



Highfield Level 2 End-Point Assessment for ST0753 Express Delivery Sortation Hub Operative

End-Point Assessment Kit



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EPA kit

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How to use this EPA kit

Welcome to the Highfield end-point assessment kit for the Express Delivery Sortation Hub Operative 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 Express Delivery Sortation Hub Operative 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.

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 ways in which an apprentice may be prepared for their assessments, but trainers may find them to be a helpful starting point.

Key facts

Apprenticeship standard:	Express Delivery Sortation Hub Operative
Level:	2
On-programme duration:	Minimum of 12 months
End-point assessment window:	Typically 4 months
Grading:	Pass/distinction
End-point assessment methods:	Multiple-choice test, observation with questions, interview

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 the logistics sector and provides the centralised support that enables the rapid distribution of goods in transit to and from couriers and postal services. Employers in this sector provide the vital link between those sending and receiving a wide range of letters, parcels, packets and other packages.

A few sortation hubs have direct rail links, but the majority rely on the national road network for distribution. The work is always highly organised and often uses the latest technological solutions, as sortation hubs can process millions of items each day. Sortation hub operatives often work for employers that have national coverage, though some are smaller and more specialist and could focus on certain types of goods.

The broad purpose of the occupation is to contribute to the successful processing of items within the expected timeframe. Sortation hub operatives receive, assess and sort goods by destination. These goods are then collected for 'final mile' delivery. Goods are typically small enough for manual handling, and could be almost anything, from online shopping orders intended for home delivery through to business-to-business sales. Sortation hub operatives are vital, therefore, in ensuring the smooth running of these complex, often automated operations.

Sortation hub operatives do not store or deliver goods themselves. Instead, they provide an express service, turning around the distribution of these goods to couriers/postal services and other road transport operators at great speed, often within a few hours of receipt. They usually work shifts, which quite commonly includes some unsociable hours.

An employee in this occupation will be responsible for completing their own work to specification, with minimal supervision, ensuring they meet set deadlines. Sortation hub operatives are responsible for maintaining their own workspace, and responsible for operating highly technical, specialist equipment. Depending on the type of employer, this could involve loading/unloading goods using booms (that reach for parcels in trucks) or cages, operating multi-level belt sorters, automated chutes and using sophisticated IT systems.

They are responsible for meeting quality requirements and working compliantly to their own organisation's procedures. They must also work in accordance with health and safety considerations. They will typically maintain and clean machinery and fix minor jams. They will respond to incidents and emergencies, such as damage to parcels, but will escalate more significant issues that are beyond their own responsibility. Sortation hub operatives tend to work in teams where everyone has a specialist task, and they all work together in order to complete their shared goals.

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 Express Delivery Sortation Hub Operative 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 and interview (for example, provision of recordings of interviews).

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. This should ensure that the apprentice is sufficiently prepared to undertake the end-point assessment.

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.

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 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 4-month end-point 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

The assessment methods can be delivered in any order.

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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 (2022)

<https://www.instituteforapprenticeships.org/apprenticeship-standards/express-delivery-sortation-hub-operative-v1-0>

End-point assessment plan (2022 ST0753/AP01)

https://www.instituteforapprenticeships.org/media/5727/st0753_express_delivery_sortation_hub_operative_l2_epa.pdf

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 the 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

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, for example, employee ID card or travel card

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The Express Delivery Sortation Hub Operative apprenticeship standard

The following pages contain the Express Delivery Sortation Hub Operative apprenticeship standard and the assessment criteria in a format that is suitable for delivery.

Multiple-choice test	
Knowledge	
K1	Last mile and different types of express delivery models
K8	Range of labels and the instructions for use in sortation
K9	Techniques to match service cost to size, weight and volume
K16	UK postal regulations and universal service obligation
K17	Data protection legislation and how this applies to sortation
K18	Health and safety legislation and how this applies to sortation
K21	Techniques for maintaining the integrity of mail, packages, packets and parcels
Amplification and guidance	
	<ul style="list-style-type: none">• Last mile:<ul style="list-style-type: none">○ Delivery from a transportation hub to the final destination○ Time critical delivery○ Goals of last mile delivery such as costs and efficiency○ Benefits of last mile delivery such as increased delivery speed • Express delivery models:<ul style="list-style-type: none">○ Examples:

- same day delivery
- overnight delivery
- next-day delivery
- delivery before 10am
- delivery before 1pm
- delivery by different transportation methods
- reverse logistics
- click and collect
- various employee models in express delivery such as full-time, part-time, employed, self-employed and agency
- Benefits:
 - real-time data
 - proof of delivery methods
 - better courier communications
 - live estimated time of arrival (ETA)
 - better understanding of customer satisfaction
 - detailed reporting and analysis
 - manage expectations and provide customer transparency

- **Range of labels and the instructions:**

- Shipping labels including tracking numbers, full address, correct post code, date, package quantity, dimensions, bar codes and so on
- Address label
- Hazardous labels indicating contents
- Fragile labels
- Recorded delivery labels
- Special delivery labels
- Re-directed post labels
- Barcodes

- International labels and instructions
- Grade labels
- Specific customer instructions
- UN-number labels
- Different systems for sortation such as tilt and crossbelt sorters
- Techniques used for sorting parcels

- **Techniques to match service cost:**

- Pricing strategies including the 3 Cs (costs, consumers and competitors)
- Factors that impact the price of services such as labour costs and customer demand
- Weight and size limits for mail
- Overweight and oversized parcels
- Different delivery options for the different types of mail
- Calculating the size, weight and volume of parcels
 - dimensional weight
 - dimensional weight formula: length x width x height ÷ 5000
 - billable weight
 - actual weight
 - dimensions of a parcel
 - classifications of letters and parcels such as small, medium and large

- **UK postal regulations:**

- Ofcom regulates the UK postal service
- Prohibited and restricted goods
- Postal Services Act
- General Data Protection Regulation (GDPR) and confidentiality regulations

- **Universal service obligation:**
 - Universal postal service
 - Requirements outlined by the universal service obligation including providing an end-to-end delivery service
 - Postcodes

- **Data protection legislation:**
 - General Data Protection Regulation (GDPR)
 - The Data Protection Act

- **Health and safety legislation:**
 - Health and Safety at Work etc. Act
 - Manual Handling Operations Regulations
 - 5 steps to risk assessment:
 - identify hazards
 - assess the risks
 - control the risks
 - record your findings
 - review the controls
 - Hazards and risks in the workplace
 - Provision and Use of Work Equipment Regulations (PUWER)
 - Guidelines for maintaining equipment and machinery
 - Guidelines for reporting defects/faults to equipment and machinery
 - Terrain assessments
 - The Personal Protective Equipment at Work Regulations
 - Correct personal protective equipment (PPE) and maintenance
 - Staying alert, consideration of your surroundings
 - Keeping yourself and your team safe

- Reporting of any suspicious items or activity
 - Reporting of Injuries, Diseases and Dangerous Occurrences Regulations (RIDDOR)
 - Accident book recording
 - Responsibilities of employees and employer
 - International Carriage of Dangerous Goods by Road (ADR)
 - Reporting procedures for suspicious activity around mail/parcels and packages
- **Techniques for maintaining the integrity:**
 - Postal Services Act
 - Security of mail, packages and parcels
 - Protection from damage, loss or theft
 - Consideration of external threats
 - Consideration of internal threats such as a colleague intentionally damaging items or opening mail/packages
 - Reporting procedures for suspicious activity around mail/parcels and packages

Receiving and matching items for sortation

Knowledge	Skills	Behaviours
<p>K4 Machinery operating procedures including sortation belts, chutes, York roll containers, drop bags, mail bags, mail cages, and boom loaders.</p> <p>K5 Manual handling and mechanical handling techniques for different types of goods. Techniques for selecting the safest option applicable to the circumstances.</p>	<p>S1 Unload and load items using the correct equipment. For example this may involve cages, bags or booms.</p>	<p>B1 Takes ownership of work.</p>

Observation with questions
Criteria covered in observation with questions
RM1 Selects the correct equipment to perform both manual and mechanical loading or unloading of items in accordance with operating procedures (K4, K5, S1, B1)
Amplification and guidance
<ul style="list-style-type: none"> • Different types of goods: <ul style="list-style-type: none"> ○ Hazardous goods ○ Perishable goods ○ Letters ○ Parcels ○ Fragile goods ○ Dimensions of goods – weight, size, shape and so on • Correct equipment: <ul style="list-style-type: none"> ○ Sortation belts ○ Chutes ○ York roll containers ○ Drop bags ○ Mail bags ○ Mail cages ○ Boom loaders ○ Trolleys

Operating sortation equipment

Knowledge	Skills
<p>K7 Terminology and procedures that apply when using dedicated sortation IT equipment and automated sortation systems.</p> <p>K11 Sortation equipment cycles.</p>	<p>S2 Matches items for sortation with the correct manual, mechanical, or automated handling technique.</p> <p>S3 Prepares and operates sortation equipment in line with operating instructions.</p> <p>S6 Respond to data to support the correct flow of automated sortation.</p> <p>S9 Monitor and maintain sortation equipment to the required functionality. For example, the minor adjusting of belts and chutes during a typical shift.</p>
Observation with questions	
Criteria covered in observation with questions	
<p>OS1 Selects, prepares and operates the correct equipment/technique to match the items for sortation in line with procedures (K7, K11, S2, S3)</p> <p>OS2 Monitors sortation of items, both by monitoring and responding to equipment performance, and by adjusting the flow of sortation in light of available IT/machine data (S6, S9)</p> <p>OS3 Monitors automated sorting equipment using data outputs to support any adjustments to the sortation process (S6, S9)</p>	
Amplification and guidance	
<ul style="list-style-type: none"> • Sortation equipment: <ul style="list-style-type: none"> ○ Sortation belts ○ Chutes ○ York roll containers ○ Drop bags ○ Mail bags 	

- Mail cages
- Boom loaders
- Trolleys

Teamwork and compliance

Skills	Behaviours
<p>S15 Coordinate own work with that of others in the team to provide the required sortation tasks.</p> <p>S17 Work compliantly by following relevant health and safety legislation.</p>	<p>B2 Puts safety and security first for themselves and others.</p> <p>B3 Team-focused and works effectively with colleagues and others.</p>
Observation with questions	
Criteria covered in observation with questions	
<p>TC1 Demonstrates team focus when performing sortation, by coordinating own responsibilities with those of others (S15, B3)</p> <p>TC2 Complies with own organisation’s safety and security requirements and health and safety legislation (S17, B2)</p>	
Amplification and guidance	
<ul style="list-style-type: none"> • Relevant health and safety legislation: <ul style="list-style-type: none"> ○ Health and Safety at Work etc. Act ○ 5 steps to risk assessment: <ul style="list-style-type: none"> ▪ identify hazards ▪ assess the risks ▪ control the risks ▪ record your findings 	

- review the controls
 - Guidelines for maintaining equipment and machinery
 - Guidelines for reporting defects/faults to equipment and machinery
 - The Personal Protective Equipment at Work Regulations
 - Correct personal protective equipment (PPE) and maintenance
 - Staying alert, consideration of your surroundings
 - Keeping yourself and your team safe
 - Reporting of any suspicious items or activity
 - Accident book recording
 - Responsibilities of employees and employer

Sortation hub landscape

Knowledge	Skills
<p>K2 The range of different job roles across express delivery, from supplier through to sortation hub and final mile services.</p> <p>K3 The importance of the sortation hub in completing a successful express delivery service.</p> <p>K19 Methods of communication.</p> <p>K20 The principles of working with others in shift patterns.</p>	<p>S5 Adapts own method of communication to the circumstances, using correct sortation terminology.</p>

Interview
To pass, the following must be evidenced.
SH1 Lists at least four different job roles that are involved in a successful express delivery service from the point of collection to delivery (K2, K3, K20)
SH2 Explain why both the role of the sortation hub and working shift patterns are important (K2, K3, K20)
SH3 Explains how they adapt methods of communication to situation and audience using correct sortation terminology where appropriate (K19, S5)
To gain a distinction, the following must be evidenced.
SH4 Explains why all job roles in the express delivery service contribute equally to the success of the operation (K2)
SH5 Describes a time when the communication methods they first considered were later discounted and justifies their reasons (K19, S5)
Amplification and guidance
<ul style="list-style-type: none"> • Range of different job roles: <ul style="list-style-type: none"> ○ Sortation operative ○ Cleaning operative ○ Warehouse operative ○ Parcel sorter ○ Service manager ○ Vehicle technician ○ Post room assistant ○ Postal/delivery worker ○ Customer service • Methods of communication: <ul style="list-style-type: none"> ○ Email ○ Postal digital assistant (PDA)/scanners

- Websites
- Face-to-face
- Positive body language
- Written information/instructions
- Telephone
- Radios
- Social media

- **Sortation terminology:**

- For example:
 - ASAP – advanced sorting and preparation
 - Callers office
 - CDO – city delivery office
 - DO – delivery office
 - ADM – area delivery manager
 - Bundles
 - Miss – sorts
 - Pouch
 - York
 - Trolleys – various terminology used
 - Frames
 - Other related terminology

Best practice		
Knowledge	Skills	Behaviours
K22 Own organisations equality and diversity requirements.	<p>S16 Store and share data only when it is permitted to do so, in line with data protection legislation.</p> <p>S19 Support others by following own organisations equality and diversity requirements.</p>	<p>B4 Committed to keeping up to date with industry best practice.</p> <p>B7 Acts with integrity, following own organisations required standards.</p>
Interview		
To pass, the following must be evidenced.		
<p>BP1 Outlines the organisation’s equality and diversity requirements and gives an example of how they have acted with integrity to apply the requirements to support others (K22, S19, B7)</p> <p>BP2 Explains how they keep up with industry best practice (B4)</p> <p>BP3 Outlines the steps they follow that ensures they store data correctly and only share data when permitted to do so (S16)</p>		
To gain a distinction, the following must be evidenced.		
BP4 Justify the upholding of equality and diversity requirements in the workplace (K22, S19, B4, B7)		
Amplification and guidance		
<ul style="list-style-type: none"> • Equality and diversity: <ul style="list-style-type: none"> ○ Offering equal job opportunities ○ Promoting an inclusive environment ○ Supporting colleagues with different needs and requirements ○ Being a champion for diversity in the workplace ○ Reporting of bullying and harassment 		

- Intervening to support a colleague
- **Data protection legislation:**
 - General Data Protection Regulations (GDPR)
 - Security of mail, packages and parcels
 - Protection from damage, loss or theft
 - Consideration of external threats
 - Consideration of internal threats, could be a colleague intentionally damaging items or opening mail/packages
 - Reporting procedures for suspicious activity around mail/parcels and packages

Operational performance		
Knowledge	Skills	Behaviours
<p>K6 Procedures for collections and returns.</p> <p>K15 The European agreement concerning the international carriage of dangerous goods (ADR). Techniques to apply this legislation within own area of responsibility when working with dangerous goods.</p>	<p>S4 Responds to deliveries, collections and returns in accordance with own organisation procedures and any relevant contractual arrangements.</p> <p>S7 Assess and update labelling where required to support smooth transition through sortation to delivery.</p> <p>S8 Match item cost to delivery service and respond to irregularities. (For example, identifying a large envelope with a regular stamp).</p>	<p>B5 Sources solutions and seeks to continuously improve and develop.</p>

	<p>S11 Create reports on sortation performance, within limits of own role.</p> <p>S14 Identify and handle dangerous goods correctly in accordance with legislative requirements.</p> <p>S18 Maintain the integrity and security of items in line with procedures.</p>	
Interview		
To pass, the following must be evidenced.		
<p>OP1 Outlines the main steps they follow that ensures that both their own organisational procedures and any contractual arrangements are followed when handling the goods they are responsible for (including both deliveries, collections and returns situations) (K6, S4)</p> <p>OP2 Describes the techniques used to apply ADR legislation within their own area of responsibility in the identification and handling of dangerous goods (K15, S14)</p> <p>OP3 Describes an incident where either labelling or item cost was incorrect and how their solution contributed to their continuous improvement and development (S7, S8, B5)</p> <p>OP4 Outlines the steps they follow when creating a report on sortation performance (S11)</p> <p>OP5 Describes the procedures which apply to maintain the integrity and security of items being dealt with by their organisation (S18)</p>		
To gain a distinction, the following must be evidenced.		
<p>OP6 <i>Justifies the need to follow organisational procedures and contractual arrangements when handling deliveries, collections and returns (K6, S4)</i></p> <p>OP7 <i>Assesses the impact of ADR legislation on sortation hub working practices (K15, S14)</i></p> <p>OP8 <i>Explains how their solution to costing or labelling errors could (help or be adopted by) others (S7, S8, B5)</i></p>		

Amplification and guidance

- **The European agreement concerning the international carriage of dangerous goods (ADR):**
 - Compliance with ADR of vehicles and drivers
 - Transportation of dangerous goods
 - Correct labelling of packages, mail, parcels, including description/contents/dimensions
 - Understands any contractual obligations for handling and transporting dangerous goods
 - Impact ADR may have when handling and sortation of goods
 - Understanding what items are prohibited
 - Understanding what items are restricted

- **Dangerous goods:**
 - Understanding what items are prohibited
 - Understanding what items are restricted
 - Understanding associated documentation
 - Correct labelling of items
 - Reporting of any suspicious items
 - Reporting of any damages, missing items

Maintenance, emergencies and incidents

Knowledge	Skills	Behaviours
K10 Cleaning and maintenance protocols. K12 Fault finding principles. K13 Reporting and escalation procedures.	S10 Identify and remedy basic faults in sortation equipment. S12 Identify problems beyond own responsibility and escalate to the relevant person.	B6 Calm under pressure.

K14 Contingency plans.	S13 Follow the contingency procedures that relate to incidents and emergencies. For example, damaged parcels or breakages.	
Interview		
To pass, the following must be evidenced.		
ME1 Outlines the cleaning and maintenance protocols for any one type of sortation equipment (K10, K12, S10)		
ME2 Explains how they identify any problems with equipment and how they ensure that their own remedies to basic faults are to the expected standard (K10, K12, S10)		
ME3 Explains the strategies/techniques they would use to stay calm when they identified a sortation problem where organisational reporting and/or escalation procedures would have to be followed (K13, S12, B6)		
ME4 Outlines the organisation's contingency plans that relate to incidents and emergencies (K14, S13)		
To gain a distinction, the following must be evidenced.		
<i>No distinction criteria</i>		
Amplification and guidance		
<ul style="list-style-type: none"> • Contingency plans: <ul style="list-style-type: none"> ○ Identifying and following procedures for a missing package ○ Identifying and following the procedure for a damaged item ○ Staying calm during an incident or an accident ○ Staying focused if dealing with a sortation problem ○ Applying experience and initiative to resolve problems when appropriate 		

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Assessment summary

The end-point assessment for the Express Delivery Sortation Hub Operative apprenticeship standard is made up of 3 components:

1. 45-minute multiple-choice test consisting of 25 questions
2. 90-minute observation with questions
3. 60-minute interview

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

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

Multiple-choice test

Total marks available are 25.

- To achieve a **pass**, apprentices will score at least 15 out of 25
- To achieve a **distinction**, apprentices must score at least 20 out of 25
- **Unsuccessful** apprentices will have scored 14 or below

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

Observation with questions

The observation with questions is graded at pass only. Apprentices will be marked against the pass criteria outlined in this kit.

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

Interview

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

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 3 assessment methods.

To achieve a distinction, the apprentice must achieve a distinction in the multiple-choice test and the interview and a pass in the observation with questions.

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

Multiple-choice test	Observation with questions	Interview	Overall grade awarded
Fail any of the 3 assessment methods			Fail
Pass	Pass	Pass	Pass
Distinction	Pass	Pass	Pass
Pass	Pass	Distinction	Pass
Distinction	Pass	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 2 months of the EPA outcome notification. The timescale for a retake will be dependent on how much retraining is required but is typically taken within 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 a 7-month period, 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 multiple-choice test

The test consists of 25 multiple-choice questions and will last 45 minutes. The **pass** mark is 15 out of 25 and the **distinction** mark is 20 out of 25.

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

Before the assessment

The employer/training provider should:

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

Multiple-choice test criteria

Multiple-choice test

- K1** Last mile and different types of **express delivery models**
- K8** Range of **labels and the instructions** for use in sortation
- K9** Techniques to match service cost to size, weight and volume
- K16** UK postal regulations and universal service obligation
- K17** Data protection legislation and how this applies to sortation
- K18** Health and safety legislation and how this applies to sortation
- K21** Techniques for maintaining the integrity of mail, packages, packets and parcels

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Assessing the observation with questions

The assessor will observe the apprentice undertaking work as part of their normal duties in the workplace and ask questions. The observation will be of the apprentice completing their usual work and simulation is not permitted. The assessor will only observe 1 apprentice at any one time. The apprentice must be given at least 2 weeks' notice of the date and time of the observation with questions.

The observation with questions will last a total of 90 minutes, with 75 minutes for the observation followed by 15 minutes allocated for questions. The 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 comfort breaks as necessary and to allow the apprentice to move from 1 location to another where required. Breaks will not count towards the total assessment time.

The 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 workplace. The venue must be a sortation hub that receives, sorts and exports different types of goods such as letters and small parcels. It must include a range of manual and automated sortation equipment.

The following activities must be observed during the observation:

- loading and unloading of goods to/from the sortation hub
- transferring goods to sortation equipment
- operating sortation equipment to process goods
- following all safety and security and compliance procedures
- collaborating with workers in the team in order to complete the sortation tasks

Questions will be asked after the observation to assess the apprentice's breadth and depth of competence against the grading descriptors. As only naturally occurring work will be observed, the criteria that the apprentice did not have the opportunity to demonstrate will be assessed through questioning. The assessor will ask a **minimum of 5 questions**. Follow-up questions will be asked where required.

Before the assessment:

Employers/training providers should:

- ensure the apprentice knows the date, time and location of the assessment
- ensure the apprentice knows which express delivery sortation hub operative 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

The observation with questions is graded at a pass only. 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
- **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 interview should take place in a suitable location.
- a 90-minute 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 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:
 - receiving and matching items for sortation
 - How would you load or unload heavy parcels?
 - operating sortation equipment
 - Tell me about a time you have had to adjust the flow of sortation based on the available data.
 - teamwork and compliance
 - Tell me about a time you resolved a sortation problem with your team.

Observation with questions criteria

Throughout the 90-minute observation with questions, the 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.

Receiving and matching items for sortation

To pass, the following must be evidenced.

RM1 Selects the correct equipment to perform both manual and mechanical loading or unloading of items in accordance with operating procedures (K4, K5, S1, B1)

Operating sortation equipment

To pass, the following must be evidenced.

OS1 Selects, prepares and operates the correct equipment/technique to match the items for sortation in line with procedures (K7, K11, S2, S3)

OS2 Monitors sortation of items, both by monitoring and responding to equipment performance, and by adjusting the flow of sortation in light of available IT/machine data (S6, S9)

OS3 Monitors automated sorting equipment using data outputs to support any adjustments to the sortation process (S6, S9)

Team work and compliance

To pass, the following must be evidenced.

TC1 Demonstrates team focus when performing sortation, by coordinating own responsibilities with those of others (S15, B3)

TC2 Complies with own organisation's safety and security requirements and health and safety legislation (S17, B2)

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Assessing the interview

The interview will consist of the independent assessor asking the apprentice a series of questions to assess their competence against the relevant criteria outlined in this kit. The independent assessor leads this process to obtain information from the apprentice. It is not a 2-way discussion. Employers are allowed to be present, however, this is optional. Apprentices are allowed to refer to their notes during the interview.

The apprentice must be given at least 10 days' notice of the date and time of the interview. It will take place in a suitable environment and can be conducted by video conferencing and will last for 60 minutes. The independent assessor can increase the time of the interview by up to 10% to allow the apprentice to complete their last answer.

There will be a **minimum of 12 questions**. This is broken down into 3 questions for each of the following themes:

- sortation hub landscape
- best practice
- operational performance
- maintenance, emergencies and incidents

Follow-up questions may be asked to probe replies further or to seek clarification or rationale.

Apprentices are expected to understand and use relevant occupational language that would be typical of a competent person in this occupation.

Before the assessment:

Employers/training providers should:

- ensure the apprentice knows the date, time and location of the assessment
- ensure the apprentice knows which criteria will be assessed (outlined on the following pages)
- encourage the apprentice to reflect on their experience and learning on-programme to understand what is required to meet the standard
- be prepared to provide clarification to the apprentice, and signpost them to relevant parts of their on-programme experience as preparation for this assessment

Grading the interview

Apprentices will be marked against the pass and distinction criteria included in the tables on the following pages (under 'Interview 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 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 in preparation for the real thing. The most appropriate form of mock interview 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 should take place in a suitable location.
- a 60-minute time slot should be available to complete the interview, 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 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:
 - sortation hub landscape
 - Explain the structure of your organisation including the different job roles involved in express delivery.
 - How would you adapt your methods of communication based on the situation and audience?

- best practice
 - What are your organisation's equality and diversity requirements and how are these upheld?
 - How do you ensure that you are correctly storing and sharing data?
- operational performance
 - Give me an example of when you have identified a labelling problem. How was this resolved?
 - Tell me about a time you have applied ADR legislation when handling dangerous goods.
- maintenance, emergencies and incidents
 - How do you report a defect to equipment?
 - How do you ensure the sortation equipment is kept clean and well maintained?

Interview criteria

Throughout the 60-minute interview, the assessor will review the apprentice's competence in the criteria outlined below.

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

Sortation hub landscape
To pass, the following must be evidenced.
SH1 Lists at least four different job roles that are involved in a successful express delivery service from the point of collection to delivery (K2, K3, K20)
SH2 Explain why both the role of the sortation hub, and working shift patterns, are important (K2, K3, K20)
SH3 Explains how they adapt methods of communication to situation and audience using correct sortation terminology where appropriate (K19, S5)
To gain a distinction, the following must be evidenced.
SH4 Explains why all job roles in the express delivery service contribute equally to the success of the operation (K2)
SH5 Describes a time when the communication methods they first considered were later discounted and justifies their reasons (K19, S5)

Best practice
To pass, the following must be evidenced.
BP1 Outlines the organisation's equality and diversity requirements and gives an example of how they have acted with integrity to apply the requirements to support others (K22, S19, B7)
BP2 Explains how they keep up with industry best practice (B4)
BP3 Outlines the steps they follow that ensures they store data correctly and only share data when permitted to do so (S16)
To gain a distinction, the following must be evidenced.
BP4 Justify the upholding of equality and diversity requirements in the workplace (K22, S19, B4, B7)

Operational performance

To pass, the following must be evidenced.

- OP1** Outlines the main steps they follow that ensures that both their own organisational procedures and any contractual arrangements are followed when handling the goods they are responsible for (including both deliveries, collections and returns situations) (K6, S4)
- OP2** Describes the techniques used to apply ADR legislation within their own area of responsibility in the identification and handling of dangerous goods (K15, S14)
- OP3** Describes an incident where either labelling or item cost was incorrect and how their solution contributed to their continuous improvement and development (S7, S8, B5)
- OP4** Outlines the steps they follow when creating a report on sortation performance (S11)
- OP5** Describes the procedures which apply to maintain the integrity and security of items being dealt with by their organisation (S18)

To gain a distinction, the following must be evidenced.

- OP6** *Justifies the need to follow organisational procedures and contractual arrangements when handling deliveries, collections and returns (K6, S4)*
- OP7** *Assesses the impact of ADR legislation on sortation hub working practices (K15, S14)*
- OP8** *Explains how their solution to costing or labelling errors could (help or be adopted by) others (S7, S8, B5)*

Maintenance, emergencies and incidents

To pass, the following must be evidenced.

- ME1** Outlines the cleaning and maintenance protocols for any one type of sortation equipment (K10, K12, S10)
- ME2** Explains how they identify any problems with equipment and how they ensure that their own remedies to basic faults are to the expected standard (K10, K12, S10)
- ME3** Explains the strategies/techniques they would use to stay calm when they identified a sortation problem where organisational reporting and/or escalation procedures would have to be followed (K13, S12, B6)
- ME4** Outlines the organisation's contingency plans that relate to incidents and emergencies (K14, S13)

To gain a distinction, the following must be evidenced.

No distinction criteria

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