

L3 Business Administrator APPRENTICESHIP HANDBOOK

An overview and guide for Apprentices
and Employers

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INTRODUCTION

Occupational Profile

Welcome to the CMI Qualification Specification document for the L3 Business Administrator Occupational Standard. This document has been developed to help you, as a potential apprentice or employer of an apprentice, to choose your end point assessment organisation and/or to answer any questions you may have regarding undertaking an apprenticeship.

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.

Qualification Details

| IfATE Occupational Standard | Apprenticeship Qualification Title | Ofqual Qualification Reference Number |
|--|------------------------------------|---------------------------------------|
| ST Code: ST0070 | CMI Level 3 Business Administrator | 610/0205/7 |
| Date Approved For Delivery: 18 September 2017 Latest version: AP03 31/05/2022 Typical duration to Gateway (excluding EPA period): 18 months Maximum funding: £5000 | | |

The qualification reference number is the number allocated to CMI by Ofqual, as the regulator of qualifications, examinations and assessments in England, on approval of our recognition to undertake endpoint assessments for this occupational standard.

WHAT TO EXPECT

The Apprenticeship Journey

Your end-to-end apprenticeship journey is likely to be split into the following 5 stages:

| | |
|---|---|
| Choosing Your Programme and Training Provider | <p>See the UCAS Apprenticeship page or the Gov.uk Find An Apprenticeship page for more information and/or to find possible apprenticeship opportunities within your area.</p> <p>Apprentices need to be currently working in the role of a professional manager (see notes above regarding the occupational standard).</p> <p>Apprentices need to live and/or work in England to be eligible for their employer to utilise their levy funding.</p> |
| Completing The On-Programme Assignments, Modules, and Activities | <p>This is when apprentices develop the knowledge, skills, and behaviours (KSBs) of the occupational standard. It is also where apprentices complete their on-programme activities and are working towards English and mathematics level 2, if required.</p> <p>Towards the end of their on-programme activities, apprentices will need to have completed their portfolio of evidence.</p> <p>The typical duration for this stage of the journey is 12-18 months.</p> |
| Passing Through Gateway | <p>Gateway is the point of the journey where apprentices move from learning to demonstrating the knowledge, skills, and behaviours (KSBs) within the occupational standard.</p> <p>Before an apprentice is able to undertake their end point assessment (EPA), their employer must confirm that the apprentice is working consistently working at, or above, the level of the occupational standard and has a English and mathematics Level 2 qualification.</p> <p>At Gateway, apprentices must submit:</p> <ul style="list-style-type: none"> • A portfolio of evidence and associated mapping document • Confirmation if the project presentation is a Process improvement or Business issue/need. |
| Undertaking Your End Point Assessment (EPA) | <p>End Point Assessment (EPA) is the final stage of the actual apprenticeship journey and is where the apprentice will be tested by an independent apprenticeship assessor to determine whether they are able to demonstrate the knowledge, skills, and behaviours within the occupational standard.</p> <p>EPA can only be triggered after 12 months of starting the apprenticeship, and for the L3 Business Administrator Apprenticeship it requires the apprentice to have successfully completed all of their on-programme activities, plus have a level 2 qualification in English and mathematics.</p> <ul style="list-style-type: none"> - Assessment method 1: Knowledge Test (20%) - Assessment method 2: Portfolio-based Interview (40%) - Assessment method 3: Project/Improvement Presentation (40%) <p>Typical duration of end point assessment is 4 - 6 weeks culminating in a live assessment activity lasting no more than 2 hours.</p> |

Your Options after EPA

Ongoing personal and professional development is an essential skill and/or requirement of every manager and leader.

CMI, as a professional body, is committed to turning accidental managers into conscious leaders and supports its members in their ongoing continued professional development. CMI is the only chartered body that can award Foundation Chartered Manager and its Management Diagnostics provides a valuable self-assessment tool that enables its members to understand what good looks like and know how to develop the skills employers need now and in the future.

Other technical education options following end point assessment include completing another apprenticeship (either in management and leadership or your industry specialism), or considering a specialism higher technical qualification.

END POINT ASSESSMENT

What is an endpoint assessment and why is it needed?

End point assessment is the terminology used by IfATE to describe the period post-Gateway and put simply is what the apprentice needs to do at the end of their apprenticeship programme. Its aim is to test the apprentice's competence in the knowledge, skills and behaviours (KSBs) within the occupational [L3 Business Administrator occupational standard](#)

End point assessment usually requires the apprentice to complete a number of different activities, called assessment methods, and is carried out by an End Point Assessment Organisation, such as CMI, who are independent to the Training Provider and Employer.

