EPA GUIDANCE FOR TRAINING PROVIDERS & EMPLOYERS

Level 3 - Business Administrator
AP03

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(INSIDE COVER)

CONTENTS

INTRODUCTION

Welcome to the CMI Live Assessment Guidance for the L3 Business Administrator Apprenticeship Standard. This Guidance is designed for both Training Providers and Employers. It includes an outline of all you need to know to ensure readiness of your apprentice(s) for their end-point assessment.

OCCUPATIONAL PROFILE

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.

OVERVIEW - L3 BUSINESS ADMINISTRATOR END POINT ASSESSMENT

The Business Administrator apprenticeship is a minimum of 12 months and provides a highly transferable set of knowledge, skills and behaviours, which can be gained working across an organisation and its processes. The apprenticeship provides the apprentice with a firm grounding in organisational operations and functional processes, as well as the wider working environment.

Key information:
- Reference: ST0070
- Date Approved For Delivery: 18 September 2017
- Typical duration to Gateway (I.e. excluding EPA period) : 18 months
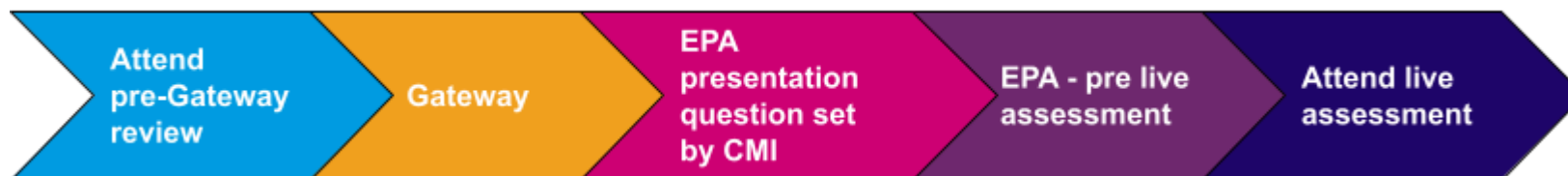- Maximum funding: £5000

End Point Assessment (EPA) can only be triggered after 12 months of starting the apprenticeship and is dependent on when the employer and training provider decide the apprentice is ready.
It is expected that the EPA will typically be concluded within 3 months of passing Gateway.

ENDPOINT ASSESSMENT TIMELINE

This is where the Apprentice, the Training Provider and the Employer agree the Apprentice is ready for their endpoint assessment. It is also where CMI find out what type of project the Apprentice completed so we can set their EPA presentation title question.

This is the EPA stage of the Apprentice's journey

| Attend pre-Gateway review | Gateway | EPA presentation question set by CMI | EPA - pre live assessment | Attend live assessment |

Between Gateway and the live assessment, the Apprentice will typically pass their knowledge test and write their EPA presentation

End Point Assessment for L3 Business Administrator is designed to synoptically assess all of the knowledge, skills and behaviors within the Standard *(see annex 1 for a breakdown of how each KSB is assessed)*. It has 3 assessment methods which are completed post-Gateway.

- **Assessment Method 1:** Knowledge Test. The apprentice is required to complete a 50 question multiple-choice test which is expected to last a maximum of 60 minutes. All questions are equally weighted and have four possible answers. **NOTE: This assessment method should typically be completed and passed before the apprentice progresses to the interview and presentation at their live assessment.**
- **Assessment Method 2:** Project/Process Improvement Presentation with questions and answers. The apprentice will need to deliver their 10-15 minute presentation, based on the project they completed whilst on-programme. Apprentices are required to complete this presentation post-gateway after they have received the title question which is set by CMI, as the EPAO, once Gateway has been approved. This presentation is then followed by a 10-15 minute question and answer session
- **Assessment Method 3:** Portfolio-based Interview. The apprentice will need to participate in a 30-45 minute interview which will be based on the evidence submitted within their showcase portfolio

The CMI EPA Team, as the Endpoint Assessment Organisation (EPAO), will contact the apprentice and their employer post-Gateway by email to:

- Confirm Gateway has been approved and highlight what to expect as part of their endpoint assessment
- Confirm the date and time of their live assessment. The live assessment (LAD) will be about 2.5 hours so a time-slot of 3 hours will have been set

OVERALL GRADING DECISION AND FEEDBACK

The apprentice is required to successfully complete and pass ALL 3 assessment methods and their overall grade is based on the following criteria:

- **To achieve a pass overall, the apprentice must achieve at least a pass in their knowledge test and have met all of the pass descriptors in their presentation and their portfolio-based interview.**
- **To achieve a distinction overall, the apprentice must achieve a distinction in their knowledge test and have met all of the pass descriptors plus all of the distinction descriptors in their presentation and their portfolio-based interview.**

Note: The following grade boundaries apply to the knowledge test:

Grade	Minimum score	Maximum score
Referral / Fail	0	29
Pass	30	39
Distinction	40	50

If, after the EPA, the apprentice has not met all of the pass descriptors in either the presentation or the portfolio-based interview assessment methods they will initially be recorded as **REFERRED** and will be offered the opportunity to re-sit or re-take.

- Apprentices will be required to resit or retake only the assessment method(s) they have been referred on.
- A resit does not require further learning, whereas a retake does.
- Apprentices should have a supportive action plan that has been set by their Training Provider and based on the feedback provided by CMI, as the EPAO. This supportive action plan needs to enable the apprentice to prepare for their resit or a retake. The apprentice's employer will need to agree that either a resit or retake is an appropriate course of action.
- Resits and retakes are not offered to apprentices wishing to move from pass to distinction.

Note: If CMI has not been contacted by the Training Provider, Employer or Apprentice within 10 working days of a REFERRAL outcome, and/or if the Apprentice and their Employer chooses to not resit or retake any referred assessment elements then their overall grade for their apprenticeship programme will be reported to the ESFA as a FAIL.

ASSESSMENT METHODS

ASSESSMENT METHOD 1 - KNOWLEDGE TEST

A multiple-choice test consisting of 50 equally weighted questions, with 4 possible answers, and expected to last a maximum of 60 minutes, and:

- Is a closed-book assessment which is completed online, within the CMI EPA Portal (CMI Assess), and invigilated by the Training Provider or Employer.
- Consists of 50 questions covering the following KSBs within the Standard:
    - Project Management: Undertakes and leads projects as and when required
    - Organisation: Understands organisational purpose, activities, aims, values, vision for the future, resources and the way that the political/economic environment affects the organisation
    - 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.)
    - Relevant Regulations: Understands laws and regulations that apply to their role including data protection, health & safety, compliance etc.
    - Business Fundamentals: Understands the applicability of business principles such as managing change, business finances and project management.
    - External Environment Factors: Understands relevant external factors e.g. market forces, policy & regulatory changes, supply chain etc

The test comprises several question styles, including:

