</b> their work <b>on time</b> and to the <b>right level of quality</b>
B5.3	Demonstrate ownership and willingness to see work completed
B5.4	Apply initiative in developing their own skills and behaviours
B5.5	Be a <b>role model</b> who takes personal responsibility for themselves and peers
B5.6	Aims to deliver work <b>within targets</b> and <b>deliver more than required in their role</b>
Project presentation	
Indicative assessment criteria	
B5.7	Develop their own skills and behaviours
B5.8	<b>Proactively</b> seeks opportunities to develop themselves and <b>share</b> this learning with others

### Amplification and guidance

**Accept:** acknowledge, recognise, take

**Deliver:** provide, complete, produce

**On time:** to the specified timescale

**Right level of quality:** accurate, without errors and to the agreed requirements and organisational expectations

**Role model:** demonstrating behaviour that consistently meets the organisational expectations of the role

**Within targets:**

- timescale
- budget
- quality

**Deliver more than required in their role:** exceed expectations, going beyond agreements and expectations, providing added value and benefit

**Proactively:** anticipatory, change oriented, self-initiated, acting in advance of a future activity

**Share with:**

- team members
- peers
- managers

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# Assessment summary

The end-point assessment for business administrator is made up of 3 components:

1. A 60-minute knowledge test consisting of 50 questions - *this should typically be passed before progressing to the interview or presentation*
2. A 45-minute portfolio interview
3. A Project presentation, which should last 15 minutes with a further 15 minutes for a Q&A session

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 guide, which will be used to determine an overall grade for the apprentice.

## Knowledge test

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- To pass the knowledge test, apprentices must achieve at least 60%, which equates to 30 out of 50

## Portfolio interview

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- To pass the portfolio interview, at least 60% of the criteria must be achieved

## Project presentation

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- To pass the project presentation, at least 60% of the criteria must be achieved

## Grading

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Each part of the EPA has a pass mark of 60% and must be passed in order to pass the overall apprenticeship. The percentage scored for each of the assessment methods is to be rolled up into an overall percentage to decide the grade for the apprenticeship. The following weighting is used:

- knowledge test - 20%
- portfolio interview - 40%
- project presentation - 40%

The knowledge test should typically be passed before progressing to interview and presentation.

The overall pass mark is 60% and a distinction will be awarded for higher levels of attainment. The below descriptions provide expectations for the grading levels.

### Fail = less than 60%

The apprentice has not sufficiently evidenced the knowledge, skills and behaviours to meet the standard. There has been a shortfall in demonstrating the KSBs on at least 1 of the assessment methods.

### Pass = 60-79%

The apprentice has shown an adequate level of performance across the standard. They can evidence a basic level of knowledge, understanding and application in demonstrating the learning outcomes. In particular, use of basic IT packages, communicating with different stakeholders, producing accurate records and documentation, and demonstrating learning of the working environment.

### Distinction = 80% and over

The apprentice has shown a high degree of expertise across the standard. They can evidence knowledge, understanding and application of learning. They can reflect on their own learning, evaluate their own performance and improve their performance in demonstrating specific learning, especially in how their role supports the wider team. Sharing learning with others, and seeking to promote best practice, is likely to warrant a distinction in addition to the other requirements of the standard.

## Retake and re-sit information

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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.

When undertaking a resit or retake, the assessment method(s) will need to be re-attempted in full, regardless of any individual assessment criteria that were passed on any prior attempt. It may be necessary to also re-attempt a 'pre-assessment' activity such as a project submission or proposal, we will advise this on the EPA Report and during the scheduling call. The EPA Report will contain feedback on areas for development and resit or retake guidance.

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

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## Assessing the knowledge test

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The following areas (knowledge) of the business administrator standard will be assessed by a 60-minute knowledge test consisting of 50 questions with the pass mark being 60% (30 out of 50).

The topics covered within the test are listed below:

- project management
- the organisation
- stakeholders
- relevant regulation
- business fundamentals
- external environment factors

In each paper, questions will cover each of the areas above, however not every aspect of every area will be covered in every test.

### Before the assessment

- While on-programme, the employer/training provider should brief the apprentice on the areas to be assessed by the knowledge test
- In readiness for end-point assessment, the apprentice should complete a sample test. The mock tests are available as paper-based tests and also on the mock e-assessment system.

## Knowledge test criteria

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The following pages include the criteria that are covered by the knowledge test.

