

# **End-Point Assessment Services School Business Professional L4**

Guidance for employers and  
training providers

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Web version

(without appendices)

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## Introduction

**Title:** School Business Professional Apprentice  
**Standard:** ST0575/AP01  
**Level:** 4

Welcome to the Best Practice Network (BPN) end-point assessment guidance document for the School Business Professional Level 4 Apprenticeship Standard, the purpose of which is to support employers to make an informed choice regarding the selection of BPN as their preferred End-Point Assessment Organisation (EPAO) and to set out how we deliver end-point assessments.

BPN is a learning partner with the Institute for School Business Leadership (ISBL) and has more than four years' experience delivering the Diploma for School Business Leaders qualification at levels 4 and 5. We were one of the first organisations accepted onto the register for end-point assessments for this particular standard.

## How the apprentice will be assessed

Apprentices will be assessed according to the requirements of the **SBP L4 Assessment Plan**

BPN will test the apprentice against the entire standard through 2 assessment methods:

- **Simulated task**
- **Project report & presentation with questions and answers (Q&A).**

The knowledge, skills and behaviours (KSBs) to be tested by each assessment method are set out in Appendix A. These replicate Annex 1 in the Assessment Plan.

BPN independent assessors will assess and grade each assessment activity separately and combine the results using a best-fit model to determine the EPA and apprenticeship grade. Each assessment method will be graded fail, pass or distinction using the grading criteria in appendix B. The distinction criteria build on the pass criteria.

To achieve a pass, apprentices must achieve at least a pass in both assessment methods. A pass represents full competence against the apprenticeship standard.

To achieve a distinction, apprentices must achieve a distinction in both assessment methods – see grading combinations in appendix B of this document that replicates the Assessment Plan

There are no caps to grading.

Independent assessors' decisions will be subject to moderation and results will not be confirmed with the apprentice until after moderation.

## The simulated task

BPN will provide each apprentice undertaking an end-point assessment with two examples of a brief detailing the task requirements. These will be made available through ACE360 after registration with us and before Gateway assessment, to support their preparation for end-point assessment. Each apprentice will also be provided with a guidance on what to expect and how to prepare.

The purpose of this assessment method is to simulate a situation in which a school business professional may be required to gather and present information within a tight schedule to school governors.

The conduct of the simulated task assessment will be in line with the requirements of the assessment plan, specifically:

- 1.5 hours to prepare a short-written report which will be presented verbally, 10 minutes for verbal presentation and 10 – 12 minutes for questions; all completed on the same day.
- Apprentices will be given one and a half hours to complete this written task in the form of a report to the governors. BPN will prepare a bank of tasks, each based on the specified areas of the standard. These tasks will mirror the type of reports that apprentices in the school business professional role will be expected to produce for governors. BPN have developed 'task banks' of sufficient size to prevent predictability and will review these, and the tasks they contain, regularly to ensure they are fit for purpose. Tasks will be allocated to apprentices at random.
- Apprentices should produce the report to governors electronically and may refer to online reference materials. The report must be completed under examination conditions with an independent invigilator present. This might be the independent assessor in a dual role of invigilator/assessor. Independent assessors will have 15 minutes to review the report, before the apprentice presents the report orally to the independent assessor, as if the independent assessor were a governor in an educational setting. The presentation must last 10 minutes (+/- 1 minute). The independent assessor will ask clarification questions regarding the report/presentation within a further 10-12 minute time period. The evidence from the report, presentation and questioning will be assessed holistically, using the grading criteria in Appendix B
- The apprentice will be given a brief detailing the task requirements.
- Apprentices can use a laptop, PC or tablet to complete the assessment which must be submitted electronically or in hard copy. The apprentice, employer or training provider must provide or arrange all the resources used in the assessment.
- The question session and grading of the assessment will take place according to the assessment plan requirements.

## The work-based project, presentation, questions & answers

The assessment plan requires that apprentices complete a project report based on their workplace project. The project should be suitably anonymised ensuring that all sensitive school-based information is removed/redacted and fully complies with the apprentice's school data protection policies.

- The plan specifies that the project report should be submitted to the EPAO two weeks into the EPA period. Further guidance on the workplace project and workplace project report is available in Appendix C1
- Following the submission of the project report, a date will be confirmed for the EPA test day(s) during which the apprentice will complete the two EPA assessment methods.