Question Style	Format
Standard	A standard question that usually begins with "What," "Who", "Why", or "How often". *(E.g.: When is the..? Which is a characteristic of...? How often does..? What role ....?)*
Negative	A standard question that uses a negative word in the question stem. *(E.g.:Which statement is not a..?)*
Missing Word(s)	A statement or sentence where the Apprentice has to identify the missing word/words/word(s)/phrase. *"....text......[?] ......text......"*
Select (List)	A question that asks the Apprentice to evaluate four statements and identify which are correct. *The commonly used format is: 'Which of the following....'*
Select (Evaluate)	A question that asks the Apprentice to evaluate two statements and determine whether they are true or false. *The standard format is: 'Which of the following statements about ... are true? Option 1. Statement 1; Option 2. Statement 2'*

ASSESSMENT METHOD 2: PROJECT/PROCESS IMPROVEMENT PRESENTATION WITH QUESTIONS AND ANSWERS

The End Point Assessment (EPA) requires the apprentice to prepare and deliver a presentation (followed by questions and answers) based on their project undertaken whilst on-programme. The project is submitted to the EPAO at gateway who then provides a title question to answer in the presentation. This assessment method will typically last 30 minutes (the presentation lasts 10-15 minutes, with a further 10-15 minutes for a Q&A session)..

Apprentices are required to deliver a presentation to CMI, as the EPAO, on either a project they have completed, or a process they have improved. This activity will have been completed prior to Gateway so they can then prepare and deliver their presentation as part of their EPA. Please ensure that apprentices check their Student Page as soon as possible after Gateway as this is where CMI will confirm which of the 2 options was selected at Gateway and is where we will let them know the question title for their EPA Presentation.

Their EPA Project/Process improvement should be::
- Submitted to CMI at gateway - either in the portfolio of evidence or as a separate piece.
- Will need to include information about why the activity needed to be undertaken, what their role was, what they did when preparing for and during this activity, and the outcome plus lessons learned.
- The presentation should last 10-15 minutes.
- Have either a mapping document or method that shows which of the relevant knowledge, skills and behaviours each slide relates to.

CMI has created a checklist below to help you in preparing your apprentices for their EPA Presentation.

Is their EPA Presentation about a: - Process or Operating Procedure that they have improved? - Project they led that related to a work-based issue or need?	
Have they logged into their Student Page to check the title question for their EPA presentation?	

Does their presentation include all of the key points listed on their Student Page?
  -   What type of activity?
  -   Their role?
  -   What did they do?
  - The outcome, including key recommendations and lessons learned	

Is it clear to see which knowledge, skills, and behaviours are covered by their EPA Presentation?	
Did they use presentation slide software, such as Microsoft PowerPoint, Google Slides, KeyNote, Prezzi to complete this activity?	
Have they practised their presentation to ensure it lasts 10-15 minutes?	

Following the presentation, the CMI IAA will ask the apprentice a minimum of 4 questions, with one question from each of the following KSB groups. Follow up questions can be used to seek clarification and/or to stretch the apprentice to a distinction.

CMI BA Presentation KSB Group	Relevant Pass Grading Descriptor(s):	Relevant Distinction Grading Descriptor(s):
Processes	Understands and consistently follows the organisation's processes (e.g. making payments or processing customer data) (K15.1) Makes suggestions for small improvements and supports on successful implementation (K15.2)	Understands and follows organisational processes and promotes them adherence and improvements (K15.1) Able to identify inefficiencies or ineffectiveness in a process and support on successful implementation (K15.2)
Interpersonal skills	Works effectively with a range of people (includes building and maintaining positive relationships within their own team and across the organisation). (S4.1) Influences and challenges peers when necessary (S4.2)	Influences managers as well as peers (S4.1) & Constructively challenges managers, as well as peers, when necessary (S4.2)
Planning and Organising	Plans work and achieves deadlines (S7.1) Shares areas to improve plans with others (S7.2) Effectively manages resources and meetings (S7.3) Takes responsibility for logistics and can provide examples (S7.4)	Makes plans that efficiently maximise resources and personally ensures results are achieved (S7.1) Improves the management of resources e.g. identifies cost savings or process improvements (S7.2) Proactive in taking responsibility for areas of logistics and has excellent examples to demonstrate this (S7.3)
Project Management	Effectively plans and manages small project (S8.1) Able to lead small projects when required (S8.2) Demonstrates some understanding of project management tools and principles.(S8.3)	Plans and manages a significant project and can describe what made it a success (S8.1) Demonstrates strong leadership skills when managing a project (S8.2) Understands and is able to apply a strong grasp of project management tools and principles (S8.3)

Decision making skills	Decisions are thought through, using a range of information to make a sound judgement.(S3.1) Challenges appropriately and is polite when doing so (S3.2) Seeks advice of more experienced team members when appropriate.(S3.3)	Decisions are continuously made by thoughtfully considering different information and the risks of any actions (S3.2) & Consistently behaves and seeks advice in a mature way.(S3.4)
Responsibility	Accepts personal responsibility for their own work, delivering their work on time and to the right level of quality (B21.1) Demonstrates ownership and willingness to see work completed (projects are successfully completed and customer requests handled appropriately) (B21.2)	Role model who takes personal responsibility for themselves and peers (B21.1) Aims to deliver work within targets and deliver more than required in their role (B21.2)
Personal Qualities	Regularly shows integrity, reliability, positivity and self-motivation (B18.1)	Always shows integrity, reliability, positivity and self-motivation and successfully encourages others to show more of these qualities (B18.1)

Please be aware that during the delivery of the presentation and questioning it is recommended that the apprentice has access to their presentation slides and/or speaker notes/aides to act as prompting notes.

ASSESSMENT METHOD 3: PORTFOLIO-BASED INTERVIEW

All apprentices are required to prepare a portfolio of evidence during the on-programme phase of their apprenticeship, which showcases their best work.
    Their portfolio:
- Must be submitted at Gateway for review by the CMI IAA before the live assessment
- Must include a mapping document (*see CMI Portfolio Evidence Locator template)* which clearly shows how the evidence is mapped against the relevant knowledge, skills and behaviours for this assessment method.
- Is expected to be at least 8-12 pages.
- Must have at least one piece of evidence mapped to each of the relevant knowledge, skills and behaviours, and be predominantly made up of validated work-based examples and/or activities
- Is not directly assessed, but will be reviewed ahead of the live assessment and underpins the interview.

How does the EPA Showcase Portfolio differ from a Traditional Summative Portfolio?

Traditional Summative Portfolio	Showcase Portfolio
Predominantly knowledge-based *(Academic assignments, qualification workbooks, on-programme learning modules)*	Predominantly skills-based *(Work-based examples/activities supported by contextualisation statement & validated using witness testimonies/observations)*
Evidence is automatically selected as the apprentice progresses through their on-programme learning activities	Evidence is selected by the apprentice to 'showcase' their best work and the key activities that are most relevant to them
Usually includes in excess of 50 pieces of evidence	The L3 Business Administrator Assessment Plan advises the portfolio should typically be at least 8-12 pages
The apprentice usually struggles to be able to recollect what is in their portfolio when questioned at live assessment	The apprentice not only knows exactly what is in their portfolio but also why, and can discuss the evidence in-depth at their live assessment

What is meant by 'one piece' of evidence?

