

# Highfield Level 3 End-point Assessment for Business Administrator

## End-Point Assessment Kit



# Highfield Level 3 End-Point Assessment for 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, assessment plan version AP03.

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.highfieldproducts.com/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

<b>Apprenticeship standard:</b>	Business Administrator
<b>Level:</b>	3
<b>On-programme duration:</b>	Minimum of 12 months
<b>EPA window duration:</b>	Typically, within 3 months
<b>Grading:</b>	Pass/distinction
<b>End-point assessment methods:</b>	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

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

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

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

## On-programme requirements

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Although learning, development and on-programme assessment are 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.

### **Portfolio of learning**

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

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

### **Project**

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.

- This could be a project they have completed or a process they have improved.
- A project or process improvement should account for 21 to 35 working hours over the apprenticeship, to adequately apply themselves.
- It 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.

## **Additional, relevant on-programme qualification**

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

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

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

- they must have successfully completed the Level 2 English and maths components of the apprenticeship.
- the 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 portfolio must be completed and submitted to Highfield at gateway.
- the project must be completed and submitted to Highfield at gateway.

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.

## **Order of end-point assessments**

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The knowledge test should typically be the first assessment component undertaken and passed.

The portfolio and project will be submitted at gateway. 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-based 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, 2019):

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

End-point assessment plan (AP03, 2020):

[https://www.instituteforapprenticeships.org/media/4504/st0070\\_business-admin\\_l3\\_ap-for-publication\\_100920.pdf](https://www.instituteforapprenticeships.org/media/4504/st0070_business-admin_l3_ap-for-publication_100920.pdf)

## Specific considerations

The assessment criteria used for the portfolio-based interview and project presentation have been taken from the assessment plan. The assessment criteria used for the knowledge test have been written by Highfield and are based on the criteria from the assessment plan.

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, some criteria within the assessment plan are open for assessment by multiple assessment methods.

Where criteria are open for assessment in both the portfolio-based interview and project presentation methods, we have allowed the apprentice to cover the criteria within either the project presentation or the portfolio-based interview. However, to allow the apprentice the best opportunity to cover all criteria sufficiently, we have recommended that at least 50% of the 'either/or' criteria are covered within the project presentation and ideally more. This then reduces the amount of criteria to be 'mopped up' during the portfolio-based interview.

Where criteria are open for assessment between the knowledge test and either of the other assessment methods Highfield has determined which criteria must be covered during the knowledge test, and which must be covered in either the portfolio-based interview or project

presentation, as it is not possible for individual criteria requiring further evidence to be identified and carried over from the knowledge test.

The assessment plan states that the knowledge test should typically be passed before progressing to the portfolio-based 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-based 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 Highfield as the EPAO.

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# Gateway

## How to prepare for gateway

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

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

- customer feedback
- recordings
- manager statements
- witness statements

As well as evidence from others, such as:

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

In advance of gateway, apprentices will need to have:

- 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 employer 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, e.g. employee ID card or travel card

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# Highfield Level 3 End-Point Assessment for 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	
<b>Knowledge</b>	
Learners need to show they understand their organisational purpose, activities, aims, values, vision for the future, resources, and the way that the political/economic environment affects the organisation.	
<b>Portfolio-based interview</b>	
<b>To pass, the following must be evidenced</b>	<b>To gain a distinction, the following must be evidenced</b>
TO1 Shows a working knowledge of the organisation's <b>purpose</b> , aims and ways of working, putting it in <b>context</b> of the local (or sector) environment	TO3 Shows a <b>thorough understanding</b> of the organisation's purpose, aims and way of working, putting it in context of the <b>wider</b> economy and political environment
TO2 Provides some understanding of the <b>political and economic environment</b>	
<b>Knowledge test</b>	
<b>Indicative assessment criteria</b>	
TO4	Describe the <b>purpose</b> and vision of the organisation
TO5	Explain how the <b>wider political</b> and <b>economic</b> environment can affect the organisation

## Amplification and guidance

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

**Context:** perspective, circumstance, setting

**Thorough understanding:** be able to show a **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
- interest rates
- productivity
- behaviour of consumers and institutions

**Guidance: TO4 Describe the purpose and vision of the organisation**

Content areas to cover:

- 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.

**Guidance: TO5 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.

### Project presentation / Portfolio-based interview

#### To pass, the following must be evidenced

VS1 Understands the **structure** of the organisation and **how their work contributes**

VS2 Identifies their **role** within the team and **value** of their skills

#### To gain a distinction, the following must be evidenced

VS3 Understands the structure of the organisation and is able to discuss how **different** teams support each other

VS4 Understands the contribution their work makes and promotes its **value**

VS5 Identifies their role within the team and is able to **compare their skills 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

**Promote:** publicises, makes it known

**Compared:** 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.

### Project presentation / Portfolio-based interview

#### To pass, the following must be evidenced

- ST1 Understands **how to** manage **stakeholders**, e.g. **clarifying** and **delivering** on expectations
- ST2 Demonstrates they have **worked with** stakeholders to **achieve results**

#### To gain a distinction, the following must be evidenced

- ST3 Understands and follows the principles of **stakeholder management**
- ST4 Goes **beyond expectations** to build constructive relationships with stakeholders