The apprentice will	Criteria covered in the knowledge test
<b>The organisation</b>	
Learners need to show they understand their organisational, purpose, activities, aims, values, vision for the future, resources and the way that the political/economic environment affects the organisation.	<p>K1.4 Describe the purpose and vision of the organisation</p> <p>K1.5 Explain how the wider political and economic environment can affect the organisation</p>

The apprentice will	Criteria covered in the knowledge test
<b>Stakeholders</b>	
Has a practical knowledge of managing stakeholders and their differing relationships to an organisation. This includes internal and external customers, clients and/or suppliers. Liaises with internal/external customers, suppliers or stakeholders from inside or outside the UK. Engages and fosters relationships with suppliers and partner organisations.	<p>K3.6 Identify methods of stakeholder management</p> <p>K3.7 Describe the differing stakeholder relationships to an organisation including:</p> <ul style="list-style-type: none"><li>• internal customers</li><li>• external customers</li><li>• clients and/or suppliers</li></ul>

The apprentice will	Criteria covered in the knowledge test
<b>Relevant regulations</b>	
Understands laws and regulations that apply to their role including data protection, health and safety, compliance etc. Supports the company in applying the regulations.	<p>K4.1 Outline <b>relevant laws and regulations</b> that apply to their role including:</p> <ul style="list-style-type: none"> <li>• data protection</li> <li>• health and safety</li> <li>• compliance</li> </ul>

The apprentice will	Criteria covered in the knowledge test
<b>Business fundamentals</b>	
Understands the applicability of business principles such as managing change, business finances and project management.	<p>K6.1 Describe the <b>applicability</b> of business principles</p> <p>K6.2 Describe the <b>fundamentals</b> of <b>business finance</b></p> <p>K6.3 Describe the <b>fundamentals</b> of <b>managing change</b></p> <p>K6.4 Describe the <b>fundamentals</b> of <b>project management</b></p>

The apprentice will	Criteria covered in the knowledge test
<b>External environment factors</b>	
Understands relevant external factors, e.g. market forces, policy and regulatory changes, supply chain, etc. and the wider business impact). Where necessary understands the <b>international/global market</b> in which the employing organisation is placed.	<p>K8.1 Describe relevant <b>external factors</b>:</p> <ul style="list-style-type: none"> <li>• market forces</li> <li>• policy and regulatory changes</li> <li>• supply chain</li> </ul>

The apprentice will	Criteria covered in the knowledge test
<b>Project management</b>	
Uses relevant project management principles and tools to scope, plan, monitor and report. Plans required resources to successfully deliver projects. Undertakes and leads projects as and when required.	S8.4 Identify <b>project management tools</b> and <b>principles</b>
	S8.5 Describe strong <b>leadership skills</b> when managing a project
	S8.6 Understands and is able to apply a strong grasp of <b>project management tools</b> and <b>principles</b>

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## Assessing the portfolio interview

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The interview will last 45 minutes. The portfolio of learning provides a structure for this conversation. The portfolio should provide at least 1 piece of evidence for each of the KSBs outlined. A piece of evidence can cover more than 1 assessment criteria. This should be submitted to Highfield at gateway. Evidence is gathered on-programme and the employer should facilitate this through relevant tasks and support. The training provider should support where needed. The employer and training provider should review the portfolio with the apprentice and make a judgement on whether they should be progressed to end-point assessment. The interview assesses the understanding and learning that is shown in the portfolio; the portfolio is not directly assessed.

### **The interview assesses:**

- understanding of the portfolio to validate competence shown
- self-reflection of performance, demonstrating knowledge and how appropriate skills and behaviours have been applied
- judgement and understanding to explain appropriate examples

### **The portfolio should contain:**

- a minimum of 8-12 pages
- evidence of at least one of each of the minimum knowledge, skills and behaviours as outlined in the below assessment criteria
- documented evidence of practical observation and/or evaluation by the employer, such as acknowledgement of a skill shown or evidencing work completed on a particular project with manager comments, which is then discussed at interview

Note: the portfolio is not directly assessed; it is used to frame discussion at interview, where KSBs are to be demonstrated.

### **Before the assessment**

- Employers should undertake a mock marking activity around the portfolio that will help to plan for the interview
- Employers/training providers should plan a mock interview that relates to the portfolio and gives the apprentice the opportunity to demonstrate each of the required standards in the following pages

**Employers/training providers should:**

- ensure the apprentice knows the date, time and location of the assessment
- brief the apprentice on the activities to be carried out and the duration of the assessment (a minimum of 30-45 minutes)
- ensure the apprentice knows which business administrator 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 in preparation for their assessment

The apprentice is permitted to bring notes during the interview, however, these must be self-prepared notes and cannot be provided or influenced by the employer/training provider.

