



Davidson Training UK Ltd
Training for Growing Businesses

BUSINESS ADMINISTRATOR APPRENTICESHIP STANDARD LEVEL 3

HANDBOOK Version 7 July 2024

HANDBOOK

This Handbook has been produced for learners and Employers completing the Business Administrator Apprenticeship Standard Level 3

Davidson Training UK Limited

Business Administrator Apprenticeship Standard Level 3

Qualification aim

Business administrators have a highly transferable set of knowledge, skills and behaviours 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 support of functional areas, working across teams and resolving issues as requested. The flexibility and responsiveness required allows the apprentice to develop a wide range of skills.

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

This apprentice handbook describes your **'LEARNER JOURNEY'** through the programme and provides everything you need to know about the programme and any associated qualifications. Please make sure that you keep a copy of this handy for reference throughout the course.

Benefits/Results for Apprentices

- Continuous development of personal effectiveness and impact as a Business Administrator
- Increased knowledge and confidence to influence behaviours
- Consideration of Employment Rights and Responsibilities
- Gain the key skills to aid career progression
- Receive support from a dedicated team of qualified Trainers/training consultants.
- Targeted learning and development is delivered in alignment with the latest apprenticeship standards – ensuring all learning is relevant, with no gaps in knowledge.
- It will maximise confidence and readiness for End Point Assessment.
- Apprentices gain a range of skills
- Put new skills into practice in own role
- Develop skills using own knowledge, values and motivation

Impact for employers

- Targeted learning and development in complete alignment with the latest apprenticeship standards – ensuring that all learning is relevant, with no gaps in knowledge.
- Maximises Apprentice's confidence and readiness for End Point Assessment.
- Business Administrator with relevant Skills, Knowledge and Behaviours to positively promote the organisation
- Training tailored to organisational goals and values
- Collaboration between in-house training teams and experienced Davidson Training UK Ltd staff
- Flexible delivery options

What opportunities for progression are there?

The administration role may be a gateway to further career opportunities, such as management or senior support roles.

Entry requirements

There are no entry requirements for this qualification however you must be in a position to meet the assessment demands of the qualification, which are work-based and reflective in nature. As this qualification is work-based, Apprentices must be employed in an appropriate role.

Apprentices will be required to have or achieve level 2 English and Maths tests prior to completion of their Apprenticeship.

Age restrictions

This qualification is not approved for under 16s.

Duration

The apprenticeship will take a minimum of 12 months to complete

Completing your Qualification

Davidson Training have an e portfolio called 'MAYTAS HUB'.

Each learner shall be enrolled onto the eportfolio and receive a login to complete enrolment onboarding.

Once they have completed their enrolment and initial assessment, they will be able to access the course modules of their qualification.

The eportfolio is designed in such a way that it follows a Scheme of Work that should be followed at all times with guidance from the Trainer.

You will be sent instructions when your login is created.

The Trainer will also give guidance.

Overview of Business Administrator Apprenticeship Standard Level 3

SKILLS	
IT	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.
Record and document production	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.
Decision making	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.
Interpersonal 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.
Communications	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.
Quality	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.
Planning and organisation	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 management	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.

KNOWLEDGE	
The organisation	Understands organisational purpose, activities, aims, values, vision for the future, resources and the way that the political/economic environment affects the organisation.
Value of their skills	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.
Stakeholders	Has a practical knowledge of managing stakeholders and their differing relationships to an organisation. This includes internal and external customers, clients and/or suppliers. Liaises with internal/external customers, suppliers or stakeholders from inside or outside the UK. Engages and fosters relationships with suppliers and partner organisations.
Relevant regulation	Understands laws and regulations that apply to their role including data protection, health & safety, compliance etc. Supports the company in applying the regulations.
Policies	Understands the organisation's internal policies and key business policies relating to sector.
Business fundamentals	Understands the applicability of business principles such as managing change, business finances and project management.
Processes	Understands the organisation's processes, e.g. making payments or processing customer data. Is able to review processes autonomously and make suggestions for improvements. Applying a solutions-based approach to improve business processes and helping define procedures. Understands how to administer billing, process invoices and purchase orders.
External environment factors	Understands relevant external factors e.g. market forces, policy & regulatory changes, supply chain etc. And the wider business impact). Where necessary understands the international/global market in which the employing organisation is placed.