### Knowledge test

#### Indicative assessment criteria

- ST5 Identify methods of **stakeholder** management
- ST6 Describe the differing **stakeholder** relationships to an organisation including:
- internal customers
  - external customers
  - clients and/or suppliers

### Amplification and guidance

#### How to:

- identify
- analyse
- plan

- communicate
- clarify
- negotiate
- influence
- deliver

**Working with:**

- 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

**Stakeholder management:**

- 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: ST5 Identify methods of stakeholder management**

Content areas to cover:

- conflicts of interest, handling complaints
- domestic and international stakeholders
- internal and external stakeholders
- methods of communication
- power and interest of stakeholders
- stakeholder mapping, analysis, engagement

**Guidance: ST6 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

<b>Relevant regulation</b>	
<b>Knowledge</b>	
Understands laws and regulations that apply to their role including data protection, health and safety, compliance etc. Supports the company in applying the regulations.	
<b>Portfolio-based interview</b>	
<b>To pass, the following must be evidenced</b>	<b>To gain a distinction, the following must be evidenced</b>
RR1 Demonstrates knowledge of <b>relevant laws and regulation</b> and <b>consistently</b> follows them	RR2 Shows a <b>thorough</b> knowledge of relevant laws and regulations and <b>consistently</b> follows them  RR3 <b>Champions adherence</b> to relevant laws and regulation within the organisation
<b>Knowledge test</b>	
<b>Indicative assessment criteria</b>	
RR4 Outline <b>relevant laws and regulations</b> that apply to their role including: <ul style="list-style-type: none"> <li>• data protection</li> <li>• health and safety</li> <li>• compliance</li> </ul>	
<b>Amplification and guidance</b>	
<b>Relevant laws and regulations</b> <ul style="list-style-type: none"> <li>• Equality Act 2010</li> <li>• Employment Rights Act 1996</li> <li>• Employment Relations Act 2004</li> <li>• Contracts of Employment</li> <li>• Data Protection Act 1998</li> <li>• Copyright, Designs and Patent Act 1988</li> </ul>	

- 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: RR4 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
- Information Commissioner's Office (ICO)
- intellectual property rights
- minimum wage

- personal data/sensitive personal data
- risk assessments
- whistleblowing

<b>Policies</b>	
<b>Knowledge</b>	
Understands the organisation's <b>internal policies</b> and <b>key business policies</b> relating to sector.	
<b>Portfolio-based interview</b>	
<b>To pass, the following must be evidenced</b>	<b>To gain a distinction, the following must be evidenced</b>
PO1 Understands and <b>follows</b> the organisation's <b>internal policies</b>	PO2 Understands and <b>promotes</b> the organisation's internal policies
<b>Amplification and guidance</b>	
<p><b>Internal policies:</b></p> <ul style="list-style-type: none"> <li>• employee conduct</li> <li>• equality and diversity</li> <li>• attendance and time off</li> <li>• dress code</li> <li>• computer use - internet access, social media use</li> <li>• substance abuse</li> </ul> <p><b>Follow:</b> must be able to demonstrate that they have followed relevant policies/procedures</p> <p><b>Promote:</b> makes known to the team</p> <p><b>Key business policies:</b> specific policies that relate to the organisation's sector</p>	

## Business fundamentals

### Knowledge

Understands the applicability of business principles such as managing change, business finances and project management.

### Knowledge test

#### Indicative assessment criteria

- BF1 Describe the **applicability** of **business principles**
- BF2 Describe the **fundamentals** of **business finance**
- BF3 Describe the **fundamentals** of **managing change**
- BF4 Describe the **fundamentals** of **project management**

### Amplification and guidance

**Applicability:** appropriateness, validity, relationship, relevancy, opportunity cost, quality standards, control, assurance

**Business principles:** e.g. quality assurance, quality control, internal quality standards, opportunity cost

**Fundamentals:** basics, essentials, the key principles

#### Business finance:

- balance sheets
- breakeven
- budgets
- cash flow
- creditors
- debtors
- expenditure
- revenue
- payroll

**Managing change:**

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

**Project management:**

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

**Project management tools:**

- Gantt charts
- Just-in-time (JIT) system
- lifecycle of a project - initiation, planning, execution, monitoring, close

- marketing mix
- PERT chart
- project dashboard
- 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

#### To pass, the following must be evidenced

PR1 Understands and **consistently** follows the organisation's processes

PR2 Makes suggestions for **small** improvements and supports on successful implementation

#### To gain a distinction, the following must be evidenced

PR3 Understands and follows organisational processes and **promotes** their adherence and improvements

PR4 Able to identify **inefficiencies** or **ineffectiveness** in a process and support on successful implementation

### 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

## 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.

### Portfolio-based interview

#### To pass, the following must be evidenced

EE1 Understand the **external factors** affecting the organisation and how they **relate** to their role

#### To gain a distinction, the following must be evidenced

EE2 Shows a deep understanding of the **external factors** facing the organisation and how they **relate** to their role

EE3 Seeks additional information about how those factors are developing

### Knowledge test

#### Indicative assessment criteria

EE4 Describe relevant **external factors**:

- market forces
- policy and regulatory changes
- supply chain

### Amplification and guidance

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

#### External factors:

- 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: EE4 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, tariffs, barriers, embargos, etc.
- how external factors affect costs, revenues, profits, turnover, morale, supply, demand, growth, 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.