It is suggested that a mock assessment is carried out by the apprentice in advance of the end-point assessment with the training provider/employer giving feedback on any areas for improvement.

Apprentices will be marked against the criteria included in the tables on the following pages. Apprentices must achieve at least 60% of the stated portfolio interview criteria to pass the assessment.

## The portfolio interview - mock assessment

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It is the employer/training provider's responsibility to prepare apprentices for their end-point assessment, and Highfield recommends that the apprentice experiences a mock portfolio interview in preparation for the real thing. The most appropriate form of mock assessment 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:

- consider a video recording of the mock assessment, and allow it to be observed by 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. The mock assessment sheets may be used for this purpose.

Examples of the types of question that may be used include:

- 'Tell me about your organisational aims and objectives.'
- 'Tell me about occasions in which you have worked with different stakeholders.'
- 'Tell me about any laws and regulations that are relevant to your organisation.'
- 'Tell me about any external factors that may influence your organisation.'
- 'Can you tell me about any behavioural qualities that you feel may help you to fulfil your role?'

## Portfolio interview criteria

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During the portfolio interview, which will last 45 minutes, the following standards should be evidenced. Apprentices should prepare for the portfolio interview by ensuring that relevant evidence is gathered on-programme and by considering how the criteria can be met.

The organisation	
Indicative assessment criteria	
K1.1	Identify the organisation's: <ul style="list-style-type: none"> <li>• <b>purpose</b></li> <li>• aims</li> <li>• ways of working</li> </ul>
K1.2	Describe how to apply the above in the <b>context</b> of the local (or sector) environment
K1.3	Demonstrate a <b>thorough understanding</b> of the organisation's: <ul style="list-style-type: none"> <li>• <b>purpose</b></li> <li>• aims</li> <li>• ways of working</li> </ul>

Value of their skills	
Indicative assessment criteria	
K2.1	Describe the <b>structure</b> of the organisation
K2.2	Explain <b>how own work contributes</b> to the organisation
K2.3	Explain how <b>different</b> teams support each other
K2.4	Explain how to promote the value of their work and how this contributes to the organisation

Stakeholders	
Indicative assessment criteria	
K3.1	Explain how to <b>work with</b> stakeholders to <b>achieve results</b>
K3.2	Describe how to liaise with the following customers: <ul style="list-style-type: none"> <li>• internal</li> <li>• external</li> <li>• suppliers</li> <li>• stakeholders inside or outside the UK</li> </ul>
K3.3	Explain how to go <b>beyond expectations</b> to build constructive relationships with stakeholders

Relevant regulation	
Indicative assessment criteria	
K4.2	Outline <b>relevant laws and regulations</b> and how to <b>consistently</b> follow them
K4.3	Demonstrate a <b>thorough</b> knowledge of <b>relevant laws and regulations</b> and how to <b>consistently</b> follow them
K4.4	Describe how to <b>champion adherence</b> to <b>relevant laws and regulations</b> within the organisation

Policies	
Indicative assessment criteria	
K5.1	Describe how to <b>follow</b> the organisation's internal policies
K5.2	Describe how to <b>promote</b> the organisation's internal policies including <b>key business policies</b> relating to sector

External environment factors	
Indicative assessment criteria	
K8.2	Identify <b>external factors</b> affecting the organisation
K8.3	Describe how <b>external factors relate</b> to own role
K8.4	Demonstrate a deep understanding of the <b>external factors</b> facing the organisation
K8.5	Describe the placement of the organisation within the <b>international/global market</b> (where necessary)

IT	
Indicative assessment criteria	
S1.1	Use <b>IT packages</b> , specifically to: <ul style="list-style-type: none"> <li>• <b>write letters or emails</b></li> <li>• <b>record and analyse information</b></li> </ul>
S1.2	<b>Consistently</b> demonstrate use of IT packages, providing: <ul style="list-style-type: none"> <li>• <b>varied</b> examples</li> <li>• quality examples</li> </ul>
S1.3	<b>Coach others</b> in the use of IT

Record and document production	
Indicative assessment criteria	
S2.1	Ensure that records are <b>accurate</b> , and <b>rarely</b> require correction
S2.2	Ensure that records are treated confidentially, in compliance with the organisation's procedures
S2.3	Propose recommendations and solutions that only need <b>minor improvements</b>
S2.4	Support others with the production of documents
S2.5	Ensure that records are <b>consistently accurate</b> and confidential
S2.6	Recommend <b>insightful</b> improvements that result in a <b>clear benefit</b> to the organisation
S2.7	Coach others and provide relevant feedback