IfATE has provided the following guidance:
- One piece of evidence can take either of the following 2 formats:
  - It could be a single thing or activity, such as a Feedback Report, a 'Thank-you email' or an observation
  - It could also be a combination of 2-3 things that are all related and when combined provide full coverage of a relevant learning outcome, area or grading descriptor within the Standard

Gathering evidence for the portfolio

Encourage your apprentices to **collect evidence for the portfolio as they go** - it will make their life easier. It is useful to include what evidence they have/haven't got as part of the regular reviews conducted throughout the on-programme phase of the Apprenticeship Programme.
- Does the evidence that they have selected really **showcase their best work**?
- Is the evidence triangulated - does it show what they learned/did, how they did it and include some form of validation to confirm that they did it?
- **Has all of the evidence been mapped**? How easy is it for someone else to find and see exactly what KSBs the evidence is mapped to? (CMI provides an Evidence Locator Template, found within MyCMI, that clearly shows the KSBs, and enables the Apprentice to identify what is mapped, and its location (including page number, paragraph and/or time-stamp)
- Are there any KSBs and/or Grading Descriptors that they **still need to find evidence for**?
- Can they **explain and discuss with confidence**, what they have learned/done, how it relates to their role as a Business Administrator and how it meets the grading descriptors within the assessment plan?

At the live assessment, the apprentice will be required to complete their portfolio-based interview which is expected to last between 30-45 minutes and includes a minimum of 4 questions with follow up questions to clarify or expand understanding and will be based on the IAAs review of the apprentice's portfolio of evidence. The portfolio-based interview will assess the apprentice's knowledge and understanding of the evidence submitted in their portfolio to validate competence. It also provides an opportunity for the apprentice to reflect upon their performance and show how they have applied the knowledge gained whilst on-programme to demonstrate the appropriate skills and behaviours.

CMI recommends apprentices use the STAR technique when answering their interview questions.
- **Situation** - what activity or task is it that you want to use to demonstrate competence in this area of the Standard?
- **Task** - what was the goal that you wanted to achieve?
- **Action** - what did you do? (remember to use 'I' and not 'we' or 'my team'
- **Result** - what was the outcome of this activity or task, and how does it relate to the relevant area of the Standard?

The CMI IAA will ask the apprentice a minimum of 4 questions, with one question from each of the following KSB groups. Follow up questions can be used to seek clarification and/or to scratch the apprentice to a distinction.

CMI BA Portfolio-based Interview KSB Group	Relevant Pass Grading Descriptor(s):	Relevant Distinction Grading Descriptor(s):
Organisational context (K9.1, K12.1, K12.2, K13.1, K16.1, K16.2)	**The Organisation:** - Shows a working knowledge of the organisations purpose, aims and ways of working, putting it in context of the local (or sector) environment (K9.1) **Relevant regulation:** Understands laws and regulations that apply to their role (including data protection, health & safety, compliance etc).(K12.1)	**The Organisation:** Shows a thorough understanding of the organisation's purpose, aims and way of working (K9.1) **Relevant regulation:** Shows a thorough understanding and Champions adherence to relevant laws and regulation within the organisation (K12.1, K12.2)

	Supports the company in applying the regulations.(K12.2) **Policies:** Understands the organisation's internal policies and key business policies relating to sector.(K13.1) **External environment factors:** Understand the external factors affecting the organisation and how they relate to their role. (e.g. market forces, policy & regulatory changes, supply chain etc. and the wider business impact).(K16.1)	**Policies**: Understands and promotes the organisation's internal policies (K13.1) **External environment factors:** Shows a deep understanding of the external factors facing the organisation and how they relate to their role (Where necessary understands the international/global market in which the employing organisation is placed.)(K16.1) Seeks additional information about how those factors are developing (K16.2)

| Personal & Professional Development (B17.1, B17.2, B19.1, B19.2, B19.3 B20.1, B21.3, K10.1, K10.2, K10.3) | **Value of their skills:** Understands the structure of the organisation and how their work contributes (K10.1) Identifies their role within the team and value of their skills.(K10.2)

Managing Performance: Clarifies requirements and takes responsibility for work produced (includes knowing when to ask questions and informing manager when a task is complete) (B19.1) Acts with responsibility and delivers their work to the right level of quality without requiring additional supervision and coaching (B19.2) Asks for feedback and takes feedback on board (includes using initiative and showing resilience, complying with organisation and taking responsibility for own development) (B19.3)

Adaptability: Accepts and responds positively to change (includes changing priorities related to both their own work and to the organisation) (B20.1)

Responsibility: Applies initiative in developing their own skills and behaviours (B21.3)

Professionalism: Consistently behaves in a professional way, showing punctuality, respect for others and personal presentation (includes: personal presentation, respect, respecting and encouraging diversity to cater for wider audiences, punctuality and attitude to colleagues, customers and key stakeholders).(B17.1) Follows the standard of conduct required by the organisation (B17.2) | **Value of their skills:** Understands the structure of the organisation and is able to discuss how different teams support each other (K10.1) Identifies their role within the team and is able to compare their skills with others (K10.2) Understands the contribution their work makes and promotes its value (K10.3)

Managing Performance: Shows a strong personal responsibility for all aspects of their work and can work with minimal supervision, whilst adhering to policies, procedures and standards.(B19.1) Takes feedback on board and continually assesses the quality of their work (B19.2)

Adaptability: Accepts change, evaluates the impact of any change and seeks to use it to improve their work (B20.1)

Responsibility: Proactively seeks opportunities to develop themselves and shares this learning with others (B21.3)