BPN will agree workplace project proposals before projects are initiated. Proposals (Appendix C2) must be submitted through ACE360 using the document naming procedure of EPA\_SBPL4\_Project\_Proposal\_Form\_Apprenticename\_Trainingprovider

The conduct of the project report assessment will be in line with the requirements of the assessment plan, specifically:

- Apprentices must prepare a report and presentation during the EPA period on their workplace project that links to at least two knowledge areas of the standard; Finance, Procurement, Human Resources, Managing Support Services, Marketing and Infrastructure.
- The workplace project report must be submitted to BPN no later than 10 working days after BPN has confirmed the apprentice is 'EPA Ready.'
- The workplace project report must be accompanied by a submission form (Appendix C4), provided by BPN confirming the authenticity of the report and supporting materials. This is a requirement of submission.
- The BPN independent assessor will review the portfolio of learning prior to the Q & A session. They will prepare areas for questioning following the review of the apprentice's portfolio of learning.
- The apprentice must give a presentation lasting between 10 -12 minutes based on their workplace project. This is followed by 10 minutes of questions from the BPN independent assessor relating to the project report and the presentation. This questioning session is followed by questions on other areas of the standard not covered by workplace project and presentation. This questioning session will last between 20 – 22 minutes with an expectation of approximately 5 minutes per knowledge area of the standard.
- Questions will be determined by the BPN independent assessor and will be dependent on the evidence presented during the presentation and the project report as well as the portfolio of learning. The evidence from the project report, presentation and questioning will be assessed holistically, using the grading criteria for the SBP standard, as shown in appendix B and the Assessment Plan.

## The Portfolio of Learning

EPA gateway requirements include a Portfolio of Learning. The Portfolio of Learning must be compiled during the on-programme period, with evidence demonstrating **all** KSBs. Whilst not assessed by the EPAO, the portfolio of learning will underpin the EPA project report, presentation and Q&A completed during the EPA period.

Detailed guidance on the portfolio of learning is available within appendix D1

BPN provide a document cover sheet (Appendix D2) to support the apprentice's explanation of how the document provides evidence of any KSB claimed. An example of a document cover sheet is provided (through shared documents on ACE360) to apprentices registered with us. BPN also provide a portfolio of learning document tracker (Appendix D3) that apprentices can use to track coverage of the KSBs against the documents selected.

Training Providers are responsible for ensuring the portfolio of learning is uploaded to the ACE360 system as part of the Gateway and EPA readiness check. Full guidance is provided to enable this.

## When the apprentice will be assessed

The end-point assessment period cannot begin until after the On-Programme training and once the employer has confirmed that the apprentice has met the requirements of the Gateway as contained in the Assessment Plan.

This occurs once the employer is satisfied that:

- the apprentice is consistently working at or above the level set out in the standard
- the pre-requisite gateway requirements for EPA have been met and can be evidenced

Through ACE360, the Training Provider is responsible for notifying BPN that the apprentice is 'Gateway Approved'. This must include the submission of a signed Gateway completion confirmation form (Appendix F)

BPN then check all required documentation. Once all is agreed and accepted, BPN set the apprentice status to 'EPA Ready'. This is the start of the 8 week window for EPA.

Assessments will typically be scheduled within weeks 4-7 of this 8 week window, allowing a week at the end to rearrange assessments in the case of postponements due to unforeseen circumstances.

BPN expect that Gateway assessment will occur at, or towards the end of, an 18-month training programme, with a minimum training period of 12 months.

BPN anticipates that apprentices will complete both assessment methods on the same day, however this is not a requirement, allowing flexibility and efficiency in scheduling for individual circumstances that might arise.

## Where the apprentice will be assessed

In order to reduce travel time for the apprentice and to provide a familiar environment, we aim to assess apprentices at the training provider or employer setting. This will be subject to the employer:

- Stating their preferred setting, and
- Meeting our expectations of a quiet, comfortable and appropriately resourced setting for the assessment, including good access to wi-fi and ICT facilities suitable for the apprentice's presentation.
- Ensuring appropriate staff are available to support the Independent End-Point Assessor (IEPA) on the day of the assessment.

To support this, BPN provides an employer confirmation of setting request form (Appendix E) that the employer must complete. This must be submitted through ACE360 before a provisional date for assessment can be agreed.

Where assessment is not undertaken at the training provider or employer setting, BPN will arrange a suitable venue with ease of access for the apprentice, providing clear detail and description of travel options and arrangements on arrival.

In rare and exceptional circumstances and upon request, BPN will liaise with the employer and apprentice to make alternative arrangements for assessment, in line with the apprenticeship standard assessment plan.