### Project presentation / Portfolio-based interview

#### To pass, the following must be evidenced

- IT1 Demonstrates they can use **IT packages**, specifically to write **letters or emails**, and to **record** and **analyse** information
- IT2 Able to perform tasks relevant to their role using **IT packages** without supervision

#### To gain a distinction, the following must be evidenced

- IT3 **Consistently** demonstrates they can use **IT packages** and can provide **varied, quality** examples
- IT4 Able to perform tasks relevant to their role using **IT packages** and can **coach others** in using IT

### 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.

**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 - data that 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

**Quality:** 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-based interview

#### To pass, the following must be evidenced

- RD1 Records are **accurate**, **rarely** require correction and are treated confidentially
- RD2 Recommendations and solutions only need **minor improvements**
- RD3 Supports others in producing documents and can provide examples

#### To gain a distinction, the following must be evidenced

- RD4 Records are **consistently** accurate and confidential
- RD5 Recommendations are **insightful**, clearly recorded and result in a **clear benefit** to the organisation
- RD6 Offers to coach others and good performance is recorded in 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

#### To pass, the following must be evidenced

- DM1 Decisions are thought through, using a **range** of information to make a **sound** judgement
- DM2 Challenges appropriately and is polite when doing so
- DM3 Exercises **sound** judgement when asking for advice by choosing the appropriate time, manner and person

#### To gain a distinction, the following must be evidenced

- DM4 Decisions are **timely and consistently** show good judgement
- DM5 Decisions are **continuously** made by thoughtfully considering **different** information and the risks of any action
- DM6 Decisions are **fully** evidenced and **justifiable**
- DM7 **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 / Portfolio-based interview

#### To pass, the following must be evidenced

IS1 Works effectively with a **range** of people  
 IS2 **Influences** and challenges peers when necessary  
 IS3 Supports others in the organisation and demonstrates coaching skills

#### To gain a distinction, the following must be evidenced

IS4 **Influences** managers as well as peers  
 IS5 Constructively challenges managers, as well as peers, when necessary  
 IS6 **Proactively** offers to coach others and has had good performance recorded in 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.

### Project presentation / Portfolio-based interview

#### To pass, the following must be evidenced

- CO1 Demonstrates they can communicate clearly, in both written and verbal communication
- CO2 Shows flexibility to **different** situations
- CO3 Uses appropriate **communication channels** dependent on the subject matter
- CO4 Demonstrates ability to answer queries effectively from both inside and outside the organisation

#### To gain a distinction, the following must be evidenced

- CO5 Communication is **consistently** clear, both written and verbally
- CO6 Champions an appropriate choice of communication channels
- CO7 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-based interview

#### To pass, the following must be evidenced

- QU1 **Checks** own work before submission and makes improvements
- QU2 Work is **largely** accurate and meets expectations
- QU3 Identifies areas for improvement and can **justify** why
- QU4 Promotes best practice examples of administration, such as accurate records

#### To gain a distinction, the following must be evidenced

- QU5 Takes ownership for work and **applies** processes for checking work
- QU6 Work is **consistently accurate** and meets the agreed outcomes
- QU7 Recommends and implements process improvements
- QU8 **Proactively** offers to **coach** others in an area of work and communicates 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.

**Applies:** 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 the 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.

### Project presentation / Portfolio-based interview

#### To pass, the following must be evidenced

- PL1 **Plans** work and achieves deadlines
- PL2 Shares areas to improve plans with others
- PL3 Effectively manages resources and meetings
- PL4 Takes **responsibility for logistics** and can provide examples

#### To gain a distinction, the following must be evidenced

- PL5 Makes plans that efficiently **maximise** resources and personally ensures results are achieved
- PL6 **Improves** the management of resources e.g. identifies cost savings or process improvements
- PL7 Is **proactive** in taking **responsibility for areas of logistics** and has excellent examples to demonstrate this

### 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

#### To pass, the following must be evidenced

PM1 Effectively plans and manages **small** projects  
 PM2 Able to lead small projects when required  
 PM3 Demonstrates some understanding of project management tools and principles

#### To gain a distinction, the following must be evidenced

PM4 Plans and manages **significant** project and can describe what made it a success  
 PM5 Demonstrates strong leadership skills when managing a project  
 PM6 Understands and is able to apply a strong grasp of project management tools and principles

### Knowledge test

#### Indicative assessment criteria

PM7 Identify **project management tools** and **principles**  
 PM8 Describe strong **leadership skills** when managing a project  
 PM9 Understands and is able to apply a strong grasp of **project management tools** and **principles**

### Amplification and guidance

#### Project management principles:

- leading
- managing
- organising
- planning
- 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
- 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. autocratic, democratic, laissez-faire, participative, strategic, transformational, etc.