BEHAVIOURS	
Professionalism	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.
Personal qualities	Shows exemplary qualities that are valued including integrity, reliability, self-motivation, being pro-active and a positive attitude. Motivates others where responsibility is shared.
Managing performance	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.
Adaptability	Is able to accept and deal with changing priorities related to both their own work and to the organisation.
Responsibility	Demonstrates taking responsibility for team performance and quality of projects delivered. Takes a clear interest in seeing that projects are successfully completed and customer requests handled appropriately. Takes initiative to develop own and others' skills and behaviours.

Evidence requirements

Units may be assessed through a number of different sources and forms, which must meet the requirements of assessment criteria, which may include:

- **Natural observation of workplace activities:** Trainers must provide information about the context of the assessment.
- **Products:** Such as reports, letters, e-mails, memos, printouts, etc, are also valuable items of performance evidence.
- **Witness testimony:** Can provide valuable evidence of learner competence. In line with established principles, witness testimony must be:
 - a clear, authentic statement indicating how the learner carries out their job
 - Dated, signed and include the job title of the witness.
- **Learner reports** (feedback): Oral or written reports from the learner which involve descriptions of activities and processes and some self-assessment, e.g., a work diary.
- **Reflective accounts:** A reflective account is usually a write up of how a learner has carried out part of their job, recording events that actually happened. Where possible, the account should state why the learner took the actions they did.
- **Professional discussion:** Professional discussion is a single, or series of, structured, planned and in-depth discussion(s) which can be recorded electronically or manually in paper, computer, audio or video files. Professional discussions can be used to support observation reports, examination of work products and knowledge questionnaires.
- **Verbal / written questions:** Also includes questionnaires; work-based tasks; reflective accounts; case studies; professional discussion; and, feedback reports. Questions should only be asked to fill gaps where knowledge is not explicit.
- **Projects:** An extended piece of practical and/or written work involving planning and research, generally presented as a report.
- **Assignments:** May be practical or written tasks given to learners which test s knowledge, skills, understanding and behaviour.
- **Case studies:** An effective case study report should:
 - clearly identify the core problem(s)
 - analyse the issues underlying the problem
 - discuss and justify alternative solutions using theory / experience
 - present feasible recommendations
 - be presented in an appropriate format
- **Audio/video recordings:** May be used to support observation reports, examination of work products and knowledge questionnaires.
- **Simulation/role play:** A task-based function where there are clear goals which need to be achieved and the outcomes are evaluated in a 'real-work environment'.

Examples of what you will learn:

KNOWLEDGE

Value of their skills

An understanding of how the organisation's structure may differ from others and showing the different types of business, and in which market they sit. Be able to demonstrate understanding of how your own development will not only support your progress within the organisation, but also how you can recognise your skills within the team they work.

Stakeholders

An understanding of how to communicate with customers, both internal and external and how different stakeholders will need to be treated differently dependent on the circumstances involved. You will then be able to show your understanding of how to communicate with customers, both internal and external and how different stakeholders will need to be treated differently dependent on the circumstances involved.

Relevant regulation

An understanding of health and safety within the workplace, but also regulations relating to the use of equipment within your own organisation.

Policies

An understanding of all policies and how these are delivered within the organisation.

Business Fundamentals

Here you will need to research into areas within the business fundamentals if you do not have 'hands on' experience in these areas. You will be asked to complete a project on-programme, here you can begin the process of researching the management of a project which will support you later when demonstrating the skills of project management.

Processes

You may need to research into the various areas if you do not have a 'hands on' opportunity within the various departments. This will be a substantial piece of research. This will include information systems in a business environment, business innovation and growth along with understanding financial management.

SKILLS

IT

You will produce various pieces of product evidence to demonstrate your skills whilst using IT. Some of this evidence could come from screen dumps which have been annotated.

Opportunities to analyse data will also be considered to enable you to present and analyse such data.

Software likely to be utilised may include; word processing, spreadsheet and either database or bespoke management of information software as available within the organisation. Storage of such information could be electronic or paper-based.

Record and document production

Understand and prepare business documentation. Information storage and retrieval and communicate in writing. You will demonstrate not only your own skills, but be able to coach others by mentoring a new member of staff or another learner perhaps at a lower level qualification. Records and files could be both electronic and paper based.

Decision making

You will demonstrate your knowledge and apply that to the decision making process, in particular showing where you have sought advice from more senior members of the organisation. This will cover also understanding all aspects of decision making across the organisation.

Interpersonal skills

Building and maintaining relationships. Influence and challenge. Become a role model to peers and team. Develop coaching skills.