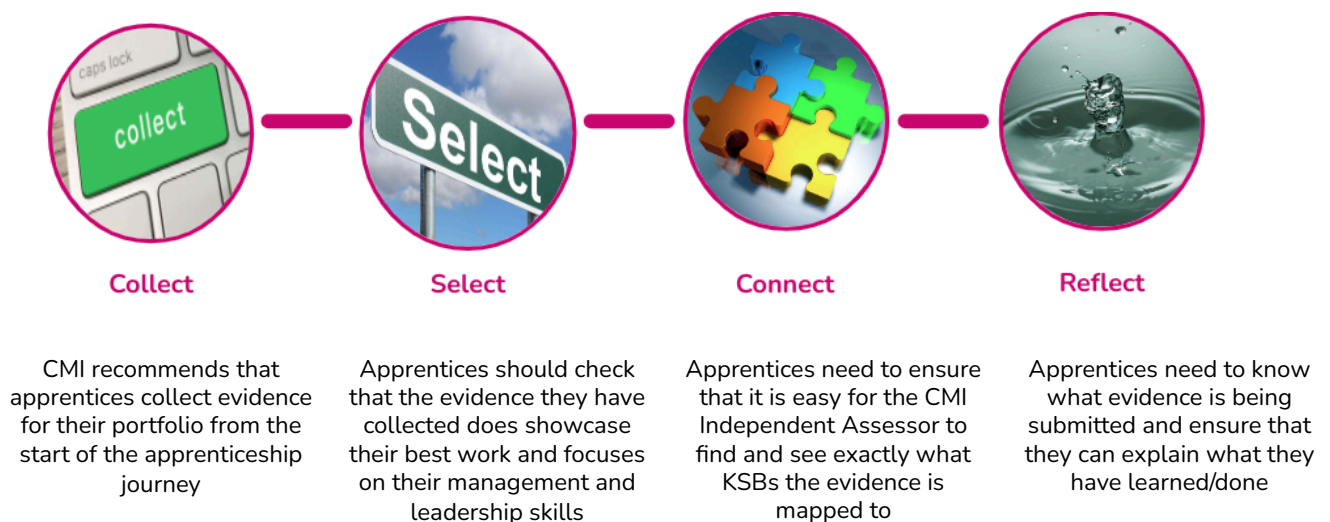
The end point assessment for the [L3 Business Administrator](#) is synoptic, meaning that it has been designed to test all of the knowledge, skills and behaviours within IfATE's occupational standard ST0070 and seeks to discern the breadth and depth of topics/area covered in this standard. It has the following assessment methods:

- **Assessment method 1: Knowledge Test**
- **Assessment method 2: Portfolio-based Interview**
- **Assessment method 3: Project/Improvement Presentation**

Things to need to know about when creating your portfolio of evidence

Whilst it is not assessed, the portfolio of evidence is used to underpin the professional discussion assessment. Apprentices are required to complete their portfolio of evidence whilst on-programme which is submitted as part of the Gateway requirements.

Please see below some useful hints and tips on gathering evidence for an end point assessment portfolio



The portfolio of evidence for [L3 Business Administrator](#) needs to cover all of the KSBs within the portfolio-based interview assessment method, and should predominantly be real work-based examples that have been validated by a third-party, such as their line manager or using a witness testimony.

The image below explains the importance of triangulating evidence used within a portfolio of evidence:



This is why CMI recommends that as an apprentice you:

- Take a qualitative, as opposed to a quantitative, approach when gathering evidence for your portfolio. Each piece of evidence needs to focus on your role and activities as a manager or leader, and will typically cover multiple KSBs.
- Showcase your 'best' work, including any key achievements whilst on-programme, and/or from within your day to day activities.
- Include a separate evidence locator document within your portfolio that clearly identifies which KSBs each piece of evidence is mapped to. **(NOTE: CMI has a template that they share with Training Providers, for apprentices to use as part of their prompting notes within the live assessment activity and to ensure all of the KSBs have been evidenced.)**

Things you need to know about 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.

It is expected that the Level 3 Business Administrator EPA knowledge test should typically be passed before the apprentice progresses to their live assessment day (LAD), 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 all relevant areas within the Standard, including Project Management, The Organisation, Stakeholders, Relevant Regulation, Business Fundamentals, External Environment
Is set at a level expected through a Level 3 Diploma (or equivalent) or from training of an equivalent standard, quality and scope.

Things you need to know about the assessment method 2 - 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.

Things you need to know about the assessment method 3 - Project Presentation with questioning

The End Point Assessment (EPA) requires the apprentice to prepare and deliver a presentation (followed by questions and answers) on a project they have completed or a process they have improved. The project is submitted to the EPAO who provides a 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 to check the 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 you know the question for the EPA Presentation.