**Leadership skills:**

- commitment - follow through with agreements
- communication - clear, succinct, listening, written, verbal
- 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
- 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-based interview

#### To pass, the following must be evidenced

PF1 **Consistently** behaves in a **professional** way, showing **punctuality, respect** for **others** and personal presentation  
 PF2 Follows the **standard** of conduct required by the organisation

#### To gain a distinction, the following must be evidenced

PF3 Is a role model employee, showing **professionalism** in their conduct, **punctuality**, presentation and **respect** for **others**, irrespective of background, even in **difficult circumstances**  
 PF4 Can be **relied upon** to represent the team and 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.

### Project Presentation / Portfolio-based interview

#### To pass, the following must be evidenced

PQ1 **Regularly** shows integrity, reliability, positivity and self-motivation

#### To gain a distinction, the following must be evidenced

PQ2 **Always** shows integrity, reliability, positivity and self-motivation and successfully encourages others to show more of these qualities

### 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.

### Project Presentation / Portfolio interview

#### To pass, the following must be evidenced

- MP1 **Clarifies** requirements and takes responsibility for work produced
- MP2 Acts with responsibility and delivers their work to the **right level of quality** without requiring additional supervision and coaching
- MP3 Asks for feedback and takes feedback on board

#### To gain a distinction, the following must be evidenced

- MP4 Shows a **strong** personal responsibility for all aspects of their work and can work with **minimal** supervision, whilst adhering to policies, procedures and standards
- MP5 Takes feedback on board and continually assesses 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.

### Project Presentation / Portfolio-based interview

**To pass, the following must be evidenced**

AD1 **Accepts** and **responds positively** to change

**To gain a distinction, the following must be evidenced**

AD2 Accepts change, **evaluates** the impact of any change and seeks to **use** it 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.

### Project Presentation / Portfolio interview

#### To pass, the following must be evidenced

- RE1 **Accepts** personal responsibility for their own work, **delivering** their work **on time** and to the **right level of quality**
- RE2 Demonstrates ownership and willingness to see work completed
- RE3 Applies initiative in developing their own skills and behaviour

#### To gain a distinction, the following must be evidenced

- RE4 **Role model** who takes personal responsibility for themselves and peers
- RE5 Aims to deliver work **within targets** and **deliver more than required in their role**
- RE6 **Proactively** seeks opportunities to develop themselves and **shares** 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. 60-minute knowledge test consisting of 50 questions - *this should typically be passed before progressing to the interview or presentation.*
2. Project presentation, which should last 15 minutes with a further 15 minutes for a Q&A session.
3. 45-minute portfolio-based interview.

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

Each component of the end-point assessment will be assessed against the appropriate criteria laid out in this guide, which will be used to determine an overall grade for the apprentice.

## Knowledge test

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- To pass the knowledge test, apprentices must achieve at least 60%, which equates to 30 out of 50
- To achieve a distinction in the knowledge test, apprentices must achieve at least 80%, which equates to 40 out of 50

## Project presentation

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- To pass the project presentation, 100% of the mandatory pass criteria must be achieved
- To achieve a distinction in the project presentation, 100% of the mandatory pass and distinction criteria must be achieved
- In addition, a set of either/or pass and distinction criteria must be achieved across the project presentation and the portfolio-based interview.

## Portfolio-based interview

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- To pass the portfolio-based interview, 100% of the mandatory pass criteria must be achieved

- To achieve a distinction in the portfolio-based interview, 100% of the mandatory pass and distinction criteria must be achieved
- In addition, a set of either/or pass and distinction criteria must be achieved across the project presentation and the portfolio-based interview.

## Grading

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All 3 assessment methods are graded pass/distinction.

The Business Administrator standard includes a number of 'either/or' criteria that may be achieved in the project presentation or the portfolio-based interview, in addition to the mandatory criteria designated to each assessment method. All of the pass criteria must be met across the components in order to pass the apprenticeship overall. All of the distinction criteria must be met across the components in order to achieve a distinction overall.

Apprentices must achieve a pass in all 3 assessment methods to pass the apprenticeship. A distinction grade must be achieved in all 3 assessment methods to achieve an overall distinction for the apprenticeship.

## Retake and resit information

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If an apprentice fails an end-point assessment method, it is the employer, provider and apprentice's decision whether to attempt a resit or retake. If a **resit** is chosen, please call the Highfield scheduling team to arrange the resit. If a **retake** is chosen, the apprentice will require a period of further learning and will need to complete a new gateway readiness meeting and report. Once this is completed, please call the Highfield scheduling team to arrange the retake.

Should an apprentice fail 2 or more activities, a full retake must take place. A period of further training and development lasting between 1 and 3 months must take place before the retake is scheduled and a new assessment window will be agreed following the period of additional learning. The decision on how much time is required is based on a discussion between the apprentice, their employer and end-point assessor. This further training can begin as soon as a learner's result has been released.

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.

The Business Administrator standard has a number of 'either/or' criteria that may be assessed during either the project presentation or the portfolio-based interview. The 'either/or' criteria that have not been met during the project presentation may be carried over to the portfolio-based interview. Where criteria have been carried over and the learner subsequently does not meet them during the interview either, the apprentice will fail the interview. Providing the mandatory project presentation criteria have been achieved, they will pass the project presentation. When resitting or retaking the portfolio-based interview, all of the mandatory criteria for the portfolio-based interview must be re-attempted including any either/or criteria that weren't passed in the project presentation.