Professionalism: Is a role model employee, showing professionalism in their conduct, punctuality, presentation and respect for others, irrespective of background; even in difficult circumstances (B17.1) Can be relied upon to represent the team and be an ambassador for the organisation (B17.2) |
| --- | --- | --- |
| | (S5.1) - The Apprentice demonstrates they can communicate clearly, in both written and verbal communication (S5.2) - The Apprentice shows flexibility to different situations (S5.3) - The Apprentice uses appropriate communication channels dependent on the subject matter (S5.4, S5.5) - The Apprentice demonstrates ability to answer | (S5.1, S5.2) - The Apprentice's communication is consistently clear, both written and verbally (S5.3) - The Apprentice champions an appropriate choice of communication channels (S5.4, S5.5) - The Apprentice consistently answers queries from both inside and outside of the organisation in a confident way |

	queries effectively from both inside and outside the organisation	
Quality Record and Document Production, with the use of I.T. *(S1.1, S1.2, S2.1, S2.2, S2.3, S6.1, S6.2, S6.3, S6.4)*	**Record and Document Production:** Records are accurate, rarely require correction and are treated confidentially (including: producing emails, letters, files, payments, reports and proposals) (S2.1) Recommendations and solutions only need minor improvements (includes presenting solutions to management) (S2.2) Supports others in producing documents and can provide examples.(includes reviewing others work) (S2.3) **Quality:** Checks own work before submission and makes improvements (includes applying themselves to continuously improve their work).(S6.1) Work is largely accurate and meets expectations (includes completing to a high standard) (S6.2) Identifies areas for improvement and can justify why.(includes reviewing processes and making suggestions) (S6.3) Promotes best practice examples of administration, such as accurate records.(S6.4) **IT:** Demonstrates they can use IT packages, specifically to write letters or emails, and to record and analyse information (including the ability to update and review databases, record information and produce data analysis where required).(S1.1) Able to perform tasks relevant to their role using IT packages without supervision (includes being able to choose the most appropriate IT solution to suit the business problem).(S1.2)	**Record and Document Production:** Records are consistently accurate and confidential (S2.1), Their recommendations are insightful, clearly recorded and result in a clear benefit to the organisation (S2.2.) They offer to coach others and good performance is recorded in feedback (S2.3) **Quality:** They take ownership for work and applies processes for checking work (S6.1) Work is consistently accurate and meets the agreed outcomes (S6.2) They recommend and implement process improvements (S6.3) They proactively offer to coach others in an area of work and communicates requirements for work (S6.4) **I.T.** Consistently demonstrates they can use IT packages and can provide varied, quality examples (S1.1) Able to perform tasks relevant to their role using IT packages and can coach others in using IT (S1.2)
Effective Communication and Stakeholder Management *(S4.3, S5.1, S5.2, S5.3, S5.4, K11.1, K11.2, B17.1, B17.2)*	**Stakeholders:** Understands how to manage stakeholders, e.g. clarifying and delivering on expectations (this includes internal and external customers, clients and/or suppliers).(K11.1) Demonstrates they have worked with stakeholders to achieve results (includes liaising with internal/external customers, suppliers or stakeholders from inside or outside the UK). (K11.2)	**Stakeholders:** Understands and follows the principles of stakeholder management and Goes beyond expectations to build constructive relationships with stakeholders (K11.1 & K11.2) **Interpersonal skills:** Proactively offers to coach others and has had good performance recorded in feedback (S4.3)

	Interpersonal skills: Supports others in the organisation and demonstrates coaching skills. (becomes a role model to peers and team members, developing coaching skills as they gain area knowledge).(S4.3) Communications: Demonstrates they can communicate clearly, in both written and verbal communication (includes whether face-to-face, on the telephone, in writing or on digital platforms) (S5.1) Shows flexibility to different situations (demonstrates agility and confidence in communications, carrying authority appropriately) (S5.2) Uses appropriate communication channels dependent on the subject matter (includes use of social media solutions appropriately) (S5.3)" Demonstrates ability to answer queries effectively from both inside and outside the organisation.(S5.4)	Communications: Communication is consistently clear, both written and verbally (S5.1) Champions an appropriate choice of communication channels(S5.2) Consistently answers queries from both inside and outside of the organisation in a confident way (S5.3)

You can help your apprentices to prepare for their portfolio-based interview by:
● Making sure they know exactly what evidence was submitted within their portfolio, and are able to explain why each piece of evidence was chosen and what area(s) of the Standard it has been mapped to.
● Getting them to write some prompting notes against each of the areas of the Standard that they can refer to during the interview
● Arranging for them to complete a mock interview with you.

PREPARING YOUR APPRENTICES FOR THEIR LIVE ASSESSMENT

In order to ensure readiness for this important stage of their apprenticeship, CMI recommends apprentices use the time between completing their presentation and their live assessment to:
● Practice the presentation, making sure they keep to time and are covering all of the relevant grading descriptors within the KSB groups.
● Prepare for their portfolio-based interview by reviewing the information that they submitted at gateway to identify how it meets the relevant KSBs and the pass/distinction grading descriptors.
● Create some prompting notes to use during their live assessment that identifies how their presentation and/or the piece(s) of evidence in their portfolio demonstrates their competence in a particular area/KSB group/grading descriptor.
● Check the the Google hangout link in their CMI Live Assessment invite is working and attend a CMI EPA Test Call

What To Expect On The Day
The live assessment is the only opportunity your Apprentice(s) have to showcase their competence in the knowledge, skills and behaviours for assessment method 2 and assessment method 3 within the L3 Business Administrator apprenticeship standard.

The live assessment requires the Apprentice to:
● Deliver their 10-15-minute presentation. This will be followed by a 10-15-minute question and answer

session about the presentation, their project and the relevant KSBs.
- Participate in a 30-45-minute interview, based on the evidence submitted in their showcase portfolio to demonstrate their competence in the relevant KSBs and grading descriptors.

The date of the live assessment will have been booked and confirmed at Gateway, and is usually within 4 weeks of gateway. It will be conducted remotely, usually via Google Hangouts, and will be with the Apprentice and the CMI IAA.

Before the live assessment can start, the CMI IAA will introduce themselves before:
- Reminding the apprentice of what is going to happen
- Explaining how long the assessment will typically last
- Checking the apprentice's ID - so please make sure they have some form of photo ID ready
- Confirming that the apprentice does not have any unseen help in the room
- Advising the apprentice that the session will be recorded.

Note: that the recording of the live assessment is mandated within the publish assessment plan, and is used for quality assurance and moderation purposes only. Also, as the live assessment is between your Apprentice and the CMI IAA we need to ensure there is no-one else attending the meeting and/or in the room, and that the Apprentice is not making any recordings of the activity and/or planning to share any of the questions asked with their Employer or their Training Provider.

CMI has created a handy checklist (copy below) to share with the Apprentice when preparing for their live assessment day:

Is the room, where they are doing their live assessment from, somewhere that is free from distractions, and outside noise?	
Does the room or area have a good wifi and/or internet signal?	
Does the Apprentice understand how to use Google Meets, and has a laptop or a computer with a webcam, microphone and speakers?	
Does the Apprentice know that they are able to take something to drink into their live assessment? (CMI recommends Apprentices have either a hot drink or a glass of water with them as their live assessment will typically last about 2.5 hours.)	
Has the Apprentice got their prompting notes and/or speaker notes to refer to?	
Does the Apprentice have some form of photo ID that they can show to the CMI IAA? (Typically the most commonly used forms of ID used are a passport, a driving licence, or a work ID card. Whatever is used MUST clearly include a valid up to date photo and their name. If an Apprentice does not have any form of photo ID then they need to ask their Training Provider and/or Employer to contact the CMI EPA Team as soon as possible.)	