Please note 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.

The overall grading decision

The knowledge test should typically be passed, before progressing to interview and presentation. All methods are weighted equally. Grade boundaries are provided for each method.

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.

The CMI IAA will grade each of the relevant assessment elements (except for the Knowledge Test) and assigns a mark of between 1 and 5 for each learning outcome and/or question asked:

1 = The apprentice was not able to evidence or meet the relevant learning outcome at the level expected within the Standard and/or within the requirements of the FAIL grading descriptors.

2 = The apprentice was only able to partially evidence or meet the learning outcome at the level expected within the Standard and/or within the requirements of the FAIL grading descriptors.

3 = The apprentice was able to evidence and/or meet the learning outcome at the level expected within the Standard and/or demonstrates the skills/behaviours of the PASS grading descriptors.

4 = The apprentice's evidence or answer demonstrates breadth or depth. The apprentice is deemed to have partially exceeded the level expected for this learning outcome within the Standard and is demonstrating a combination of the PASS/DISTINCTION grading descriptors.

5 = The apprentice's evidence or answer demonstrates both breadth and depth. The apprentice is deemed to have exceeded the level expected for this learning outcome within the Standard and demonstrates the skills/behaviours of the DISTINCTION grading descriptors.

Once the IAA has completed all of the relevant assessment elements they can then use this to select their recommended grade for the synoptic assessment:

REFERRED - if there is a query regarding, and/or the apprentice has not met the 50% requirement for one or more of the assessment elements.

PASS - if the overall score is between 60% and 79%.

DISTINCTION - if the overall score is between 80% and 100%.

Note: If the apprentice has not contacted CMI within 10 working days of a REFERRAL outcome, and/or has chosen to not re-sit any referred assessment elements then their overall grade will be reported as FAIL.

Please note that:

- All referral results are communicated to the Employer, Apprentice and Training Provider.
- Apprentices will be required to resit or retake only the assessment method(s) they have been referred on.
- The timescales for a resit/retake are agreed between the employer and CMI, as the EPAO.
- Any assessment method requiring a resit **must be taken within 3 months of the fail notification**, otherwise the entire EPA must be taken again, unless in the opinion of the EPAO exceptional circumstances apply outside the control of the apprentice or their employer.
- Resits and retakes are capped at an overall grade of PASS, unless CMI as the EPAO determines there are exceptional circumstances requiring the resit or retake.

FURTHER INFORMATION

Information Regarding Resits and Retakes

As mentioned above, where an apprentice has not successfully completed any of the criteria required within an assessment method this will initially be notified as a referral and CMI will send further information to the Training Provider detailing the assessment method that needs to be resat/retaken.

The difference between a resit and a retake is that:

- A resit means that the apprentice did not quite meet the knowledge, skill and/or behaviour advised within the CMI feedback report. This typically means that the apprentice may need to find some additional evidence for their portfolio, and/or adjust their presentation before attending a further live assessment activity.
- A re-take means that there are significant gaps in the knowledge, skills and behaviours and it is recommended that the apprentice undertakes further learning before another assessment is taken.

Apprentices who achieve a pass grade cannot ask to re-sit/re-take their end point assessment simply to achieve a higher grade.

Information Regarding Appeals

There may be occasions when CMI make end-point assessment decisions that apprentices find unclear, unfair or believe have caused disadvantage. If this is the case then they have the right to appeal their endpoint assessment grading decision.

Please note that an appeal:

- Can only be submitted once all methods of assessment have taken place and all marks and grades have been recorded and released correctly for each of the end-point assessment components and the overall grade awarded by CMI.
- Is only able to be submitted if the apprentice feels that they were either treated unfairly by CMI and/or the process has not been followed by CMI, which resulted in them being disadvantaged.
- Cannot be submitted to CMI if the apprentice has concerns about their Training Provider, to gain additional feedback from CMI regarding their overall assessment decision, or if the apprentice feels they did not achieve the result that they expected and want their assessment to be remarked.

For further information regarding submitting an appeal, please see the **CMI EPA Enquiries and Appeal Policy** which can be found on our website [here](#)

Information Regarding Reasonable Adjustment Requests

End point assessment should be a fair assessment of an apprentice's knowledge, skills and behaviours, therefore in line with legal and regulatory requirements CMI has the right to make a reasonable adjustment and/or to allow a special consideration in relation to the end-point assessment for all apprenticeship standards that CMI is recognised to provide.

Reasonable adjustments are defined as any action that helps reduce the effect of a disability that places the apprentice at a substantial disadvantage in the assessment situation. They **MUST** be agreed before the assessment takes place to enable the apprentice to demonstrate their knowledge, skills and behaviours.