Should there be a situation where the assessor feels an apprentice is unlikely to be able to attempt a large number of carried over criteria as well as all criteria assigned to the portfolio-based interview in the time allowed, they will advise in their feedback that the apprentice should resit both the project presentation and the portfolio-based interview. It is then up to the employer, training provider and apprentice which option they take.

During the project presentation, if an apprentice fails to achieve any of the mandatory criteria designated for the project presentation alone, they will fail the project presentation and have to re-sit or retake.

During the portfolio-based interview, if an apprentice fails to achieve any of the mandatory criteria designated for the portfolio-based interview alone, they will fail the portfolio-based interview and have to re-sit or retake.

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

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## Assessing the knowledge test

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The following areas (knowledge) of the business administrator standard will be assessed by a 60-minute knowledge test consisting of 50 questions with the pass mark being 60% (30 out of 50) and the distinction mark being 80% (40 out of 50). The test is available as both an online and paper-based assessment.

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 Highfield mock e-assessment system.

## Knowledge test criteria

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

The organisation	
The apprentice will	Criteria covered in the knowledge test
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.	TO4 Describe the purpose and vision of the organisation
	TO5 Explain how the wider political and economic environment can affect the organisation

Stakeholders	
The apprentice will	Criteria covered in the knowledge test
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.	ST5 Identify methods of stakeholder management
	ST6 Describe the differing stakeholder relationships to an organisation including: <ul style="list-style-type: none"> <li>• internal customers</li> <li>• external customers</li> <li>• clients and/or suppliers</li> </ul>

Relevant regulation	
The apprentice will	Criteria covered in the knowledge test
Understands laws and regulations that apply to their role including data protection, health and safety, compliance etc. Supports the company in applying the regulations.	RR4 Outline <b>relevant laws and regulations</b> that apply to their role including: <ul style="list-style-type: none"> <li>• data protection</li> <li>• health and safety</li> <li>• compliance</li> </ul>

Business fundamentals	
The apprentice will	Criteria covered in the knowledge test
Understands the applicability of business principles such as managing change, business finances and project management.	BF1 Describe the <b>applicability</b> of business principles BF2 Describe the <b>fundamentals</b> of <b>business finance</b> BF3 Describe the <b>fundamentals</b> of <b>managing change</b> BF4 Describe the <b>fundamentals</b> of <b>project management</b>

External environment factors	
The apprentice will	Criteria covered in the knowledge test
Understands relevant external factors, e.g. market forces, policy and regulatory changes, supply chain, etc. and the wider business impact). Where necessary understands the <b>international/global market</b> in which the employing organisation is placed.	EE4 Describe relevant <b>external factors</b> : <ul style="list-style-type: none"> <li>• market forces</li> <li>• policy and regulatory changes</li> <li>• supply chain</li> </ul>

Project management	
The apprentice will	Criteria covered in the knowledge test
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.	PM7 Identify <b>project management tools</b> and <b>principles</b> PM8 Describe strong <b>leadership skills</b> when managing a project PM9 Understands and is able to apply a strong grasp of <b>project management tools</b> and <b>principles</b>

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## Assessing the project presentation

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The apprentice will complete their project from month 9 of the apprenticeship, and this should be completed prior to the end-point assessment being triggered. The project will be submitted via Dropbox with the gateway readiness report.

The apprentice will 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.

**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 criteria 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

### Assessment criteria coverage

The presentation must cover the assessment criteria listed on the following pages.

The pages below identify the criteria which **must** be covered during the project presentation. In addition, there are criteria that may be achieved in **either** the portfolio interview, **or** the project presentation. It is recommended that the apprentice attempts to include at least 50% of the remaining criteria in their project presentation. Any that the assessor identifies as not being covered will be carried over and assessed during the portfolio-based interview.

Therefore, the project and presentation must be carefully planned to ensure coverage of as many criteria as reasonably possible to ensure sufficient time is afforded to the apprentice during each assessment component.

Apprentices must achieve 100% of the mandatory project presentation pass criteria to pass. In addition to this, apprentices must achieve 100% of the mandatory project presentation distinction criteria to achieve a distinction for this component. Where the other criteria have not been covered, these may be carried over to the portfolio-based interview, however it is strongly recommended that at least 50% of the remaining criteria is covered by this component to prevent carry over of a large amount to the interview.

### **Before the assessment:**

Employers/training providers should:

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

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

## Project presentation - mock assessment

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

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

Consider an audio recording of the mock, and to allow the mock to be observed by other apprentices, especially if it is not practicable for the employer/training provider to carry out a separate mock assessment with each apprentice.

Ensure that the apprentice's performance is assessed by a competent trainer/assessor, and that feedback is shared with the apprentice, to complete the learning experience. Mock marking grids are available to download from the Highfield Assessment website.

Examples of the types of question that may be asked during the Q&A include:

- 'If you had noticed an inefficiency in a process, how would you have resolved this?'
- 'If you believed your line manager had made a mistake, how would you communicate this?'
- 'Tell me about how you react to change within your organisation.'
- 'Tell me about your interactions with different stakeholders.'