Communications	
Indicative assessment criteria	
S5.1	Demonstrate clear communication, both written and verbal
S5.2	Answer questions from inside and outside of the organisation, representing the organisation or department
S5.3	Use appropriate <b>communication channels</b> dependent on the subject matter
S5.4	Communication is <b>consistently</b> clear, both written and verbally
S5.5	Champions an appropriate choice of <b>communication channels</b>

Quality	
Indicative assessment criteria	
S6.1	<b>Checks</b> own work before submission and makes improvements
S6.2	Produce work that is <b>largely</b> accurate and meets expectations
S6.3	Identify areas for improvement and can <b>justify</b> why
S6.4	Promote best practice examples of administration, such as <b>accurate</b> records
S6.5	Take ownership for work and <b>apply</b> processes to check it
S6.6	Produce work that is <b>consistently accurate</b> and meets the agreed outcomes
S6.7	Identify, recommend and implement process improvements
S6.8	<b>Proactively coach</b> others and communicate requirements for work

## Planning and organisation

### Indicative assessment criteria

- S7.1 Effectively **plan** work to achieve deadlines
- S7.2 Manage resources effectively, e.g. equipment or facilities
- S7.3 Effectively organise meetings and events
- S7.4 Take responsibility for logistics, e.g. travel and accommodation
- S7.5 Make **plans** that efficiently **maximise** resources and personally ensures results are achieved
- S7.6 **Proactively** take **responsibility for areas of logistics**

## Professionalism

### *Indicative assessment criteria*

- B1.1 **Consistently** behaves in a **professional** way
- B1.2 Shows **punctuality**
- B1.3 Show **respect** for **others**
- B1.4 Show **personal presentation**
- B1.5 Follow the **standard** of conduct required by the organisation
- B1.6 Is a **role model**
- B1.7 Show **professionalism** in their conduct
- B1.8 Show **respect** for others, irrespective of background, even in **difficult circumstances**
- B1.9 Can be **relied upon** to represent the team
- B1.10 Can be an **ambassador** for the organisation

## Personal qualities

### *Indicative assessment criteria*

#### B2.1 **Regularly** show:

- integrity
- reliability
- positivity
- self-motivation

#### B2.2 **Always** show and encourage others to show more of:

- integrity
- reliability
- positivity
- self-motivation

## Managing performance

### *Indicative assessment criteria*

- B3.1 **Clarifies** requirements and takes responsibility for work produced
- B3.2 Acts with responsibility and delivers their work to the **right level of quality** without requiring additional supervision and coaching
- B3.3 Asks for feedback and takes feedback on board
- B3.4 Show a **strong** personal responsibility for all aspects of work
- B3.5 Can work with **minimal** supervision, while adhering to:
- policies
  - procedures
  - standards
- B3.6 Takes responsibility for their own development by continually assessing the quality of their work

## Adaptability

### *Indicative assessment criteria*

- B4.1 **Accept** change
- B4.2 **Respond positively** to change
- B4.3 **Evaluate** the impact of any change
- B4.4 Seeks to **use** change to improve their work

Responsibility	
<i>Indicative assessment criteria</i>	
B5.1	<b>Accept</b> personal responsibility for their own work
B5.2	<b>Deliver</b> their work <b>on time</b> and to the <b>right level of quality</b>
B5.3	Demonstrate ownership and willingness to see work completed
B5.4	Apply initiative in developing their own skills and behaviours
B5.5	Be a <b>role model</b> who takes personal responsibility for themselves and peers
B5.6	Aims to deliver work <b>within targets</b> and <b>deliver more than required in their role</b>

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## Assessing the project presentation

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The apprentice will complete their project from month 9 of the apprenticeship and this should be completed prior to end-point assessment being triggered. The project will be submitted **with the** Gateway Readiness Report.

The apprentice will then deliver a presentation on the project they have completed or a process they have improved. The presentation lasts 15 minutes, with a further 15 minutes for a Q&A session. The presentation must cover the assessment criteria listed below. Apprentices must achieve at least 60% of the stated project presentation criteria to pass the assessment.

**Once the project is submitted to Highfield, a question will be generated by the assessor. This question must be addressed/answered by the apprentice during the presentation. Examples of possible questions include:**

- how have you improved a process or operating practice?
- what were the steps you took to implement the project?
- what worked well and how would you improve the results in the future?