Special considerations can be applied during the end point assessment period (or post assessment) if there is a reason the apprentice may have been disadvantaged during the assessment period by an event outside of their control. This also includes requests for any extension to end-point assessment deadlines where there are extenuating circumstances (such as apprentice redundancy).

Please note that reasonable adjustments and/or special considerations should not give the apprentice an unfair advantage, and that the apprentice's result must reflect their achievement in the assessment and not necessarily their potential ability.

For further information, please see the **CMI EPA Reasonable Adjustments and Special Considerations Policy** which can be found on our website [here](#)

Information Regarding Recognition of Prior Learning (RPL)

There may be occasions where apprentices are deemed to have Recognition of Prior Learning (RPL). This is usually identified by the Training Provider at the start of the apprenticeship programme, but could also be reviewed during the on-programme stage as a result of the progress reviews. Whilst this is likely to mean that the apprentice doesn't need to complete the relevant module(s) and/or assignment(s) on-programme, they will still need to provide evidence and demonstrate competence in all of the knowledge, skills and behaviours within the [L3 Business Administrator](#) as part of the end point assessment.

APPENDIX 1 - Glossary of Key Terms

| Glossary of Key Words / Phrases Used Within Apprenticeships | Definition and/or Explanation |
|--|--|
| Assessment Component | The different activities that an apprentice has to complete for each assessment method. Typically these components are assessed holistically to determine one overall grading decision. |
| Assessment Method | The actual assessment activities that an apprentice needs to complete and pass as part of their endpoint assessment. |
| Assessment Plan | The document that is published by IfATE (under Crown Copyright) that sets out what needs to be done when testing the competence of an apprentice for that particular standard. |
| Distinct | Recognisably different in nature from something else of a similar type. This phrase is often used to describe either the type of evidence that has been submitted within a portfolio, and/or the different assessment methods. |
| End Point Assessment (EPA) | Rigorous robust and independent assessment of 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. |
| Education and Skills Funding Agency (ESFA) | The Education and Skills Funding Agency is an executive agency of the government of the United Kingdom, sponsored by the Department for Education. |
| 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. |
| Grading Decision | This is the final overall grade for an endpoint assessment. IAAs are required to check the overall grade within the assessment sheet before uploading it to CMI Assess ready for Internal Quality Assurance/release of results. |
| Holistic (or Synoptic) Assessment | Terminology used to identify an assessment method or assessment activity which has a number of components that are assessed as one overall decision. |
| CMI Independent Assessor (IAA) | Terminology used by CMI. The assessor independent from the on-programme delivery of the Apprenticeship who assesses the competence of the apprentice during the end point assessment activities set out in the published Assessment Plan. |
| Interview | IfATE assessment method - usually requires a number of competency based questions to be asked. |
| Institute for Apprenticeships and Technical Education (IfATE) | IfATE (sometimes referred to as 'The Institute') works with employers to develop, approve, review and revise apprenticeships and technical qualifications within England. |
| Knowledge, skills and behaviours (KSBs) | What is needed to competently undertake the duties required for an occupational Standard Knowledge: What the apprentice needs to know and/or understand to complete their apprenticeship successfully. The information, technical detail, and 'know-how' that someone needs to have and understand to successfully carry out the duties. Some knowledge will be occupation-specific, whereas some may be more generic. |