## Project presentation criteria

The following are mandatory assessment criteria that **must** be covered during the project presentation.

Processes	
To pass, the following must be evidenced	To gain a distinction, the following must be evidenced
PR1 Understands and consistently follows the organisation's processes	PR3 Understands and follows organisational processes and promotes their adherence and improvements
PR2 Makes suggestions for small improvements and supports on successful implementation	PR4 Able to identify inefficiencies or ineffectiveness in a process and support on successful implementation

  

Decision making	
To pass, the following must be evidenced	To gain a distinction, the following must be evidenced
DM1 Decisions are thought through, using a range of information to make a sound judgement	DM4 Decisions are timely and consistently show good judgement
DM2 Challenges appropriately and is polite when doing so	DM5 Decisions are continuously made by thoughtfully considering different information and the risks of any action
DM3 Exercises sound judgement when asking for advice by choosing the appropriate time, manner and person	DM6 Decisions are fully evidenced and justifiable
	DM7 Consistently behaves and seeks advice in a mature way

  

Project management	
To pass, the following must be evidenced	To gain a distinction, the following must be evidenced
PM1 Effectively plans and manages small projects	PM4 Plans and manages significant project and can describe what made it a success
PM2 Able to lead small projects when required	PM5 Demonstrates strong leadership skills when managing a project
PM3 Demonstrates some understanding of project management tools and principles	PM6 Understands and is able to apply a strong grasp of project management tools and principles

## Either/Or criteria

The following assessment criteria may be assessed in either the project presentation OR the portfolio-based interview. If not covered during the project presentation, they may be covered by the portfolio-based interview. It is **strongly** recommended that at least 50% of the criteria below are covered during the project presentation, and so this must be carefully planned to allow the apprentice the best chance.

\*The criteria that lend themselves to the project presentation are indicated with an asterisk, however, this should be treated as guidance and as such is **not** a requirement of the end-point assessment.

Value of their skills	
To pass, the following must be evidenced	To gain a distinction, the following must be evidenced
VS1 Understands the structure of the organisation and how their work contributes	VS3 Understands the structure of the organisation and is able to discuss how different teams support each other
VS2 Identifies their role within the team and value of their skills*	VS4 Understands the contribution their work makes and promotes its value*
	VS5 Identifies their role within the team and is able to compare their skills with others*

Stakeholders	
To pass, the following must be evidenced	To gain a distinction, the following must be evidenced
ST1 Understands how to manage stakeholders, e.g. clarifying and delivering on expectations*	ST3 Understands and follows the principles of stakeholder management*
ST2 Demonstrates they have worked with stakeholders to achieve results*	ST4 Goes beyond expectations to build constructive relationships with stakeholders

IT	
To pass, the following must be evidenced	To gain a distinction, the following must be evidenced
IT1 Demonstrates they can use IT packages, specifically to write letters or emails, and to record and analyse information*	IT3 Consistently demonstrates they can use IT packages and can provide varied, quality examples
IT2 Able to perform tasks relevant to their role using IT packages without supervision	IT4 Able to perform tasks relevant to their role using IT packages and can coach others in using IT

Interpersonal skills	
To pass, the following must be evidenced	To gain a distinction, the following must be evidenced
IS1 Works effectively with a range of people*	IS4 Influences managers as well as peers*
IS2 Influences and challenges peers when necessary*	IS5 Constructively challenges managers, as well as peers, when necessary*
IS3 Supports others in the organisation and demonstrates coaching skills	IS6 Proactively offers to coach others and has had good performance recorded in feedback

Communications	
To pass, the following must be evidenced	To gain a distinction, the following must be evidenced
CO1 Demonstrates they can communicate clearly, in both written and verbal communication*	CO5 Communication is consistently clear, both written and verbally*
CO2 Shows flexibility to different situations	CO6 Champions an appropriate choice of communication channels
CO3 Uses appropriate communication channels dependent on the subject matter	CO7 Consistently answers queries from both inside and outside of the organisation in a confident way
CO4 Demonstrates ability to answer queries effectively from both inside and outside the organisation	

### Planning and organisation

To pass, the following must be evidenced	To gain a distinction, the following must be evidenced
<p>PL1 Plans work and achieves deadlines*</p> <p>PL2 Shares areas to improve plans with others*</p> <p>PL3 Effectively manages resources and meetings*</p> <p>PL4 Takes responsibility for logistics and can provide examples</p>	<p>PL5 Makes plans that efficiently maximise resources and personally ensures results are achieved*</p> <p>PL6 Improves the management of resources e.g. identifies cost savings or process improvements*</p> <p>PL7 Is proactive in taking responsibility for areas of logistics and has excellent examples to demonstrate this</p>

### Personal qualities

To pass, the following must be evidenced	To gain a distinction, the following must be evidenced
<p>PQ1 Regularly shows integrity, reliability, positivity and self-motivation</p>	<p>PQ2 Always shows integrity, reliability, positivity and self-motivation and successfully encourages others to show more of these qualities</p>