You will research into different behaviours and how these have an effect on a team and their performance.

Communication skills

Demonstrate good communication skills, whether face-to-face, on the telephone, in writing or on digital platforms. Negotiation skills.

Demonstrate your knowledge and apply that to the decision making process, in particular showing where you have sought advice from more senior members of the organisation.

Quality

Completing tasks to a high standard and applying yourself. Review processes and suggest improvements. Share good practice across the organisation. Develop and apply problem solving skills.

You will gather evidence here from the start of your apprenticeship and throughout. If you are part of a small team you may need to request the possibility of mentoring a member of staff for a short period of time to demonstrate your skills and knowledge in the development of an individual.

You may want to consider starting your project/presentation for EPA here.

Planning and organisation

Take responsibility initiating and completing tasks. Time management and managing priorities.

Manage the expectation of others and set positive examples. Suggest improvements for working practices, demonstrating an understanding of implications beyond the immediate environment (clients, internal and external customers). Managing resources. Organising meetings and events and taking minutes. Logistics.

You will demonstrate the use of 'to do' lists to show how you manage your time and that of others by prioritising tasks for yourself, meeting deadlines and if in a small to medium organisation researching or creating opportunities to evidence areas not covered in your own organisation. You will demonstrate steps to take when confirming travel and/or accommodation arrangements. If organising meetings/events is not part of your job role, consideration will be given to ensure you have the opportunity to demonstrate these skills

Project management

Project management principles and tools. Planning and the use of required resources to successfully deliver projects. Leading projects.

You can use the Project required on-programme to demonstrate project management if you do not have access in your organisation to facilitate a project in-house.

BEHAVIOURS

Professionalism

You will demonstrate throughout your apprenticeship the organisation's expectations regarding personal presentation but also must present a professional image in line with the organisation's code of conduct. You should also be approachable, welcoming and demonstrates a positive and calm attitude in various situations.

You will demonstrate not only your knowledge of equality and diversity in the workplace but how you ensure you are compliant. You will also consider their Country's Values democracy, the rule of law, individual liberty, mutual respect etc.

Personal Qualities

You will learn to show exemplary qualities that are valued including integrity, reliability, self-motivation, being pro-active and a positive attitude. You will motivate others where responsibility is shared.

You will conduct your own self-assessment to identify strengths and weaknesses in relation to your job role.

Managing Performance

Take responsibility for own work, accepting feedback in a positive manner, uses initiative and shows resilience. Take responsibility for own development. Self-assess your own work and complies with organisations procedures.

You will review the effectiveness of your own personal development plan. You will be able to use your appraisal process to accept any feedback in a positive manner as well as during everyday tasks. You will complete a CPD (Continual Professional Development) plan throughout your apprenticeship.

Adaptability

You will be able to accept and deal with changing priorities related to both your own work and to the organisation. Have the ability to recognise when change is needed, whether within your own job role or for the organisation and support others to deal with that change.

Responsibility

Taking responsibility for team performance and quality of projects delivered. Take a clear interest in seeing that projects are successfully completed and customer requests handled appropriately. Takes initiative to develop own and others' skills and behaviours. You will learn how to take responsibility across all areas of your job role as well as taking the initiative in your own and others' skills, behaviours and development.