| | |
|---|---|
| | <p>Skills: What an apprentice needs to be able to do. The practical application of knowledge needed to successfully undertake the duties. They are learnt through training or experience.</p> <p>Behaviours: Apprentices need to demonstrate how they have developed and exhibited the behaviours within the occupational standard within the workplace. Whilst they may be innate or intrinsic they can also be learned so are sometimes considered to be an additional subset of skills.</p> |
| Live Assessment Activity (LAD) | The point at which the live assessment methods are carried out in front of an Independent Apprenticeship Assessor, such as the presentation and professional discussion. |
| Occupational (Apprenticeship) Standard | Written and developed by the relevant employer trailblazer group(s) and include the specific Knowledge, Skills and Behaviours (KSBs) needed for specific occupations. The document acts as the basis for apprenticeship standards and T-levels, and aims to put employers in the driving seat for ensuring apprentices are learning skills that are relevant to the workplace. |
| Occupational Profile | This is an overview of the occupation and describes the sector or industries the occupation is typically found in; the broad purpose of the occupation; and what an employee in the occupation would typically do. The newer standards also include the key duties expected of an apprentice by the time they complete their programme, as well as the occupational profile, expected duration, and grading boundary. |
| Portfolio of Evidence | Is a collection of pieces of evidence, gathered together on-programme, that is used as the underpinning basis of an end-point assessment method. |
| On-programme activities | Activities carried out during the time of the apprenticeship supported by the training provider and employer through training and resources. |
| Presentation | IfATE assessment method - presented as part of the live assessment. Typically the presentation is on a set topic or based on a project/activity. |
| Professional Discussion | IfATE assessment method - a two-way discussion between the independent assessor and the apprentice to assess the apprentice's in-depth understanding of their work. It differs from an interview and/or Q&A session as they tend to require the assessor asking questions and the apprentice answering them so there is less scope for interaction and discussion. Apprentices are expected to actively listen and participate in the formal conversation, and use this assessment method as an opportunity to confirm their competency across the relevant KSBs. |
| Question & Answer Session | IfATE assessment method - typically used following a presentation to confirm the assessors understanding of certain KSBs and/or to stretch to a distinction. |
| Referral/Referred | CMI terminology used to indicate that an apprentice has not met all of the KSBs within an assessment method. CMI will need to advise if the referral requires a resit or retake. |
| Resit | IfATE terminology used to indicate that an apprentice did not meet all of the KSBs for a particular assessment method or KSB group. Typically a resit will not require the apprentice to undertake further learning so can be completed within a few weeks of the referral notification. |
| Result | Final grading decision after it has been through our internal quality assurance process. This result is advised to the TP and Apprentice plus sent to ESFA/Ofqual as part of our reporting requirements. |
| Retake | IfATE terminology used to indicate that an apprentice did not meet a number of the KSBs within an assessment method. Typically a retake requires the apprentice to undertake further learning before undertaking their endpoint assessment again. |

APPENDIX 2 - Which KSBs are assessed within each assessment method?

Annex 1: KSBs and their relevant Assessment Method

| Overview of KSBs by Assessment Method | | | | | |
|--|--|-------------|---------------------|--------------------------------|------------------------------------|
| Area of the Standard | Learning Outcome <i>(Note: CMI is now required to assess against the relevant grading descriptors for each KSB)</i> | New KSB Ref | AM1: Knowledge Test | AM3: Portfolio-based Interview | AM2: Presentation with Questioning |
| SKILLS | | | | | |
| What is required (advancing key skills to support progression to management) | | | | | |
| 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.) | S1.1 | | ✓ | |
| | Able to choose the most appropriate IT solution to suit the business problem. | S1.2 | | ✓ | |
| | Able to update and review databases, record information and produce data analysis where required. | S1.3 | | ✓ | |
| Record and document production | Produces accurate records and documents including: emails, letters, files, payments, reports and proposals. | S2.1 | | ✓ | |
| | Makes recommendations for improvements and presents solutions to management. | S2.2 | | ✓ | |
| | Drafts correspondence, writes reports and is able to review others' work. | S2.3 | | ✓ | |
| | Maintains records and files, handles confidential information in compliance with the organisation's procedures. | S2.4 | | ✓ | |
| | Coaches others in the processes required to complete these tasks. | S2.5 | | ✓ | |
| Decision Making | Exercises proactivity and good judgement. | S3.1 | | | ✓ |
| | Makes effective decisions based on sound reasoning and is able to deal with challenges in a mature way. | S3.2 | | | ✓ |
| | Seeks advice of more experienced team members when appropriate. | S3.3 | | | ✓ |
| Interpersonal skills | Builds and maintains positive relationships within their own team and across the organisation. | S4.1 | | ✓ | |
| | Demonstrates ability to influence and challenge appropriately. | S4.2 | | ✓ | |
| | Becomes a role model to peers and team members, developing coaching skills as they gain area knowledge. | S4.3 | | ✓ | |
| Communications | Demonstrates good communication skills, whether face-to-face, on the telephone, in writing or on digital platforms. | S5.1 | | ✓ | |
| | Uses the most appropriate channels to communicate effectively. | S5.2 | | ✓ | |
| | Demonstrates agility and confidence in communications, carrying authority appropriately. | S5.3 | | ✓ | |
| | Understands and applies social media solutions appropriately. | S5.4 | | ✓ | |