### Managing performance

To pass, the following must be evidenced	To gain a distinction, the following must be evidenced
<p>MP1 Clarifies requirements and takes responsibility for work produced*</p> <p>MP2 Acts with responsibility and delivers their work to the right level of quality without requiring additional supervision and coaching*</p> <p>MP3 Asks for feedback and takes feedback on board*</p>	<p>MP4 Shows a strong personal responsibility for all aspects of their work and can work with minimal supervision, whilst adhering to policies, procedures and standards*</p> <p>MP5 Takes feedback on board and continually assesses the quality of their work</p>

<b>Adaptability</b>	
To pass, the following must be evidenced	To gain a distinction, the following must be evidenced
AD1 Accepts and responds positively to change	AD2 Accepts change, evaluates the impact of any change and seeks to use it to improve their work

<b>Responsibility</b>	
To pass, the following must be evidenced	To gain a distinction, the following must be evidenced
RE1 Accepts personal responsibility for their own work, delivering their work on time and to the right level of quality*	RE4 Role model who takes personal responsibility for themselves and peers
RE2 Demonstrates ownership and willingness to see work completed*	RE5 Aims to deliver work within targets and deliver more than required in their role*
RE3 Applies initiative in developing their own skills and behaviour	RE6 Proactively seeks opportunities to develop themselves and shares this learning with others

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## Assessing the portfolio-based interview

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The interview will last 45 minutes. The portfolio of learning provides a structure for this conversation and should provide at least 1 piece of evidence for each of the knowledge, skills and behaviours 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 interview assesses the understanding and learning that is shown in the portfolio; the portfolio is not directly assessed.

The pages below identify the criteria which must be covered during the portfolio-based interview. Some criteria are open for assessment by the portfolio-based interview and the project presentation. Where possible, these criteria should be completed within the project presentation, however, they may be carried over to the portfolio interview if not covered.

Apprentices will be marked against the criteria included in the tables on the following pages. Apprentices must achieve 100% of the portfolio-based interview pass criteria **and** all either/or criteria not achieved within the project presentation to pass the assessment. In addition to this, apprentices must achieve 100% of the portfolio-based interview distinction criteria **and** all either/or distinction criteria not achieved within the project presentation to achieve a distinction for this component.

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.

### **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 the discussion at interview, where criteria 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

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.

## The portfolio-based interview - mock assessment

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It is the employer/training provider's responsibility to prepare apprentices for their end-point assessment, and Highfield recommends that the apprentice experiences a mock portfolio-based 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:

- a 45-minute time slot should be available for the complete the portfolio-based interview. If it is intended to be a complete mock assessment covering all relevant standards, however, this time may be split up to allow for progressive learning.
- 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.

Mock marking grids are available to download from the Highfield Assessment website.

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-based interview criteria

The following are mandatory assessment criteria that **must** be covered during the portfolio-based interview. In addition, the ‘either/or’ criteria indicated may be covered if not previously met during the project presentation.

The organisation	
To pass, the following must be evidenced	To gain a distinction, the following must be evidenced
TO1 Shows a working knowledge of the organisation’s purpose, aims and ways of working, putting it in context of the local (or sector) environment	TO3 Shows a thorough understanding of the organisation’s purpose, aims and way of working, putting it in context of the wider economy and political environment
TO2 Provides some understanding of the political and economic environment	

Relevant regulation	
To pass, the following must be evidenced	To gain a distinction, the following must be evidenced
RR1 Demonstrates knowledge of relevant laws and regulation and consistently follows them	RR2 Shows a thorough knowledge of relevant laws and regulations and consistently follows them
	RR3 Champions adherence to relevant laws and regulation within the organisation

Policies	
To pass, the following must be evidenced	To gain a distinction, the following must be evidenced
PO1 Understands and follows the organisation’s internal policies	PO2 Understands and promotes the organisation’s internal policies

External environment factors	
To pass, the following must be evidenced	To gain a distinction, the following must be evidenced
EE1 Understand the external factors affecting the organisation and how they relate to their role	EE2 Shows a deep understanding of the external factors facing the organisation and how they relate to their role  EE3 Seeks additional information about how those factors are developing

Record and document production	
To pass, the following must be evidenced	To gain a distinction, the following must be evidenced
RD1 Records are accurate, rarely require correction and are treated confidentially  RD2 Recommendations and solutions only need minor improvements  RD3 Supports others in producing documents and can provide examples	RD4 Records are consistently accurate and confidential  RD5 Recommendations are insightful, clearly recorded and result in a clear benefit to the organisation  RD6 Offers to coach others and good performance is recorded in feedback

Quality	
To pass, the following must be evidenced	To gain a distinction, the following must be evidenced
QU1 Checks own work before submission and makes improvements  QU2 Work is largely accurate and meets expectations  QU3 Identifies areas for improvement and can justify why  QU4 Promotes best practice examples of administration, such as accurate records	QU5 Takes ownership for work and applies processes for checking work  QU6 Work is consistently accurate and meets the agreed outcomes  QU7 Recommends and implements process improvements  QU8 Proactively offers to coach others in an area of work and communicates requirements for work

Professionalism	
To pass, the following must be evidenced	To gain a distinction, the following must be evidenced
PF1 Consistently behaves in a professional way, showing punctuality, respect for others and personal presentation PF2 Follows the standard of conduct required by the organisation	PF3 Is a role model employee, showing professionalism in their conduct, punctuality, presentation and respect for others, irrespective of background, even in difficult circumstances PF4 Can be relied upon to represent the team and be an ambassador for the organisation

### Either/Or criteria

The following assessment criteria may be assessed in either the project presentation OR the portfolio-based interview. **If not covered during the project presentation**, they may be covered by the portfolio-based interview.