Please note, that the CMI IAA:
- Has been contracted by CMI to conduct this endpoint assessment and is not able to answer any questions or queries you or the Apprentice may have about the process. (If you do have any questions or concerns then please contact the CMI EPA Team as soon as possible.)
- Will have already reviewed the portfolio ahead of the live assessment to identify what questions they wish to ask following the presentation, and what areas they want to cover within the professional discussion.
- Will not be able to give the Apprentice any indication on how they have done, or what their overall result will be at the end of the live assessment.

CMI recommends that all apprentices should have been given the opportunity to practice their EPA as part of a mock end point assessment activity before undertaking their live assessment.

With this in mind we have created a mock EPA for you to use with your Apprentice(s). This mock EPA includes:

- A copy of the mock knowledge test, which is also available within the Student Page in CMI Assess
- A mock presentation title question
- Sample questions that can be asked as part of the question and answer session following the Apprentice's presentation
- Sample questions that can be used as part of a mock portfolio-based interview, based on the evidence being submitted within their showcase portfolio
- Check-lists that you can use with your Apprentice(s) as part of their EPA

NOTE: As a mock EPA this is a chance for your Apprentice(s) to practice and become familiar with the EPA experience. The role of the Assessor will need to be played by someone within your organisation, as this mock endpoint assessment cannot be assessed, marked or graded by someone from CMI. Finally, the result the Apprentice achieves in their mock EPA will have no bearing on the outcome and/or the overall grade of their actual live EPA.

KNOWLEDGE TEST MOCK QUESTION BANK

Question 1	Which of the following describes a project?	
It is a temporary undertaking, carefully planned to achieve a particular aim		Y
It is a fixed process, and guarantees a successful outcome		N
It is an ongoing activity, that changes as new opportunities are identified		N
It is a timetabled activity that happens annually, quarterly, monthly etc.		N

Question 2	Within a project, who is responsible for championing the work and owning the business case?	
The Project Sponsor		Y
The Project Manager		N
The Project Team		N
The External Stakeholders		N

Question 3	Which of the following are known as the 'Triple Constraints' within a project? (i.e. the three most significant constraints to any project) 1. Quality 2. Scope 3. Time 4. Cost	
2, 3, and 4		Y

1, 2, and 4	N
1, 3, and 4	N
1, 2 and 3	N

Question 4	Which of the following best describes the purpose of a project scoping document? (Note: This document can sometimes be called a Project Charter)	
It is an overview of the project, that reiterates the need for the project, and includes what its deliverables and objectives are.		Y
It is a non-negotiable document, and lists the costs and resources needed for a successful project		N
It is an initial draft for the project, and includes a possible timeline that will need to be adjusted or adapted once executed.		N
It is the main document used when monitoring a project, and can sometimes be used instead of and/or replaces the need for a business case.		N

Question 5	Which of the following is NOT a commonly used project planning tool?	
Profit & Loss Account		Y
SWOT Analysis		N
RACI Matrix		N
GANTT chart		N

Question 6	What planning activity requires tasks to be allocated to individuals in order to get an overview of their availability and capacity?	
Resource planning		Y
Operational planning		N
Financial planning		N
Contingency planning		N

Question 7	What is the most important reason for regular accurate monitoring and reporting in project management?	
To identify problems as soon as possible and inform decision making		Y
To ensure everyone always has the most up to date information		N
To update the project plan and risk register		N
To ensure that levels of trust remain high between the project manager and the project sponsor		N

Question 8	Which of the following statements about project completion are true?
	    1. The project aims and objectives have been achieved
	    2. The project is recorded to have been a success	

Only 1 is true		Y
Neither 1 or 2 is true		N
Both 1 and 2 are true		N
Only 2 is true		N

Question 9	Identify the missing words in the following sentence. Projects are set to fail if they're not led properly. It is the role of the [?] to come up with a plan to achieve the goals of the project, and to manage the team assembled to complete those tasks.	
Project manager		Y
Project sponsor		N
Project steering committee		N
External stakeholders		N

Question 10	Which is a fundamental skill of a good project leader?	
Excellent communication and interpersonal skills		Y
Strong sense of self worth and self belief		N
Ambitious goals for personal development		N
Relaxed attitude and caring nature		N

Question 11	Business administrators need to be able to build relationships with their peers, their colleagues and their customers. What role does emotional intelligence play in supporting this skill?	
It helps you be more aware of your own and other people's emotions and behaviours		Y
It enables you to absorb large quantities of information quickly and accurately		N
It allows you to capture and retain key facts relating to your colleagues and customers		N
It improves your ability to manage time sensitive tasks and meet deadlines		N

Question 12	In a business context, who are defined as stakeholders?	
Anyone that has an interest in a company and can either affect or be affected by the business.		Y

Only those people that purchase goods or services from a business	N
Just the vendors that sell products and services to the business	N
Anyone that currently works, has worked, or wishes to work in an organisation	N

Question 13	What does it mean to liaise with your customers?	
You are required to build and maintain customer satisfaction by working together, keeping each other informed about what is happening, and being the main point of contact.		Y
You are required to constantly engage and actively seek to influence your customer into using your products and/or services.		N
You are required to remotely monitor and report upon your customer's buying activity and habits.		N
You are required to have a 'hands-off approach' when dealing with your customers and to mandate the use of self-service support functions.		N

Question 14	Identify the missing words in the following sentence. Employees of an organisation are considered to be [?], as they are directly impacted by its strategy and success as well as having some influence in the decision making process.	
Internal stakeholders		Y
External stakeholders		N
Financial shareholders		N
Emotional stakeholders		N

Question 15	Which of the following would be considered to be an external stakeholder within an organisation?	
Suppliers		Y
Owners		N
Managers		N
Employees		N

Question 16	Which of the following would be considered an internal stakeholder within an organisation?	
The IT Department		Y
The Company Auditors		N
The Stationery Supplier		N

The Sandwich van	N

Question 17	You work for an executive airport transportation organisation and one of your main roles is contacting the drivers to confirm which airport, the date/time of the collection, and the name of the customer. One of your drivers has been late for their last three pickups. What would be the most appropriate method for dealing with this relationship?
Contact the driver to understand the reason(s) why they were late before escalating the issue to your line manager.	Y
Email the driver to advise that they will not be paid for these collections as punishment for being late.	N
Contact the accounts department to request a full refund for the customers impacted.	N
Contact the customer to make them aware that the issue was not your fault as you had emailed the driver with the details of the collection.	N

Question 18	You work in a retail company and your manager has asked you to send the weekly sales figures to the Head Office. Which would be the most appropriate way of doing this?
By email	Y
By post	N
By phone call	N
By text message	N

Question 19	Which of the following is a key skill, and is required to effectively manage and build healthy stakeholder relationships?
Communication	Y
Contract Writing	N
Project Management	N
Team Leadership	N

Question 20	There has been a significant change in one of your day-to-day activities that impacts all of your customers. You have chosen to conduct a stakeholder analysis to identify which of your customers need to be informed of this change. Which of the following statements would be true?
	    1. Those stakeholders falling into the section 'High Power, High Interest' are key so should be contacted about the change as soon as possible.
	    2. Those stakeholders falling into the section 'Low Power, Low Interest' are less important so it is easier to contact them about the change before anyone else.