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|--|--|-------|---|---|---|
| | Answers questions from inside and outside of the organisation, representing the organisation or department. | S5.5 | | ✓ | |
| Quality | Completes tasks to a high standard. | S6.1 | | ✓ | |
| | Demonstrates the necessary level of expertise required to complete tasks and applies themselves to continuously improve their work. | S6.2 | | ✓ | |
| | Is able to review processes autonomously and make suggestions for improvements. | S6.3 | | ✓ | |
| | Shares administrative best-practice across the organisation e.g. coaches others to perform tasks correctly. | S6.4 | | ✓ | |
| | Applies problem-solving skills to resolve challenging or complex complaints and is a key point of contact for addressing issues. | S6.5 | | ✓ | |
| Planning and organisation | Takes responsibility for initiating and completing tasks, manages priorities and time in order to successfully meet deadlines. | S7.1 | | | ✓ |
| | Positively manages the expectations of colleagues at all levels and sets a positive example for others in the workplace. | S7.2 | | | ✓ |
| | 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). | S7.3 | | | ✓ |
| | Manages resources e.g. equipment or facilities. | S7.4 | | ✓ | |
| | Organises meetings and events, takes minutes during meetings and creates action logs as appropriate. | S7.5 | | ✓ | |
| | Takes responsibility for logistics e.g. travel and accommodation. | S7.6 | | ✓ | |
| Project management | Uses relevant project management principles and tools to scope, plan, monitor and report. | S8.1 | | | ✓ |
| | Plans required resources to successfully deliver projects. | S8.2 | | | ✓ |
| | Undertakes and leads projects as and when required. | S8.3 | ✓ | | ✓ |
| KNOWLEDGE What is required (in-depth knowledge of organisation and wider business environment) | | | | | |
| The organisation | Understands organisational purpose, activities, aims, values, vision for the future, resources and the way that the political/economic environment affects the organisation. | K9.1 | ✓ | ✓ | |
| Value of their skills | Knows organisational structure and demonstrates understanding of how their work benefits the organisation. | K10.1 | | ✓ | |
| | Knows how they fit within their team and recognises how their skills can help them to progress their career. | K10.2 | | ✓ | |
| Stakeholders | Has a practical knowledge of managing stakeholders and their differing relationships to an organisation. (<i>This includes internal and external customers, clients and/or suppliers.</i>) | K11.1 | ✓ | | |
| | Liaises with internal/external customers, suppliers or stakeholders from inside or outside the UK. | K11.2 | | | ✓ |
| | Engages and fosters relationships with suppliers and partner organisations. | K11.3 | | | ✓ |

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|--|--|-------|---|---|---|
| Relevant regulation | Understands laws and regulations that apply to their role including data protection, health & safety, compliance etc. | K12.1 | ✓ | | |
| | 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 | | ✓ | |
| Business fundamentals | Understands the applicability of business principles such as managing change, business finances and project management. | K14.1 | ✓ | | |
| Processes | Understands the organisation's processes (e.g. making payments or processing customer data). | K15.1 | | | ✓ |
| | Is able to review processes autonomously and make suggestions for improvements. | K15.2 | | | ✓ |
| | Applying a solutions-based approach to improve business processes and helping define procedures. | K15.3 | | | ✓ |
| | Understands how to administer billing, process invoices and purchase orders. | K15.4 | | | ✓ |
| External environment factors | Understands relevant external factors (e.g. <i>market forces, policy & regulatory changes, supply chain etc. and the wider business impact</i>). | K16.1 | ✓ | | |
| | Where necessary understands the international/global market in which the employing organisation is placed. | K16.2 | | ✓ | |
| BEHAVIOURS What is required (Role-model behaviours and positive contribution to culture) | | | | | |
| Professionalism | Behaves in a professional way. <i>This includes: personal presentation, respect, respecting and encouraging diversity to cater for wider audiences, punctuality and attitude to colleagues, customers and key stakeholders.</i> | B17.1 | | ✓ | |
| | Adheres to the organisation's code of conduct for professional use of social media. | B17.2 | | ✓ | |
| | Acts as a role model, contributing to team cohesion and productivity – representing the positive aspects of team culture and respectfully challenging inappropriate prevailing cultures. | B17.3 | | ✓ | |
| Personal qualities | Shows exemplary qualities that are valued including integrity, reliability, self-motivation, being proactive and a positive attitude. | B18.1 | | ✓ | |
| | Motivates others where responsibility is shared. | B18.2 | | ✓ | |
| Managing performance | Takes responsibility for their own work, accepts feedback in a positive way, uses initiative and shows resilience. | B19.1 | | ✓ | |
| | 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. | B19.2 | | ✓ | |
| | Performs thorough self-assessments of their work and complies with the organisation's procedures. | B19.3 | | ✓ | |
| Adaptability | Is able to accept and deal with changing priorities related to both their own work and to the organisation. | B20.1 | | | ✓ |

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| Responsibility | Demonstrates taking responsibility for team performance and quality of projects delivered. | B21.1 | | ✓ | |
| | Takes a clear interest in seeing that projects are successfully completed and customer requests handled appropriately. | B21.2 | | ✓ | |
| | Takes initiative to develop own and others' skills and behaviours. | B21.3 | | ✓ | |