The presentation should summarise the aim, outcome and responsibilities of the KSBs shown below. The presentation should demonstrate how they approached a task and the skills shown in doing so, building towards how they would improve the results going forward.

The presentation is expected to be produced using Microsoft Office PowerPoint, Prezi or similar, demonstrating the required level of IT skills.

Further requirements:

- a project or process improvement should account for 21 to 35 working hours over the apprenticeship, to adequately apply themselves
- must be work-based, incorporating scoping, planning, managing, communicating to stakeholders, monitoring and reporting results
- the apprentice chooses the project/process improvement with the guidance of the employer and training provider

## **Before the assessment**

Employers/training providers should:

- ensure the apprentice knows the date, time and location of the assessment
- ensure the apprentice knows which business administrator 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

It is suggested that a mock assessment is carried out by the apprentice in advance of the end-point assessment with the training provider/employer giving feedback on any areas for improvement.

## **Project presentation - mock assessment**

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It is the employer/training provider's responsibility to prepare apprentices for their end-point assessment, and Highfield recommends that they complete a mock project presentation in preparation for the real thing.

The employer/training provider should carry out a mock assessment of the presentation. This would take the form of the apprentice presenting their project, which could then be marked against the criteria on the following pages.

Consider an audio recording of the mock, and to allow the mock to be observed by 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. The mock assessment document sheets later in this guide may be used for this purpose.

## Project presentation criteria

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Indicative assessment criteria	
Value of their skills	
K2.5	Identify their <b>role</b> within the team
K2.6	Identify the <b>value</b> of their skills
K2.7	Analyse their skills, <b>compared</b> with <b>others</b>

Indicative assessment criteria	
Stakeholders	
K3.4	Explain <b>how to</b> manage <b>stakeholders</b> including: <ul style="list-style-type: none"><li>• <b>clarifying</b> expectations</li><li>• <b>delivering</b> on expectations</li></ul>
K3.5	Explain how to follow the <b>principles</b> of stakeholder management

Indicative assessment criteria	
Processes	
K7.1	Describe how to <b>consistently</b> follow the organisation's processes
K7.2	Outline how to make suggestions for <b>small</b> improvements and support on successful implementation
K7.3	Describe how to follow organisational processes and <b>promote</b> adherence and improvements to them
K7.4	Identify <b>inefficiencies</b> or <b>ineffectiveness</b> in a process and support on successful implementation of <b>rectification</b>

Indicative assessment criteria	
IT	
S1.4	Use <b>IT packages</b> to perform tasks relevant to own role without supervision

Indicative assessment criteria	
Decision making	
S3.1	Decisions are thought through, using a <b>range</b> of information to make a <b>sound</b> judgement
S3.2	Challenges appropriately and is polite when doing so
S3.3	Exercises <b>sound</b> judgement when asking for advice by choosing the appropriate time, manner and person
S3.4	Decisions are <b>timely</b> and <b>consistently</b> show good judgement
S3.5	Decisions are <b>continuously</b> made by thoughtfully considering <b>different</b> information and the risks of any action
S3.6	Decisions are <b>fully</b> evidenced and <b>justifiable</b>
S3.7	<b>Consistently</b> behaves and seeks advice in a mature way

Indicative assessment criteria	
Interpersonal skills	
S4.1	Works effectively with a <b>range</b> of people
S4.2	<b>Influences</b> and <b>challenges</b> peers when necessary
S4.3	Supports others in the organisation and demonstrates coaching skills
S4.4	<b>Influence</b> managers as well as peers
S4.5	Constructively <b>challenge</b> managers, as well as peers, when necessary
S4.6	<b>Proactively</b> offer coaching to others, providing relevant feedback

Indicative assessment criteria	
Communications	
S5.6	Show flexibility to <b>different</b> situations
S5.7	<b>Consistently</b> answers queries from <b>both</b> inside and outside of the organisation in a confident way

Indicative assessment criteria	
Planning and organisation	
S7.7	Shares areas to improve plans with others
S7.8	<b>Improve</b> the management of resources, e.g. identify cost savings or process improvements
S7.9	Make suggestions for improvements to working practice showing understanding of implications beyond immediate environment

Indicative assessment criteria	
Project management	
S8.1	Effectively plan and manage <b>small</b> projects
S8.2	Able to lead <b>small</b> projects when required
S8.3	Plan and manage a <b>significant</b> project and describe what made it a success

Indicative assessment criteria	
Responsibility	
B5.7	Develop their own skills and behaviours
B5.8	<b>Proactively</b> seeks opportunities to develop themselves and <b>share</b> this learning with others

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