Only 1 is true	Y

Only 2 is true	N
Both 1 and 2 are true	N
Neither 1 or 2 is true	N

Question 21	Who is responsible for health and safety within your organisation?

Everyone - all employees within your organisation are required to carry out certain actions in order to meet health and safety requirements, and to protect themselves plus everyone they work with.	Y
The Health & Safety Manager - it is their job to protect everyone within your organisation and at all times.	N
The Human Resources Manager - as the person who is in charge of the department that deals with the employment, training, and support, they are legally required to also manage health and safety within the workplace.	N
The Health and Safety Executive - as the regulator whose aim is to prevent workplace death, injury or ill health, they are also responsible for everyone's health and safety within your organisation.	N

Question 22	Identify the missing words in the following sentence. Under the [?] regulations, employers are required to either prevent, reduce or at the very least, control exposure to hazardous substances.

Control of Substances Hazardous to Health	Y
Care of Staff, Customers and General Public	N
Control of Spillages, Leakages and Waste	N
Containment of Solids, Fluids and Other Objects	N

Question 23	According to RIDDOR (Reporting of Injuries, Diseases and Dangerous Occurrences Regulations 2013), which of the following is not a legal requirement for a company employing more than 10 people?

The need to report all employee absence	Y
The need to report all accidents and injuries within the workplace	N
The need to report when a serious accident has been avoided	N
The need to retain a file or accident book within the workplace	N

Question 24	Which of the following are required by General Data Protection Regulations (GDPR) for any company whose core activity consists of regular or systematic processing of personal data? 1. The clear disclosure of any data collection

	2. To employ a Data Protection Officer 3. To report any data breaches within 72 hours 4. To delete all personal data records within 2 weeks of someone leaving the organisation	
1, 2, and 3		Y
1, 2, and 4		N
1, 3, and 4		N
2, 3, and 4		N

Question 25	Under the Data Protection Act, how long does an organisation have to respond to a 'Subject Access Request (SAR)' by an individual?	
1 month		Y
3 months		N
2 weeks		N
5 days		N

Question 26	Which regulation requires organisations to protect their employees from the risk of injury resulting from the transportation (lifting, putting down, pushing, pulling, carrying or moving) of loads within the workplace?	
Manual Handling		Y
Reporting of Injuries, Diseases and Dangerous Occurrences Regulations		N
Employment Law		N
Personal Protective Equipment		N

Question 27	What regulation legally protects people from discrimination in the workplace and in wider society?	
Equality Act		Y
Employment Law		N
Anti-Discrimination Act		N
Equal Pay Act		N

Question 28	Who needs to carry out a Display Screen Equipment (DSE) assessment?	
Anyone who is regularly using a display screen/computer at work should have one.		Y
Only those people that use a tablet or laptop, and if they do not have access to a monitor		N

Anyone that needs to wear glasses	N
Only those people that use a computer for more than 5 hours per day	N

Question 29	Which of the following is not considered to be one of the main hazards within an office-based workplace?	
Burns		Y
Slips		N
Trips		N
Falls		N

Question 30	Which of the following is not a characteristic that is covered under the Equality Act?	
Pay		Y
Age		N
Disability		N
Race		N

Question 31	Which of the following is not considered to be a type of organisational structure?	
Triangular		Y
Matrix		N
Hierarchical		N
Flat		N

Question 32	Which of the following statements about public sector businesses are true: 1. Public sector businesses are owned and run by the government and funded by the taxpayers. 2. Public sector businesses are there to provide a service for people and aim to provide the best possible service to the community. 3. Public sector businesses are funded with money that is provided by the interest charged on loans made to private businesses.	
Only 1 and 2 are true		Y
Only 1 and 3 are true		N
Only 2 and 3 are true		N
1, 2 and 3 are true		N

Question 33	The financial statement that summarises the revenues, costs, and expenses incurred during a specified period (such as a financial year or quarter) is known as?	
A profit and loss statement		Y
A balance sheet		N
A forecast		N
A budget statement		N

Question 34	Which of the following does not describe the purpose of a balance sheet?	
It is a statement that shows how much profit has been made by a business.		Y
It is a summary of what assets are owned by a business and what liabilities the business owes.		N
It is a report used by a business to demonstrate financial stability.		N
It is a set of financial accounts prepared by a business as part of their end of year activities.		N

Question 35	Which of the following statements about change management are true? 1. Organisational change refers to the actions in which a company or business alters a major component of its organisation, such as its culture, the underlying technologies or infrastructure it uses to operate, or its internal processes. 2. Change management is the discipline that guides how we prepare, equip and support individuals to successfully adopt change in order to drive organisational success and outcomes.	
Both 1 and 2 are true		Y
Only 2 is true		N
Only 1 is true		N
Neither 1 or 2 is true		N

Question 36	Your manager has asked all employees within your department to attend a meeting as they want to explain the upcoming financial year's operational plan. Which of the following would be the desired outcome of this meeting?	
For everyone in the department to understand how they will contribute to the delivery of your organisation's strategic goals		Y
For all team leaders and managers to know what objectives they need to set for their employees during the coming year		N

For everyone to be given a list of all of the areas requiring improvement and development within your department	N
For you to update the reporting dashboard and then use this to monitor the Key Performance Indicators (KPIs) set by the organisation	N

Question 37	Which of the best describes the purpose of a mission statement?
It's a statement that is action-oriented and explains a company's purpose.	Y
It is a statement that explains what a company aspires to be.	N
It is a statement that lists the core ethics or principles which a company will abide by, no matter what.	N
It is a statement that defines how everyone is expected to behave within a company.	N

Question 38	Identify the missing word in the following sentence. "We are passionate about providing the best care for all our patients" is an example of a [?] statement?
Value	Y
Mission	N
Vision	N
Culture	N

Question 39	Which organisational statement provides a concrete way for stakeholders, especially employees, to understand the meaning and purpose of their business?
Vision	Y
Value	N
Culture	N
Mission	N

Question 40	Which of the following is not one of the 7 R's of Change Management?
Rate	Y
Risks	N
Relationship	N
Responsible	N

Question 41	Which is an appropriate tool for analysing the external environment of your organisation?	
PESTLE		Y
KPI		N
SMART		N
GANTT		N

Question 42	What would the main consequences be on your organisation if a direct competitor opened in the same small town as you?	
Competition for staff, upward pressure on salaries, downward pressure on prices		Y
Additional training, revision of policies, inspection/monitoring of processes		N
Redundancies, cost cutting measures, focus on core business, merger and/or acquisition		N
Shift in focus on the growth, innovation and resources for all non-core activities		N

Question 43	Which of the following is recognised as an external factor that affects business?	
Politics		Y
Processes		N
Finances		N
Culture		N