APPENDIX 3 - Copy of Grading Descriptors

| CMI BA Portfolio-based Interview KSB Group | Relevant Pass Grading Descriptor(s): | Relevant Distinction Grading Descriptor(s): |
|---|--|--|
| Knowledge of Their Role and Their Organisation | <p>(K9.1) - The Apprentice shows a working knowledge of the organisation's purpose, aims and ways of working, putting it in context of the local (or sector) environment.</p> <p>(K10.1) - The Apprentice understands the structure of the organisation and how their work contributes.</p> <p>(K10.2) - The Apprentice identifies their role within the team and value of their skills.</p> <p>(K12.2) - The Apprentice consistently follows the laws and regulations relevant to them, their role and their organisation</p> <p>(K13.1) - The Apprentice understands and follows the organisation's internal policies.</p> <p>(K16.2) - The Apprentice understands how external factors affecting their organisation relate to their role.</p> | <p>(K9.1.1) - The Apprentice 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.</p> <p>(K10.1) - The Apprentice understands the structure of the organisation and is able to discuss how different teams support each other, and understands the contribution their work makes and promotes its value.</p> <p>(K10.2) - The Apprentice identifies their role within the team and is able to compare their skills with others.</p> <p>(K12.2) - The Apprentice shows a thorough knowledge of relevant laws and regulations and consistently follows them; and champions adherence to relevant laws and regulation within the organisation".</p> <p>(K13.1) - The Apprentice understands and promotes the organisation's internal policies.</p> <p>(K16.2) - The Apprentice shows a deep understanding of the external factors facing the organisation and how they relate to their role; and seeks additional information about how those factors are developing.</p> |
| Their Interpersonal Skills | <p>(S4.1) - The Apprentice works effectively with a range of people.</p> <p>(S4.2) - The Apprentice influences and challenges peers when necessary.</p> <p>(S4.3) - The Apprentice supports others in the organisation and demonstrates coaching skills.</p> | <p>(S4.1) - The Apprentice influences managers as well as peers.</p> <p>(S4.2) - The Apprentice constructively challenges managers, as well as peers, when necessary.</p> <p>(S4.3) - The Apprentice proactively offers to coach others and has had good performance recorded in feedback.</p> |

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| Their Communication Skills | <p>(S5.1) - The Apprentice demonstrates they can communicate clearly, in both written and verbal communication.</p> <p>(S5.2) - The Apprentice shows flexibility to different situations.</p> <p>(S5.3) - The Apprentice uses appropriate communication channels dependent on the subject matter.</p> <p>(S5.4, S5.5) - The Apprentice demonstrates ability to answer queries effectively from both inside and outside the organisation.</p> | <p>(S5.1, S5.2) - The Apprentice's communication is consistently clear, both written and verbally.</p> <p>(S5.3) - The Apprentice champions an appropriate choice of communication channels.</p> <p>(S5.4, S5.5) - The Apprentice consistently answers queries from both inside and outside of the organisation in a confident way.</p> |
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| Their IT Skills | <p>(S1.1) - The Apprentice demonstrates they can use IT packages, specifically to write letters or emails, and to record and analyse information.</p> <p>(S1.2, S1.3) - The Apprentice is able to perform tasks relevant to their role using IT packages without supervision.</p> | <p>(S1.1) - The Apprentice consistently demonstrates they can use IT packages and can provide varied, quality examples.</p> <p>(S1.2, S1.3) - The Apprentice is able to perform tasks relevant to their role using IT packages and can coach others in using IT.</p> |
| Qualitative Record and Document Production, and Managing Your Own Performance | <p>(S2.1) - The Apprentice's records are accurate, rarely require correction and are treated confidentially.</p> <p>(S2.2, S2.3) - That any recommendations and solutions only need minor improvements.</p> <p>(S2.4, S2.5) - The Apprentice supports others in producing documents and can provide examples.</p> <p>(S6.1) - The Apprentice checks own work before submission and makes improvements.</p> <p>(S6.2) - The Apprentice's work is largely accurate and meets expectations.</p> <p>(S6.3) - The Apprentice identifies areas for improvement and can justify why.</p> <p>(S6.4) - The Apprentice promotes best practice examples of administration, such as accurate records.</p> <p>(B19.1) - The Apprentice clarifies requirements and takes responsibility for work produced.</p> <p>(B19.2) - The Apprentice acts with responsibility and delivers their work to the right level of quality without requiring additional supervision and coaching</p> <p>(B19.3) - The Apprentice asks for feedback and takes feedback on board.</p> | <p>(S2.1) - The Apprentice's records are consistently accurate and confidential</p> <p>(S2.2, S2.3) - That their recommendations are insightful, clearly recorded and results in a clear benefit to the organisation.</p> <p>(S2.4, S2.5) - The Apprentice offers to coach others and good performance is recorded in feedback.</p> <p>(S6.1) - The Apprentice takes ownership for work and applies processes for checking work.</p> <p>(S6.2) -The Apprentice's work is consistently accurate and meets the agreed outcomes.</p> <p>(S6.3) - The Apprentice recommends and implements process improvements.</p> <p>(S6.4, S6.5) - The Apprentice proactively offers to coach others in an area of work and communicates requirements for work.</p> <p>(B19.1, B19.2) - The Apprentice 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>(B19.3) - The Apprentice takes feedback on board and continually assesses the quality of their work.</p> |

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| Approaches To Planning and Organisation | <p>(S7.4, S7.5) - The Apprentice effectively manages resources and meetings</p> <p>(S7.6) - The Apprentice takes responsibility for logistics (such as travel and accommodation) and can provide examples.</p> | <p>(S7.6) - The Apprentice is proactive in taking responsibility for areas of logistics and has excellent examples to demonstrate this.</p> |
| Being A Role Model Business Administrator | <p>(B17.1) - The Apprentice consistently behaves in a professional way, showing punctuality, respect for others and personal presentation.</p> <p>(B17.2, B17.3) - The Apprentice follows the standard of conduct required by the organisation.</p> <p>(B18.1, B18.2) - The Apprentice regularly shows integrity, reliability, positivity and self-motivation.</p> <p>(B21.1) - The Apprentice accepts personal responsibility for their own work, delivering their work on time and to the right level of quality.</p> <p>(B21.2) - The Apprentice demonstrates ownership and willingness to see work completed.</p> <p>(B21.3) - The Apprentice applies initiative in developing their own skills and behaviours.</p> | <p>(B21.3) - The Apprentice applies initiative in developing their own skills and behaviours.</p> <p>(B17.1) - The Apprentice 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>(B17.2, B17.3) - The Apprentice can be relied upon to represent the team and be an ambassador for the organisation.</p> <p>(B18.1, B18.2) - The Apprentice always shows integrity, reliability, positivity and self-motivation and successfully encourages others to show more of these qualities.</p> <p>(B21.1) - The Apprentice is a role model who takes personal responsibility for themselves and peers.</p> <p>(B21.2) - The Apprentice aims to deliver work within targets and deliver more than required in their role.</p> <p>(B21.3) - The Apprentice proactively seeks opportunities to develop themselves and shares this learning with others.</p> |

APPENDIX 4 - CMI Command Verbs

Below is a list of the CMI command verbs that apprentices may find useful and/or want to use to ensure they are fully meeting the relevant assessment criteria of the [L3 Business Administrator](#) occupational standard.

| Command Verb | Definition |
|------------------|--|
| Analyse | Break the subject or complex situation(s) into separate parts and examine each part in detail; identify the main issues and show how the main ideas are related to practice and why they are important. Reference to current research or theory may support the analysis. |
| Assess | Provide a reasoned judgement or rationale of the standard, quality, value or importance of something, informed by relevant facts/rationale. |
| Consider | Take (something) into account (i.e. different ideas, perspectives, theories, evidence) when making a judgement |
| Create | Originate or produce a solution to a problem. |
| Define | Show or state clearly and accurately. |
| Develop | Elaborate, expand or progress an idea from a starting point, building upon given information. |
| Evaluate | Consider the strengths and weaknesses, arguments for and against and/or similarities and differences. The writer should then judge the evidence from the different perspectives and make a valid conclusion or reasoned judgement. Apply current research or theories to support the evaluation when applicable. |
| Examine | Inspect (something) thoroughly in order to determine its nature or condition. |
| Explain | Make something clear to someone by describing or revealing relevant information in more detail. |
| Explore | Go through the topic/issue thoroughly looking at all areas that affect the topic/issue. |
| Formulate | To devise or develop an idea or concept in a concise and systematic way. |
| Identify | Ascertain the origin, nature or definitive characteristics of something. |
| Outline | A general description/broad account/summary of something showing essential features/outline the case briefly but not the detail. |
| Recommend | Put forward proposals, an alternative or suggestion(s) supported by a clear rationale appropriate to the situation/context. |
| Reflect | Consciously contemplate, appraise or give balanced consideration to an action or issue. |
| Review | To examine, survey, reconsider a subject, theory or item. |
| Specify | Identify or state a fact or requirement clearly and precisely in detail. |
| Use | The action of using something for a particular purpose. |

APPENDIX 5 - Version History

| Version | Reason for change | Date amended |
|---------|--------------------------------|--------------|
| 1.0 | Document created. | 08/02/2024 |
| 1.2 | Document reviewed and updated. | 13/08/2024 |
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