Highfield Level 3 End-Point Assessment for Business Administrator

EPA-kit

Assessing the Portfolio Interview

- The portfolio interview - guidance
- The portfolio interview - mock assessment
- The portfolio interview - matrix sheet
- Portfolio interview criteria

The portfolio interview - guidance

The interview is 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.

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 pass and distinction 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 the 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 later in this guide 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?'

The portfolio interview - matrix sheet

This document should be used to map the apprentice's portfolio to the Business Administrator standards and should accompany the portfolio when submitted to Highfield Assessment.

Apprentice's Name:	
Employer:	
Training Provider:	
End-Point Assessment Start Date:	

Ref	Assessment Criteria *Distinction criteria are indicated in italics*	Evidence Ref	Location/ Page in Evidence
	The organisation		
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*** • *ways of working*		
	Value of their skills		
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		
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*		

Ref	Assessment Criteria *Distinction criteria are indicated in italics*	Evidence Ref	Location/ Page in Evidence
	Relevant regulation		
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		
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		
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		
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		
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			
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			
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			
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			
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			
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			
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			
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			
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***		

Apprentice Declaration

I confirm that the evidence I have provided has been produced and authenticated in accordance with the assessment specification for this end-point assessment and that the assessment was carried out under the specific conditions for the end-point assessment.

Apprentice's signature:	**Date:**

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	**Distinction 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** • ways of working

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

Personal qualities	
Indicative assessment criteria	***Distinction 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	***Distinction 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	***Distinction 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	***Distinction 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**