Question 44	What external factors are the following examples of - employment law, consumer protection law, and copyright and patent laws?	
Legal factor		Y
Environmental factor		N
Political factor		N
Social factor		N

Question 45	What does the 'S' in PESTLE stand for?	
Social		Y
Specialised		N
Significant		N
Sector		N

Question 46	GDP is a measure of the size and health of a country's economy over a period of time, and is also used to compare the size of different economies at a different point in time. What does GDP stand for?	
Gross Domestic Product		Y
Good Distribution Practice		N
Global Detection Probability		N
Global Data Pool		N

Question 47	Which of the following are internal environmental factors? 1. Corporate image 2. Economic situation 3. Operational efficiency 4. Human resources	
1, 3 and 4		Y
1, 2 and 3		N
1, 2 and 4		N
2, 3 and 4		N

Question 48	Which of the following is recognised as an external factor that affects business?	
Political		Y
Process		N
Professional		N
People		N

Question 49	Which of the following is NOT an accurate example of market forces in action?	
An increase in sales tax or value added tax will guarantee more revenue for the government		Y
As the need for artificial intelligence experts increases this means their salaries will generally rise.		N
The price of oil across the world rises when major war breaks out in the Middle East.		N
Cold weather in the summer in Spain causes an increase in the price for tomatoes in the UK.		N

Question 50	Which external factors are the following examples of - temperature, food, pollutants, population density, sound, light, and parasites?	
Environmental		Y

Political	N
Economical	N
Social	N

PRESENTATION & QUESTIONING (10-15 minutes to present, then 10-15 minutes for Q&A - 4 questions)

Title/Question To Answer: How I improved an operating procedure within my organisation?

Presentation needs to include slides that cover:
- What the original operating procedure was, and why it needed improving
- What the apprentice's role was in this operating procedure improvement activity
- What the apprentice did when preparing for, and then during this improvement activity
- A summary of the outcome of this improvement activity, including key recommendations and lessons learned
- How this improvement activity maps to the relevant knowledge, skills and behaviours for this EPA assessment method

Opening questions post-delivery
1. Describe in detail the project management tools you used during this activity and why
2. What approach did you take when making decisions during this activity, and why?
3. In your opinion, what was the biggest impact this activity had on your organisation?
4. Explain how you demonstrated responsibility and ownership behaviours during this process/project

Note: These are not the actual questions asked by CMI at EPA. The actual questions asked are based on the apprentice's presentation at their live assessment. Please ensure the apprentice uses examples from the above presentation to answer the above mock questions (and then examples from the real presentation to answer the questions asked at their live assessment).

PORTFOLIO-BASED INTERVIEW (30-45 minutes - 4 questions)
1. Describe in detail the structure of your organisation and how your role supports its strategic objectives? *(Probe to draw out any key internal policies, and laws/regulations that they need to adhere to and why, plus the external factors that affect their role.)*
2. Describe how you ensure you use the most appropriate communication style, channel and method when working with different audiences? *(Probe to draw out the different methods used, how they flexed to different situations, how they adapted their communications for internal/external stakeholders.)*
3. What IT and/or software packages have you used within your role as an Administrator? *(Probe to draw out why they needed to use different IT software packages and ask for an example of when they have coached others to use this software.)*
4. What do you consider are the traits required of someone who is a role model to others? *(Probe to draw out whether they believe they are a role model administrator and why. You may also need to ask a question about how they took the lead in their own personal/professional development.)*

Note: These are not the actual questions asked by CMI at EPA. The actual questions asked are based on the Independent Assessor's assessment of the apprentice's portfolio of evidence so you will need to ensure the apprentice uses the examples within their portfolio to answer the above mock questions (as well as the ones asked at their live assessment).

GLOSSARY OF KEY TERMS

End Point Assessment EPA)	Rigorous robust and independent assessment undertaken by an apprentice at the end of training to test that the apprentice can perform in the occupation they have been trained in and can demonstrate the knowledge, skills and behaviours (KSBs) set out in the occupational standard
End-point assessment organisation (EPAO)	An organisation approved to deliver end-point assessment for a particular apprenticeship standard; EPAOs must be on the register of end-point assessment organisations
Gateway	The stage of the apprenticeship where it is agreed by the Employer, Training Provider and Apprentice that the Apprentice has the knowledge, skills and behaviours required in the Apprenticeship Standard, and can prove this at EPA
Independent Apprenticeship Assessor (IAA) / Independent End Point Assessor (IEPA)	An assessor independent from the on-programme delivery of the Apprenticeship who assesses the competence of the apprentice during the activities set out in the published Assessment Plan
Institute for Apprenticeships and Technical Education (IfATE)	('the Institute') – the body responsible for improving the quality of apprenticeships in England
Knowledge, skills and behaviours (KSB's)	What is needed to competently undertake the duties required for an occupational standard
Live Assessment Day (LAD)	The point at which the live assessment methods are carried out in front of an Independent Apprenticeship Assessor, such as the interview and project presentation
Occupational standard	The document that details what someone competent in the occupation does and the knowledge, skills and behaviours they require to do it; the basis for apprenticeship standards and T-levels
On-programme activities	Activities carried out during the time of the apprenticeship supported by the training provider and employer through training and resources

KEY TERMS WITHIN THE KNOWLEDGE TEST

Area of the Standard	Key Term
Project Management	Roles within a project Project planning tools, including SWOT Analysis, RACI Matrix, Gantt Chart Resource planning Scheduling KPIs Work Breakdown Structure PERT PRINCE2
The Organisation	Organisational structures Types of organisations

Stakeholders	Internal/external stakeholders
Relevant Regulations	Health & Safety At Work Act COSHH RIDDOR GDPR, including subject access requests Equality Act DSE assessment Manual handling Working Time Regulations Consumer Rights Act Employment Law
Business Fundamentals	Public vs Private sector Commonly used financial statements, including P&L, Balance Sheet Change management, including 7 R's Mission, vision, values Shannon & Weaver ADKAR Break even point Zero-Hours contracts USP Fixed vs variable costs
External Environment Factors	PESTLE

ADDITIONAL LINKS
[IfATE Assessment Plan](#)
Skills Scan Template
Performance Review Template
Portfolio Evidence Locator Template
Presentation Evidence Locator Template

Standard	PASS Learning Outcome	Distinction Learning outcome	KSB Ref	AM1 Presentation with Questioning	AM2 Portfolio Based Interview	AM3 Knowledge Test
KNOWLEDGE **What is required (in-depth knowledge of organisation and wider business environment)**						
The organisation	Shows a working knowledge of the organisations purpose, aims and ways of working, putting it in context of the local (or sector) environment	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	K9.1		✔	
	Provides some understanding of the political and economic environment		K9.2			✔
Value of their skills	Understands the structure of the organisation and how their work contributes	Understands the structure of the organisation and is able to discuss how different teams support each other	K10.1		✔	
	Identifies their role within the team and value of their skills.	Identifies their role within the team and is able to compare their skills with others	K10.2		✔	
		Understands the contribution their work makes and promotes its value	K10.3		✔	
Stakeholders	Understands how to manage stakeholders, e.g. clarifying and delivering on expectations	Understands and follows the principles of stakeholder management	K11.1		✔	✔
	Demonstrates they have worked with stakeholders to achieve results	Goes beyond expectations to build constructive relationships with stakeholders	K11.2		✔	
Relevant regulation	Demonstrates knowledge of relevant laws and regulation and consistently follows them.	Shows a thorough knowledge of relevant laws and regulations and consistently follows them	K12.1		✔	✔
	Supports the company in applying the regulations.	Champions adherence to relevant laws and regulation within the organisation	K12.2		✔	
Policies	Understands and follows the organisation's internal policies	Understands and promotes the organisations internal policies	K13.1		✔	
Business fundamentals	Knows the fundamentals of business, including finances, managing change and project management	Knows the fundamentals of business, can relate them to their administrative occupation and show how they make an impact	K14.1			✔

Processes	Understands and consistently follows the organisation's processes	Understands and follows organisational processes and promotes them adherence and improvements	K15.1	✔		
	Makes suggestions for small improvements and supports on successful implementation	Able to identify inefficiencies or ineffectiveness in a process and support on successful implementation	K15.2	✔		
External environment factors	Understand the external factors affecting the organisation and how they relate to their role.	Shows a deep understanding of the external factors facing the organisation and how they relate to their role	K16.1		✔	✔
		Seeks additional information about how those factors are developing	K16.2		✔	✔

SKILLS
What is required (advancing key skills to support progression to management)

IT	Demonstrates they can use IT packages, specifically to write letters or emails, and to record and analyse information (including the ability to update and review databases, record information and produce data analysis where required.)	Consistently demonstrates they can use IT packages and can provide varied, quality examples	S1.1		✔	
	Able to perform tasks relevant to their role using IT packages without supervision (includes being able to choose the most appropriate IT solution to suit the business problem.)	Able to perform tasks relevant to their role using IT packages and can coach others in using IT	S1.2		✔	
Record and document production	Records are accurate, rarely require correction and are treated confidentially	Records are consistently accurate and confidential	S2.1		✔	
	Recommendations and solutions only need minor improvements	Recommendations are insightful, clearly recorded and results in a clear benefit to the organisation	S2.2		✔	
	Supports others in producing documents and can provide examples	Offers to coach others and good performance is recorded in feedback	S2.3		✔	
Decision Making	Decisions are thought through, using a range of information to make a sound judgement	Decisions are timely and consistently show good judgement	S3.1	✔		
	Challenges appropriately and is polite when doing so	Decisions are continuously made by thoughtfully considering different information and the risks of any action	S3.2	✔		
	Exercises sound judgement when asking for advice by	Decisions are fully evidenced and justifiable	S3.3	✔		

Category	Pass	Distinction	Code				
	choosing the appropriate time, manner and person						
		Consistently behaves and seeks advice in a mature way	S3.4	✓			
Interpersonal skills	Works effectively with a range of people	Influences managers as well as peers	S4.1	✓			
	Influences and challenges peers when necessary	Constructively challenges managers, as well as peers, when necessary	S4.2	✓			
	Supports others in the organisation and demonstrates coaching skills	Proactively offers to coach others and has had good performance recorded in feedback	S4.3		✓		
Communications	Demonstrates they can communicate clearly, in both written and verbal communication	Communication is consistently clear, both written and verbally	S5.1		✓		
	Shows flexibility to different situations	Champions an appropriate choice of communication channels	S5.2		✓		
	Uses appropriate communication channels dependent on the subject matter	Consistently answers queries from both inside and outside of the organisation in a confident way	S5.3		✓		
	Demonstrates ability to answer queries effectively from both inside and outside the organisation		S5.4		✓		
Quality	Checks own work before submission and makes improvements	Takes ownership for work and applies processes for checking work	S6.1		✓		
	Work is largely accurate and meets expectations	Work is consistently accurate and meets the agreed outcomes	S6.2		✓		
	Identifies areas for improvement and can justify why	Recommends and implements process improvements	S6.3		✓		
	Promotes best practice examples of administration, such as accurate records	Proactively offers to coach others in an area of work and communicates requirements for work	S6.4		✓		
Planning and organisation	Plans work and achieves deadlines	Makes plans that efficiently maximise resources and personally ensures results are achieved	S7.1	✓			
	Shares areas to improve plans with others	Improves the management of resources e.g. identifies cost savings or process improvements	S7.2	✓			

	Effectively manages resources and meetings	proactive in taking responsibility for areas of logistics and has excellent examples to demonstrate this	S7.3	✔		
	Takes responsibility for logistics and can provide examples		S7.4	✔		
Project management	Effectively plans and manages small projects	Plans and manages a significant project and can describe what made it a success	S8.1	✔		✔
	Able to lead small projects when required	Demonstrates strong leadership skills when managing a project	S8.2	✔		✔
	Demonstrates some understanding of project management tools and principles	Understands and is able to apply a strong grasp of project management tools and principles	S8.3	✔		✔

BEHAVIOURS
What is required (Role-model behaviours and positive contribution to culture)

Professionalism	Consistently behaves in a professional way, showing punctuality, respect for others and personal presentation	Is a role model employee, showing professionalism in their conduct, punctuality, presentation and respect for others, irrespective of background; even in difficult circumstances	B17.1		✔	
	Follows the standard of conduct required by the organisation	Can be relied upon to represent the team and be an ambassador for the organisation	B17.2		✔	
Personal qualities	Regularly shows integrity, reliability, positivity and self-motivation	Always shows integrity, reliability, positivity and self-motivation and successfully encourages others to show more of these qualities	B18.1	✔		
Managing performance	Clarifies requirements and takes responsibility for work produced	Shows a strong personal responsibility for all aspects of their work and can work with minimal supervision, whilst adhering to policies, procedures and standards	B19.1		✔	
	Acts with responsibility and delivers their work to the right level of quality without requiring additional supervision and coaching	Takes feedback on board and continually assesses the quality of their work	B19.2		✔	

	Asks for feedback and takes feedback on board		B19.3		✔	
Adaptability	Accepts and responds positively to change.	Accepts change, evaluates the impact of any change and seeks to use it to improve their work	B20.1		✔	
Responsibility	Accepts personal responsibility for their own work, delivering their work on time and to the right level of quality	Role model who takes personal responsibility for themselves and peers	B21.1	✔		
	Demonstrates ownership and willingness to see work completed	Aims to deliver work within targets and deliver more than required in their role	B21.2	✔		
	Applies initiative in developing their own skills and behaviours	Proactively seeks opportunities to develop themselves and shares this learning with others	B21.3		✔	