## How BPN ensure high-quality independent assessors

We believe the quality of our assessments is underpinned by selecting and training only the best Independent End-Point Assessors (IEPA) who have significant experience in the field of school business management or leadership. Our assessors will:

- be Fellows or members of the Institute for School Business Leadership
- be trained by an independent high-quality trainer of EPA assessors
- receive ongoing assessment and standardisation training from the BPN programme manager and Lead Assessors
- be independent of the employer, the apprentice and the training provider
- be internally quality assured by BPN
- be externally quality assured by the Institute of Apprenticeships QA Agent

## How BPN ensure the quality of the resources used for EPA

BPN appointed a working party to design all documentation and resources for SBP L4 end-point assessment including on-programme support. The working party consisted of national experts on SBM related programmes, led by:

Our School Business Professional programme manager who is a Fellow of ISBL, a former ASCL Business Leadership Specialist, a highly experienced assessor and moderator of SBM qualifications and recipient of the 2018 ISBL CEO award for exceptional contributions to the profession, and

Our subject matter expert (SME) who is also a Fellow of ISBL, Chief Finance & Operations Officer for a Multi-Academy Trust and who is also a recipient of the ISBL CEO Special Award for exceptional service to the profession in November 2018.

The outcomes of the working party are internally quality assured and externally quality assured by the EQA appointed by the Institute for Apprenticeships and Technical Education.

## How apprentices are supported for end-point assessment

We believe the key to maximising the potential for an apprentice to perform to the best of their ability on the day of assessment, is to help them to be fully prepared in terms of what to expect.

BPN will provide training providers of registered apprentices with the following resources before they approach gateway assessment:

### General

- A 'word' version of all appendices within this guidance document.
- Access to our office-based EPA assessment team to answer any additional questions.
- Access to our special circumstances and disability co-ordinator to ensure any required special arrangements are considered, agreed and implemented.
- Access to our office-based ICT team and to the ACE360 support desk

### Workplace Project

- Guidance on the workplace project and workplace project report (Appendix C1)
- Additional guidance on how to approach the workplace project report
- A bank of workplace project synopses to illustrate a range of viable approaches
- One completed example of a project proposal form
- A template project proposal form (Appendix C2)
- A template for the project report (Appendix C3)
- A guidance sheet on how to prepare for the workplace project presentation

### Portfolio of learning

- A document cover sheet template to support the apprentice's explanation of how the document provides evidence of any KSB claimed (Appendix D2)
- An example of a Portfolio of Learning document cover sheet
- A document tracker form that apprentices use to track coverage of the KSBs against the documents selected (Appendix D3)

## Simulated Task

- A guidance document on how to prepare for the simulated task
- A cover sheet with instructions and suggested webpages to visit during the simulated task
- Two examples of simulated task scenarios with guidance on how to approach

## Confirmation required before a BPN assessment can be arranged

Before a date can be *confirmed* for End Point Assessment, BPN requires verification through Appendix F, that the apprentice:

- has completed a portfolio of learning, containing 10-12 discrete pieces of evidence, compiled during the on-programme period, with evidence of demonstrating the knowledge, skills and behaviours (KSBs) and including evidence of 360° feedback.
- has completed a workplace project based on two of the following knowledge areas of the standard; finance, procurement, human resources, managing support services, marketing and infrastructure.
- has completed a workplace project based on one significant piece of work completed in the workplace **or** has completed a number of smaller pieces of work in cases where the work-based environment has not presented the opportunity for one large piece of work that covers a minimum of two areas of the standard.
- has achieved a level two qualification in maths and English, as a minimum.
- is consistently working at or above the level set out in the standard.
- has completed a minimum of 12 months of training

## The timelines for engagement with BPN as the EPAO

The standard timeline is:

- Employer selects BPN as the EPAO.
- BPN contracts with the training provider through a Service Level Agreement (SLA). This forms a general contract between the two parties
- BPN issues a contract schedule to enable the contracting and pricing for specific individuals or groups of apprentices, detailing start and expected gateway dates.
- BPN liaises with the training provider to transfer or collect relevant apprentice details.
- The Apprentice is registered with BPN through ACE360
- Training Provider, Employer or Apprentice, submits a workplace project proposal form to BPN who return the proposal form with feedback within seven working days.
- The Employer notifies BPN of its preference for assessment location i.e. at the training provider, employers setting or at a setting selected by BPN. BPN provide clear guidance on setting requirements that the training provider / employer must agree to (Appendix E).