English and Maths Functional Skills

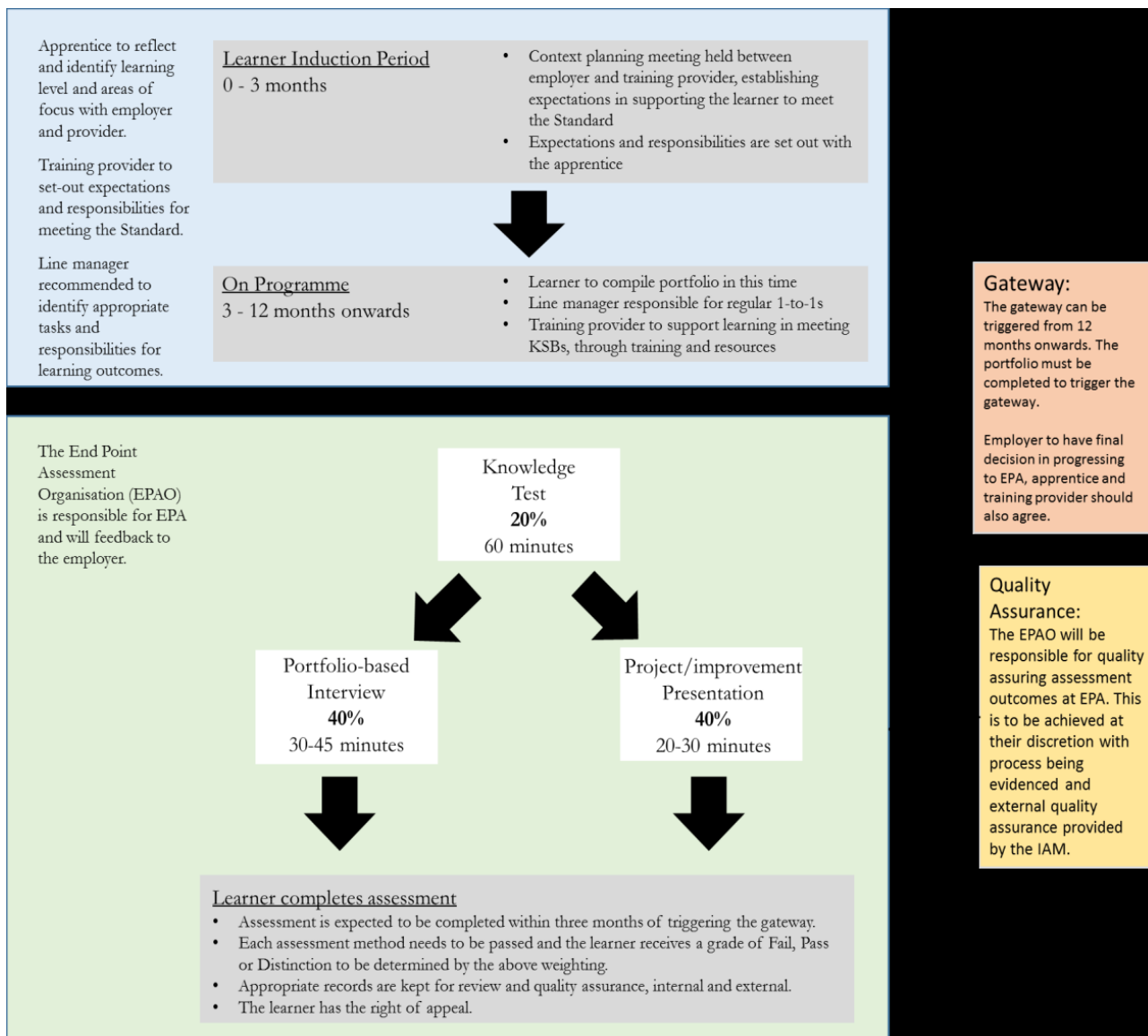
Apprentices will be required to have or achieve level 1 English and Maths and to have taken level 2 English and Maths tests prior to completion of their Apprenticeship unless they already hold the required qualifications or equivalents.

On Programme learning

The period of learning, development and continuous assessment is managed by the employer, in most cases with the support of the training provider. The on-programme pace will be driven by individuals as well as by the breadth of experience an employer can offer prior to the minimum of 12 months after which end-point assessment will take place.

Employers will work closely with the training provider to plan and deliver support and training appropriately. This working closely will add value to the employer as it centres on real work competencies demonstrated in a real work environmen

The Assessment Methodology and End Point Assessment (EPA)



End-point assessment (EPA) – What is this?

End-point assessment is a new way of assuring quality in the apprenticeship system. It replaces the existing model of continuous assessment resulting in qualifications.

The decision on readiness to progress to the End Point Assessment will be taken by the line manager and apprentice with input from the Training Provider.

The End Point Assessment (EPA) consists of three elements, all of which may be completed online. All assessment methods need to be passed. Each assessment method should directly assess the knowledge, skills and behaviours of the Standard. The Trainer has the final decision.

Business Administrator Apprenticeship Standard End Point Assessment consists of:

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**

Knowledge test

- 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

- 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

- 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

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 the pass criteria must be met across the components 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.

Knowledge Test:

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

Please view the Annex A table which details the criteria required for a Pass or Distinction.

