

End-Point Assessment Services School Business Professional L4

**Guidance for employers and
training providers**

Academic Year 2022/23

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Introduction

Title: School Business Professional Apprenticeship
Standard: ST0575/AP01
Level: 4

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

BPN is a leading national provider of CPD and assessment, specialising in the education sector. Our programmes include National Profession Qualifications in school leadership and subject specialisms, the Early Career Framework for Early Career Teachers, the National Award for SEN Co-ordination, Early Years Initial Teacher Training, and the Diploma for School Business Managers. We provide apprenticeship training programmes for teaching assistants, early years staff and school leaders and end-point assessment for the School Business Professional Level 4.

Our core values define what we stand for and how we do things, helping us to work together in the most fulfilling way to provide the best service to our clients.



Inspire learning

We aim to change lives for the better by inspiring and developing colleagues working in education. As a team and a network, we inspire each other to grow personally and professionally.



Work together

Across the network, personal relationships and collaboration are at the heart of what we do. We show care and support for our candidates, partners and colleagues, and we go the extra mile to get things done.



Act with integrity

We can be trusted and we do what we say we will. We are open and straightforward, tackling challenges head-on rather than avoiding them. We treat each other with respect and dignity.



Strive for excellence

We have high expectations of ourselves and others. We invest and innovate to deliver the best learning, systems and outcomes. We keep things simple, use evidence and embrace change to achieve our best.

How the apprentice will be assessed

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

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

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

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

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

criteria build on the pass criteria. Best-fit means that at least 50% of the KSBs for either of the two assessment methods, must be assessed as distinction, for a distinction grade to awarded overall for that assessment method.

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

There are no caps to grading.

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

The simulated task

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

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

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

- 1.5 hours to prepare a short-written report which will be presented verbally, 10 minutes for verbal presentation and 10 – 12 minutes for questions; all completed on the same day.
- Apprentices will be given one and a half hours to complete this written task in the form of a report to the governors. BPN will prepare a bank of tasks, each based on the specified areas of the standard. These tasks will mirror the type of reports that apprentices in the school business professional role will be expected to produce for governors. BPN have developed 'task banks' of sufficient size to prevent predictability and will review these, and the tasks they contain, regularly, to ensure they are fit for purpose. Tasks will be allocated to apprentices at random, although the assessor will take into account the setting context.
- Apprentices should produce the report to governors electronically and may refer to online reference materials. The report must be completed under examination conditions with an independent invigilator present. This might be the independent assessor in a dual role of invigilator/assessor. Independent assessors will have 15 minutes to review the report, before the apprentice presents the report orally to the independent assessor, as if the independent assessor were a governor in an educational setting. The presentation must last 10 minutes (+/- 1 minute). The independent assessor will ask clarification questions regarding the report/presentation within a further 10-12 minute time period. The evidence from the

report, presentation and questioning will be assessed holistically, using the grading criteria in Appendix B

- The apprentice will be given a brief detailing the task requirements.
- Apprentices must use a laptop, PC or tablet to complete the assessment which must be submitted electronically. The apprentice, employer or training provider must provide or arrange all the resources used in the assessment.
- The question session and grading of the assessment will take place according to the assessment plan requirements.

The workplace project report, presentation, questions & answers

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

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

BPN will agree workplace project proposals before projects are initiated. Proposals (Appendix C2) can be submitted by email to epa@bestpracticenet.co.uk using the document naming procedure of EPA_SBPL4_Project_Proposal_Form_Apprenticename_Trainingprovider.

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

- Apprentices must prepare a report and presentation during the EPA period on their workplace project that links to at least two knowledge areas of the standard; Finance, Procurement, Human Resources, Managing Support Services, Marketing and Infrastructure.
- The workplace project report must be started, completed and submitted to BPN no later than 10 working days after BPN has confirmed the apprentice is 'EPA Ready.'
- The workplace project report must be submitted on the workplace project report template (Appendix C3)
- The workplace project report must be accompanied by a submission form (Appendix C4), provided by BPN confirming the authenticity of the report and supporting materials. This is a requirement of submission.

- The BPN independent assessor will assess the workplace project report prior to preparing questions for the initial WPPR Q & A session
- The BPN independent assessor will review the portfolio of learning prior to the Q & A session based on the other knowledge areas. However, the portfolio of learning will **not** be assessed.
- The apprentice must give a presentation lasting between 10 - 12 minutes based on their workplace project. This is followed by 10 minutes of questions from the BPN independent assessor relating to the project report and the presentation. This questioning session is followed by questions on other areas of the standard not covered by workplace project and presentation. This questioning session will last between 20 – 22 minutes with an expectation of approximately 5 minutes per knowledge area of the standard.
- Questions will be determined by the BPN independent assessor and will be dependent on the evidence presented during the presentation and the project report. Questions may also relate to documents within the portfolio of learning.
- A range of questions will be used that are either:
 - Based on the portfolio of learning
 - Related to personal work or training experience.
 - Focused on knowledge related to assessment criteria.

The balance of questions may vary and are selected by the assessor in the best interests of providing opportunities for all pass criteria to be covered and as many distinction criteria as possible, bearing in mind that all pass criteria must be met in order to avoid a fail.

- The evidence from the project report, presentation and questioning will be assessed holistically, using the grading criteria for the SBP standard, as shown in appendix B and the Assessment Plan.

The Portfolio of Learning

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

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

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

Training Providers are responsible for ensuring the portfolio of learning is uploaded to the ACE360 system as part of the Gateway Approved check.

When the apprentice will be assessed

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

This occurs once the employer is satisfied that:

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

Through ACE360, the Training Provider is responsible for notifying BPN that the apprentice is 'Gateway Approved'. Before stating 'Gateway Approved' Training Providers must ensure that all Gateway Components are in place for BPN to view. This must include the submission of a signed Gateway Agreement form (Appendix F) that must be submitted to the 'Employer Gateway Agreement' area shown below. It must also include the submission of Appendix G – Confirmation of workplace project requirements to the box labelled 'Undertakes research'

Gateway Components

[Download all evidence for latest attempt](#) ↓

Apprentices must ... ✓ English First attempt	Apprentices must ... ✓ Maths First attempt
Creation of a portf... ✓ Portfolio / Log Book First attempt	Undertakes resear... ✓ Project First attempt
Evidence of 360° f... ✓ Employer ref / Peer ... First attempt	Employer Gateway Agreement

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

Assessments will typically be scheduled within weeks 5-7 of this 8-week window, allowing a week at the end to rearrange assessments in the case of postponements due to unforeseen circumstances.

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

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

Where the apprentice will be assessed

Assessments will take place online using Microsoft Teams, or an agreed suitable alternative platform if required. For all assessments, a systems check is carried out between the assessor and apprentice shortly before the day of the assessment. During the systems check, the assessor will test the usability of the platform. The assessor will also explain some of the logistics of the EPA process.

How BPN ensure high-quality independent assessors

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

- receive ongoing assessment and standardisation training from the BPN programme manager and Lead Assessors
- be independent of the employer, the apprentice and the training provider
- be internally quality assured by BPN
- be externally quality assured by the Institute of Apprenticeships QA Agent

How BPN ensure the quality of the resources used for EPA

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

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

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

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

How apprentices are supported for end-point assessment

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

BPN will provide training providers of registered apprentices with the following resources and support:

General

- A 'word' version of all appendices within this guidance document.
- Access to our office-based EPA assessment team to answer any additional questions.
- Access to our special circumstances and disability co-ordinator to ensure any required special arrangements are considered, agreed and implemented.
- Access to our office-based ICT team and to the ACE360 support desk
- Regular online opportunities to discuss the Standard with a lead assessor
- Opportunities to check-in on individual apprentice progress mid-programme

Workplace Project

- Guidance on the workplace project and workplace project report (Appendix C1)
- Additional guidance on how to approach the workplace project report
- A bank of workplace project synopses to illustrate a range of viable approaches
- Examples of project proposal forms including a selection with EPAO feedback
- A template project proposal form (Appendix C2)
- A template for the project report (Appendix C3)
- A workplace project submission form (Appendix C4)

Portfolio of learning

- A Portfolio of Learning guidance document (Appendix D1)
- A document cover sheet template to support the apprentice's explanation of how the document provides evidence of any KSB claimed (Appendix D2)
- A document tracker form that apprentices use to track coverage of the KSBs against the documents selected (Appendix D3)
- Support document examples

Simulated Task

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

Confirmation required before a BPN assessment can be arranged

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

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

The timelines for engagement with BPN as the EPAO

The standard timeline is:

- Employer selects BPN as the EPAO.
- BPN contracts with the training provider through a Service Level Agreement (SLA). This forms a general contract between the two parties
- Apprentices are registered and set-up with BPN through ACE360
- BPN invoices for and receives, payment of the initial registration fee after 12 weeks on programme.
- Training Provider, Employer or Apprentice, submits a workplace project proposal form to BPN who return the proposal form with feedback within ten working days.
- Mid-programme opportunity for apprentice/employer/TP to check -in with a lead or senior assessor to discuss the end-point assessment requirements.
- Through ACE360, the Training provider changes the status of the apprentice to 'Gateway Approved' and verifies to BPN that all requirements of the Gateway assessment have been met (through submitting appendix F and ensuring all relevant Gateway Components are in place and able to be viewed by BPN).
- BPN check documentation and when all present and correct, set to 'EPA Ready'
- Apprentice must begin and complete their workplace project report within 2 weeks of being set as EPA Ready.

- Training provider or employer must verify that both the project and the project report are the apprentice's own work. They must also confirm that the project report was started and completed post-gateway (Appendix C4).
- BPN invoices for and receives, payment of the balance of the assessment fee.
- The allocated assessor will provide appropriate notice and confirmation of the EPA test day within 10 days after completed submission of the project report.
- EPA test day takes place typically within 8 weeks of the Gateway assessment, usually within weeks 5-7 of the window.
- Our assessor will grade the assessment activity as fail, pass or distinction. To achieve a pass, apprentices must achieve at least a pass in both assessment methods.
- The outcomes of end-point assessment are communicated to the apprentice / employer / training provider in line with internal and external quality assurance processes, within 6 weeks of assessment. Feedback forms are provided through the shared area on ACE360 and by email to the nominated Training Provider contact

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

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

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

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

Note on accessibility

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

BPN fees for end-point assessment

Our fee for end-point assessment is £900 per apprentice.

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

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

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

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

BPN End Point Assessment Policies

Our End Point Assessment policies are available on our website at www.bestpracticenet.co.uk/end-point-assessment

These include policies on:

Conflict of Interest

Reasonable Adjustments

Fair Access and Special Considerations

Maladministration and Malpractice

Appeals

Complaints

Next steps

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

Appendix A – Knowledge, skills and behaviours

Knowledge	What is required for occupational competence	Assessment Method
Finance	Understands the range of educational funding streams available which are applicable to their educational setting. Has a working knowledge of accounting practices and understands how to apply business principles to the optimum use of funding to support learning outcomes. Understands school compliance issues. Recognises business efficiency and knows the range of data required to inform school business decisions.	Project report & presentation, with questions and answers
Procurement	Knowledge of school procurement regulations and requirements and how to achieve value for money, including collaborative procurement. Understands how to manage collaborative processes with other schools in order to share good practice and secure financial efficiencies. Has an awareness of the complexities of procurement law.	Project report & presentation, with questions and answers
Human Resources	Understands the complexities of teaching and support staff contracts, terms & conditions of employment and payroll. Understands educational HR policies, safer recruitment, and compliance with safeguarding priorities and equality legislation. Has an awareness of when and where to seek legal advice.	Project report & presentation, with questions and answers
Managing Support Services	Knows the impact of educational policies at an operational level in order to support the school development plan. Understands the influence of educational regulatory bodies (DfE, