

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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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.

Key facts

Apprenticeship standard:	Business Administrator
Level:	3
On-programme duration:	Minimum of 12 months
EPA window duration:	Typically, within 3 months
Grading:	Pass/distinction
End-point assessment duration:	Usually within 3 months
End-point assessment methods:	Knowledge test, portfolio-based interview, project presentation

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

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

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.

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

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

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

Additional, relevant on-programme qualification

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

Readiness for end-point assessment

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 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

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 (ST0070, 2017):

<https://www.instituteforapprenticeships.org/apprenticeship-standards/business-administrator/>

End-point assessment plan (AP02, 2019):

https://www.instituteforapprenticeships.org/media/2878/st0070_business-admin_l3_ap-for-publication-2-april-2019-update-to-eqap.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

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

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

- customer feedback
- recordings
- manager statements
- witness statements

As well as evidence from others, such as:

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

In advance of gateway, apprentices will need to have:

- achieved Level 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:

- **purpose**
- aims
- ways of working

K1.2 Describe how to apply the above in the **context** of the local (or sector) environment

K1.3 Demonstrate a **thorough understanding** of the organisation's:

- **purpose**
- aims
- ways of working

Knowledge test

Indicative assessment criteria

K1.4 Describe the purpose and vision of the organisation

K1.5 Explain how the **wider political** and **economic** 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 **structure** of the organisation

K2.2 Explain **how own work contributes** to the organisation

K2.3 Explain how **different** teams support each other

K2.4 Explain how to **promote** the value of their work and how this contributes to the organisation

Project presentation

Indicative assessment criteria

K2.5 Identify their **role** within the team

K2.6 Identify the **value** of their skills

K2.7 Analyse their skills, **compared with others**

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 **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.

Portfolio interview

Indicative assessment criteria

K3.1 Explain **how to work with stakeholders to achieve results**

K3.2 Describe how to liaise with the following customers:

- internal
- external
- suppliers
- stakeholders inside or outside the UK

K3.3 Explain how to go **beyond expectations** to build constructive relationships with stakeholders

Project presentation

Indicative assessment criteria

K3.4 Explain **how to** manage **stakeholders** including:

- **clarifying** expectations
- **delivering** on expectations

K3.5 Explain how to follow the **principles** of stakeholder management

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

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 relevant laws and regulations that apply to their role including: <ul style="list-style-type: none"> • data protection • health and safety • compliance
Portfolio interview	
Indicative assessment criteria	
K4.2	Outline relevant laws and regulations and how to consistently follow them
K4.3	Demonstrate a thorough knowledge of relevant laws and regulations and how to consistently follow them
K4.4	Describe how to champion adherence to relevant laws and regulations within the organisation
Amplification and guidance	
Relevant laws and regulations <ul style="list-style-type: none"> • Equality Act 2010 • Employment Rights Act 1996 • Employment Relations Act 2004 • Contracts of Employment • Data Protection Act 1998 	

- Copyright, Designs and Patent Act 1988
- Freedom of Information Act 2000
- Health and Safety Legal obligations
- The Health and Safety at Work etc. Act 1974
- The Management of Health and Safety at Work Regulations 1999
- Workplace (Health, Safety and Welfare) Regulations 1992
- The Health and Safety (Display Screen Equipment) Regulations 1992
- The Provision and Use of Workplace Equipment Regulations (PUWER) 1998
- The Regulatory Reform (Fire Safety) Order 2005
- 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 internal policies and key business policies relating to sector.	
Portfolio interview	
Indicative assessment criteria	
K5.1	Describe how to follow the organisation's internal policies
K5.2	Describe how to promote the organisation's internal policies including key business policies relating to sector
Amplification and guidance	
<p>Internal policies:</p> <ul style="list-style-type: none"> • employee conduct • equality and diversity • attendance and time off • dress code • computer use - internet access, social media use • substance abuse <p>Follow: must be able to demonstrate that they have followed relevant policies/procedures</p> <p>Promote: makes known to the team</p> <p>Key business policies: 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 applicability of business principles
K6.2	Describe the fundamentals of business finance
K6.3	Describe the fundamentals of managing change
K6.4	Describe the fundamentals of project management
Amplification and guidance	
<p>Applicability: appropriateness, validity, relationship, relevancy, opportunity cost, quality standards, control, assurance</p> <p>Business principles: e.g. corporate governance, quality assurance, quality control, internal quality standards, opportunity cost, time management and marketing (and the 4Ps)</p> <p>Fundamentals: basics, essentials, the key principles</p> <p>Business finance:</p> <ul style="list-style-type: none"> • balance sheets • breakeven • budgets 	

- 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 **consistently** follow the organisation's processes

K7.2 Outline how to make suggestions for **small** improvements and support on successful implementation

K7.3 Describe how to follow organisational processes and **promote** adherence and improvements to them

K7.4 Identify **inefficiencies** or **ineffectiveness** in a process and support on successful implementation of **rectification**

Amplification and guidance

Consistently: learners need to show they have reliably and constantly followed organisational processes and be able to give 3 examples

Small: minor

Promotes: publicises, makes it known

Inefficiencies: wastefulness, shortfalls, failures, faults

Ineffectiveness: not practical, unworkable, inadequate

Rectification: fixing or correcting a problem

External environment factors

Knowledge

Understands relevant **external factors**, e.g. market forces, policy and regulatory changes, supply chain, etc. and the wider business impact. Where necessary understands the **international/global market** in which the employing organisation is placed.

Knowledge test

Indicative assessment criteria

- K8.1 Describe relevant **external factors**:
- market forces
 - policy and regulatory changes
 - supply chain

Portfolio interview

Indicative assessment criteria

- K8.2 Identify **external factors** affecting the organisation
- K8.3 Describe how **external factors relate** to own role
- K8.4 Demonstrate a deep understanding of the **external factors** facing the organisation
- K8.5 Describe the placement of the organisation within the **international/global market** (where necessary)

Amplification and guidance

International/global market: buying or selling goods and services throughout the world

External factors:

- 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	
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.	
Portfolio interview	
Indicative assessment criteria	
S1.1	Use IT packages , specifically to: <ul style="list-style-type: none"> • write letters or emails • record and analyse information
S1.2	Consistently demonstrate use of IT packages, providing: <ul style="list-style-type: none"> • varied examples • quality examples
S1.3	Coach others in the use of IT
Project presentation	
Indicative assessment criteria	
S1.4	Use IT packages to perform tasks relevant to own role without supervision
Amplification and guidance	
IT packages 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.	

- **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 **accurate** 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 **accurate**, and **rarely** 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 **minor improvements**
- S2.4 Support others with the production of documents
- S2.5 Ensure that records are **consistently accurate** and confidential
- S2.6 Recommend **insightful** improvements that result in a **clear benefit** to the organisation
- S2.7 Coach others and provide relevant feedback

Amplification and guidance

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.

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 **range** of information to make a **sound** judgement

S3.2 Challenges appropriately and is polite when doing so

S3.3 Exercises **sound** judgement when asking for advice by choosing the appropriate time, manner and person

S3.4 Decisions are **timely and consistently** show good judgement

S3.5 Decisions are **continuously** made by thoughtfully considering **different** information and the risks of any action

S3.6 Decisions are **fully** evidenced and **justifiable**

S3.7 **Consistently** behaves and seeks advice in a mature way

Amplification and guidance

Range:

Learners need to demonstrate the use of **three** different information sources:

- reports
- charts
- databases
- policies and procedures
- discussion

- 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 **influence** and **challenge** 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 **range** of people
- S4.2 **Influences** and **challenges** peers when necessary
- S4.3 Supports others in the organisation and demonstrates coaching skills
- S4.4 **Influence** managers as well as peers
- S4.5 Constructively **challenge** managers, as well as peers, when necessary
- S4.6 **Proactively** offer coaching to others, providing relevant feedback

Amplification and guidance

Influence: learners will need to show they have used their skills to sway, encourage, persuade, prompt, inspire, guide others

Challenge: learners will need to show they have used their skills to contest, dispute and question others in a professional manner

Range: learners will need to demonstrate they have effectively worked with **three** of the following:

- clients
- customers
- managers

- 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 **communication channels** dependent on the subject matter
- S5.4 Communication is **consistently** clear, both written and verbally
- S5.5 Champions an appropriate choice of **communication channels**

Project presentation

Indicative assessment criteria

- S5.6 Show flexibility to **different** situations
- S5.7 **Consistently** answers queries from **both** 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 **Checks** own work before submission and makes improvements
- S6.2 Produce work that is **largely** accurate and meets expectations
- S6.3 Identify areas for improvement and can **justify** why
- S6.4 Promote best practice examples of administration, such as **accurate** records
- S6.5 Take ownership for work and **apply** processes to check it
- S6.6 Produce work that is **consistently accurate** and meets the agreed outcomes
- S6.7 Identify, recommend and implement process improvements
- S6.8 **Proactively coach** 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 improve plans with others
S7.8	Improve 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	
Plans: prepares, arranges, organises, works out	
Maximise: make the most of, take advantage of, get the best out of	
Proactive: learners will need to demonstrate that they have acted in advance of a future activity	
Responsibility for areas of logistics: this should be demonstrated with examples of excellent implementation of this	
Improves: enhances, make better, adjusts, develops, perfects	

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

- 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 **Regularly** show:

- integrity
- reliability
- positivity
- self-motivation

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

- integrity
- reliability
- positivity
- self-motivation

Amplification and guidance

Regularly: learners will need to show they have repeatedly behaved using **all** the qualities listed.

Always: learners will need to show they have behaved, without fail, using **all** the qualities listed.