Value of their skills	
To pass, the following must be evidenced	To gain a distinction, the following must be evidenced
VS1 Understands the structure of the organisation and how their work contributes VS2 Identifies their role within the team and value of their skills	VS3 Understands the structure of the organisation and is able to discuss how different teams support each other VS4 Understands the contribution their work makes and promotes its value VS5 Identifies their role within the team and is able to compare their skills with others

Stakeholders	
To pass, the following must be evidenced	To gain a distinction, the following must be evidenced
ST1 Understands how to manage stakeholders, e.g. clarifying and delivering on expectations	ST3 Understands and follows the principles of stakeholder management
ST2 Demonstrates they have worked with stakeholders to achieve results	ST4 Goes beyond expectations to build constructive relationships with stakeholders

IT	
To pass, the following must be evidenced	To gain a distinction, the following must be evidenced
IT1 Demonstrates they can use IT packages, specifically to write letters or emails, and to record and analyse information	IT3 Consistently demonstrates they can use IT packages and can provide varied, quality examples
IT2 Able to perform tasks relevant to their role using IT packages without supervision	IT4 Able to perform tasks relevant to their role using IT packages and can coach others in using IT

Interpersonal skills	
To pass, the following must be evidenced	To gain a distinction, the following must be evidenced
IS1 Works effectively with a range of people	IS4 Influences managers as well as peers
IS2 Influences and challenges peers when necessary	IS5 Constructively challenges managers, as well as peers, when necessary
IS3 Supports others in the organisation and demonstrates coaching skills	IS6 Proactively offers to coach others and has had good performance recorded in feedback

<b>Communications</b>	
<b>To pass, the following must be evidenced</b>	<b>To gain a distinction, the following must be evidenced</b>
<p>CO1 Demonstrates they can communicate clearly, in both written and verbal communication</p> <p>CO2 Shows flexibility to different situations</p> <p>CO3 Uses appropriate communication channels dependent on the subject matter</p> <p>CO4 Demonstrates ability to answer queries effectively from both inside and outside the organisation</p>	<p>CO5 Communication is consistently clear, both written and verbally</p> <p>CO6 Champions an appropriate choice of communication channels</p> <p>CO7 Consistently answers queries from both inside and outside of the organisation in a confident way</p>

<b>Planning and organisation</b>	
<b>To pass, the following must be evidenced</b>	<b>To gain a distinction, the following must be evidenced</b>
<p>PL1 Plans work and achieves deadlines</p> <p>PL2 Shares areas to improve plans with others</p> <p>PL3 Effectively manages resources and meetings</p> <p>PL4 Takes responsibility for logistics and can provide examples</p>	<p>PL5 Makes plans that efficiently maximise resources and personally ensures results are achieved</p> <p>PL6 Improves the management of resources e.g. identifies cost savings or process improvements</p> <p>PL7 Is proactive in taking responsibility for areas of logistics and has excellent examples to demonstrate this</p>

<b>Personal qualities</b>	
<b>To pass, the following must be evidenced</b>	<b>To gain a distinction, the following must be evidenced</b>
<p>PQ1 Regularly shows integrity, reliability, positivity and self-motivation</p>	<p>PQ2 Always integrity, reliability, positivity and self-motivation and successfully encourages others to show more of these qualities</p>

<b>Managing performance</b>	
<b>To pass, the following must be evidenced</b>	<b>To gain a distinction, the following must be evidenced</b>
MP1 Clarifies requirements and takes responsibility for work produced	MP4 Shows a strong personal responsibility for all aspects of their work and can work with minimal supervision, whilst adhering to policies, procedures and standards
MP2 Acts with responsibility and delivers their work to the right level of quality without requiring additional supervision and coaching	MP5 Takes feedback on board and continually assesses the quality of their work
MP3 Asks for feedback and takes feedback on board	

<b>Adaptability</b>	
<b>To pass, the following must be evidenced</b>	<b>To gain a distinction, the following must be evidenced</b>
AD1 Accepts and responds positively to change	AD2 Accepts change, evaluates the impact of any change and seeks to use it to improve their work

<b>Responsibility</b>	
<b>To pass, the following must be evidenced</b>	<b>To gain a distinction, the following must be evidenced</b>
RE1 Accepts personal responsibility for their own work, delivering their work on time and to the right level of quality	RE4 Role model who takes personal responsibility for themselves and peers
RE2 Demonstrates ownership and willingness to see work completed	RE5 Aims to deliver work within targets and deliver more than required in their role
RE3 Applies initiative in developing their own skills and behaviour	RE6 Proactively seeks opportunities to develop themselves and shares this learning with others

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