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.	<p>TO4 Describe the purpose and vision of the organisation</p> <p>TO5 Explain how the wider political and economic</p>

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.	<p>ST5 Identify methods of stakeholder management</p> <p>ST6 Describe the differing stakeholder relationships to an organisation including:</p> <ul style="list-style-type: none"> • internal customers • external customers • clients and/or suppliers

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.	<p>RR4 Outline relevant laws and regulations that apply to their role including:</p> <ul style="list-style-type: none"> • data protection • health and safety • compliance

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.	<p>BF1 Describe the applicability of business principles</p> <p>BF2 Describe the fundamentals of business finance</p> <p>BF3 Describe the fundamentals of managing change</p> <p>BF4 Describe the fundamentals of project management</p>

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 international/global market in which the employing organisation is placed.	<p>EE4 Describe relevant external factors:</p> <ul style="list-style-type: none"> • market forces • policy and regulatory changes • supply chain

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.	<p>PM7 Identify project management tools and principles</p> <p>PM8 Describe strong leadership skills when managing a project</p> <p>PM9 Understands and is able to apply a strong grasp of project management tools and principles</p>

Assessing the project presentation

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 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, a question will be generated by the Trainer. 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 Trainer 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.

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.'

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
<p>PR1 Understands and consistently follows the organisation's processes</p> <p>PR2 Makes suggestions for small improvements and supports on successful implementation</p>	<p>PR3 Understands and follows organisational processes and promotes their adherence and improvements</p> <p>PR4 Able to identify inefficiencies or ineffectiveness in a process and support on successful implementation</p>

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

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

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 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 *** ST2 Demonstrates they have worked with stakeholders to achieve results ***	ST3 Understands and follows the principles of stakeholder management *** 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 *** IT2 Able to perform tasks relevant to their role using IT packages without supervision	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

INTERPERSONAL SKILLS

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

COMMUNICATIONS

To pass, the following must be evidenced	To gain a distinction, the following must be evidenced
<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>

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
PQ1 Regularly shows integrity, reliability, positivity, and self-motivation	PQ2 Always shows integrity, reliability, positivity, and self-motivation and successfully encourages others to show more of these qualities

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>

ADAPTABILITY

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
Amplification and guidance	
<p>Accept: acknowledge, agree to Respond positively: react, act Evaluate: assess, judge, measure, review Use: applied, utilised</p>	

RESPONSIBILITY

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

Assessing the portfolio-based interview

Portfolio-based Interview:

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 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 of Learning contains evidence of:

- a minimum of 8-12 pages is expected for consistency
- 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.

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
<p>RD1 Records are accurate, rarely require correction and are treated confidentially</p> <p>RD2 Recommendations and solutions only need minor improvements</p> <p>RD3 Supports others in producing documents and can provide examples</p>	<p>RD4 Records are consistently accurate and confidential</p> <p>RD5 Recommendations are insightful, clearly recorded and result in a clear benefit to the organisation</p> <p>RD6 Offers to coach others and good performance is recorded in feedback</p>

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

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

VALUE OF THEIR SKILLS

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

STAKEHOLDERS

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

IT

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

INTERPERSONAL SKILLS

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

COMMUNICATIONS

To pass, the following must be evidenced	To gain a distinction, the following must be evidenced
<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>

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>

ADAPTABILITY

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

RESPONSIBILITY

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

End Point Assessment – Summary of roles and responsibilities.

Employer	<p>Brings a view of the apprentice working with them in the workplace through the apprenticeship</p> <p>Works with the training provider to carry out a continuous review of the evidence generated by the apprentice as part of the on-programme assessment process</p> <p>Supports 'on the job' training and offers relevant experience</p> <p>Decides on the timing of final assessment with the support of the Training Provider</p>
Training Provider (This function could be undertaken by the Employer)	<p>Brings a view of the apprentice from supporting them through the apprenticeship</p> <p>Works collaboratively with the employer on the behaviours of the apprentice</p> <p>Delivers 'off the job' training</p> <p>Works with the employer and undertakes assessment of the apprentice against the standards as part of the on-programme assessment process</p> <p>Supports the employer on deciding the timing of final assessment</p>
Independent Trainer	<p>Provides an independent view as they will not have had any prior involvement with the apprentice</p> <p>Brings added rigor and consistency to the assessment through their wider industry perspective, knowledge and experience</p> <p>Assesses all components of the final end assessment independently using externally set marking/grading criteria</p> <ul style="list-style-type: none"> • Participates in regular standardisation events

Grading scale:

Fail – apprentice has not met the pass criteria

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

Pass – apprentice has met the pass criteria in all assessment methods

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

Distinction – apprentice has met the pass and distinction criteria in all assessment methods

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