- Training provider or employer informs BPN of the anticipated Gateway assessment date at least two months in advance of the scheduled Gateway Assessment.
- BPN begins provisional arrangements to identify an assessor and possible dates for the EPA, subject to the apprentice successfully meeting gateway requirements. This provisional date will be communicated to and agreed with the apprentice/ employer / training provider, before gateway assessment.
- Training provider or employer confirms the date of the expected Gateway Assessment at least two weeks in advance.
- Through ACE360, the Training provider changes the status of the apprentice to 'Gateway Approved' and verifies to BPN that all requirements of the Gateway assessment have been met (through submitting appendix F).
- Apprentice must complete their workplace project report within 2 weeks of their Gateway Assessment.
- Training provider or employer must verify that both the project and the project report are the apprentices own work. They must also confirm that the project report was completed post-gateway (Appendix C4).
- BPN receives payment of the assessment fee.
- BPN will provide appropriate notice of the EPA test day within 10 days after completed submission of the project report.
- EPA test day takes place typically within 8 weeks of the Gateway assessment, usually within weeks 4-7 of the window.
- Our assessor will grade the assessment activity as fail, pass or distinction. To achieve a pass, apprentices must achieve at least a pass in both assessment methods.
- The outcomes of end-point assessment are communicated to the apprentice / employer / training provider in line with internal and external quality assurance processes, within 6 weeks of assessment.

## What happens if an apprentice does not meet requirements for a pass?

Our aim is to provide a high-quality assessment service that includes a focus on high-quality preparation in order to maximise the potential for apprentices to engage with the end point assessment to the best of their abilities. We understand, of course, that not all apprentices will pass first time. Where a 'fail' occurs, employers can be assured that any fail will be internally moderated by BPN. If confirmed as a fail, we will provide clear feedback to the apprentice and employer regarding the reasons for a fail and clear guidance regarding their options for next steps.

Apprentices who fail one or more of the assessment methods are allowed to re-sit or a re-take.

A re-sit does not require further learning whereas a re-take does. It is recommended that apprentices wait for one month before re-taking to allow the development of knowledge, skills and behaviours that were found to be lacking. The assessment plan is clear that the employer should support the apprentice with the further learning required.

## Note on accessibility

If an apprentice has any impairment, special educational need or disability that will affect their ability to participate in the programme, they can make this known to the programme manager or **Jemma Hagan** (Disability Coordinator) so that the appropriate support can be provided.

## BPN fees for end-point assessment

Our fee for end-point assessment is £894 per apprentice.

Our assessment fees for a resit or a retake depend on which elements of the assessment process need to be repeated in order to provide an opportunity to pass. Some apprentices may only need to resit or retake 1 of the following, others may need to resit or retake 2 or all three of the following.

A resit or retake of the Simulated Task, (1.5 hours to prepare a short-written report which will be presented verbally, 10 minutes for verbal presentation and 10 – 12 minutes for questions; all completed on the same day), will incur a fee of £350

A resit or retake of the Project Report & Presentation with Questions & Answers related to the Project and the 2 core areas linked to the project, will incur a fee of £250

A resit or retake of Questions and Answers focused on core areas not covered by the Project Report & Presentation will incur a fee of £100

## BPN End Point Assessment Policies

Our End Point Assessment policies are available on our website at [www.bestpracticenet.co.uk/end-point-assessment](http://www.bestpracticenet.co.uk/end-point-assessment)

These include policies on:

Conflict of Interest

Reasonable Adjustments

Internal Quality Assurance

Fair Access

Maladministration and Malpractice

Appeals

Complaints Handling

## Next steps

We hope that the content of this guidance document provides confidence in the quality and integrity of our end point assessment service and of Best Practice Network as an organisation. If you now wishes to engage Best Practice Network as the EPAO or have any further questions, please contact our assessment team at [epa@bestpracticenetwork.co.uk](mailto:epa@bestpracticenetwork.co.uk) or by phone 01179 209421. We would be delighted to hear from you.

## Appendices

This abbreviated web version of the guidance document does not contain the following appendices. These are available within the full version. Please contact [epa@bestpracticenetwork.co.uk](mailto:epa@bestpracticenetwork.co.uk)

Appendix A – Knowledge, skills and behaviours

Appendix B Grading criteria and bands

Appendix C1 - Guidance on the workplace project and report

Appendix C2 - Workplace project proposal form

Appendix C3 - Workplace project report template

Appendix C4 - Workplace project report submission form

Appendix D1 – Portfolio of learning guidance document

Appendix D2 – Portfolio of learning document cover sheet

Appendix D3 - Portfolio of learning document tracker

Appendix E - Employer assessment setting request form

Appendix F - Gateway completion confirmation form