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 **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

Amplification and guidance

Clarifies: explained, simplified, made clear

Right level of quality: 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 **Accept** personal responsibility for their own work
- B5.2 **Deliver** their work **on time** and to the **right level of quality**
- 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 **role model** who takes personal responsibility for themselves and peers
- B5.6 Aims to deliver work **within targets** and **deliver more than required in their role**

Project presentation

Indicative assessment criteria

- B5.7 Develop their own skills and behaviours
- B5.8 **Proactively** seeks opportunities to develop themselves and **share** 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

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

Portfolio interview

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

Project presentation

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

Grading

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

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

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

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

The apprentice will	Criteria covered in the knowledge test
The organisation	
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.	K1.4 Describe the purpose and vision of the organisation K1.5 Explain how the wider political and economic environment can affect the organisation

The apprentice will	Criteria covered in the knowledge test
Stakeholders	
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.	K3.6 Identify methods of stakeholder management K3.7 Describe the differing stakeholder relationships to an organisation including: <ul style="list-style-type: none"> • internal customers • external customers • clients and/or suppliers

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

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

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

The apprentice will	Criteria covered in the knowledge test
Project management	
<p>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.</p>	<p>S8.4 Identify project management tools and principles</p> <p>S8.5 Describe strong leadership skills when managing a project</p> <p>S8.6 Understands and is able to apply a strong grasp of project management tools and principles</p>

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Assessing the portfolio interview

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

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

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:
- **purpose**
 - aims
 - ways of working
- K1.2 Describe how to apply the above in the **context** of the local (or sector) environment
- K1.3 Demonstrate a **thorough understanding** of the organisation's:
- **purpose**
 - aims
 - ways of working

Value of their skills

Indicative assessment criteria

- K2.1 Describe the **structure** of the organisation
- K2.2 Explain **how own work contributes** to the organisation
- K2.3 Explain how **different** 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 **work with** stakeholders to **achieve results**
- K3.2 Describe how to liaise with the following customers:
- internal
 - external
 - suppliers
 - stakeholders inside or outside the UK
- K3.3 Explain how to go **beyond expectations** to build constructive relationships with stakeholders

Relevant regulation

Indicative assessment criteria

- K4.2 Outline **relevant laws and regulations** and how to **consistently** follow them
- K4.3 Demonstrate a **thorough** knowledge of **relevant laws and regulations** and how to **consistently** follow them
- K4.4 Describe how to **champion adherence** to **relevant laws and regulations** within the organisation

Policies

Indicative assessment criteria

K5.1 Describe how to **follow** the organisation's internal policies

K5.2 Describe how to **promote** the organisation's internal policies including **key business policies** relating to sector

External environment factors

Indicative assessment criteria

K8.2 Identify **external factors** affecting the organisation

K8.3 Describe how **external factors relate** to own role

K8.4 Demonstrate a deep understanding of the **external factors** facing the organisation

K8.5 Describe the placement of the organisation within the **international/global market** (where necessary)

IT

Indicative assessment criteria

- S1.1 Use **IT packages**, specifically to:
- **write letters or emails**
 - **record and analyse information**
- S1.2 **Consistently** demonstrate use of IT packages, providing:
- **varied** examples
 - quality examples
- S1.3 **Coach others** in the use of IT

Record and document production

Indicative assessment criteria

- S2.1 Ensure that records are **accurate**, and **rarely** 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 **minor improvements**
- S2.4 Support others with the production of documents
- S2.5 Ensure that records are **consistently accurate** and confidential
- S2.6 Recommend **insightful** improvements that result in a **clear benefit** 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 **communication channels** dependent on the subject matter
- S5.4 Communication is **consistently** clear, both written and verbally
- S5.5 Champions an appropriate choice of **communication channels**

Quality

Indicative assessment criteria

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

Indicative assessment criteria

- B5.1 **Accept** personal responsibility for their own work
- B5.2 **Deliver** their work **on time** and to the **right level of quality**
- 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 **role model** who takes personal responsibility for themselves and peers
- B5.6 Aims to deliver work **within targets** and **deliver more than required in their role**

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Assessing the project presentation

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

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

Indicative assessment criteria

Value of their skills

- K2.5 Identify their **role** within the team
- K2.6 Identify the **value** of their skills
- K2.7 Analyse their skills, **compared** with **others**

Indicative assessment criteria

Stakeholders

- K3.4 Explain **how to** manage **stakeholders** including:
- **clarifying** expectations
 - **delivering** on expectations
- K3.5 Explain how to follow the **principles** of stakeholder management

Indicative assessment criteria

Processes

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

Indicative assessment criteria

IT

- S1.4 Use **IT packages** to perform tasks relevant to own role without supervision

Indicative assessment criteria

Decision making

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

Indicative assessment criteria

Interpersonal skills

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

Indicative assessment criteria

Communications

- S5.6 Show flexibility to **different** situations
- S5.7 **Consistently** answers queries from **both** 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	Improve 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 small projects
S8.2	Able to lead small projects when required
S8.3	Plan and manage a significant project and describe what made it a success

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

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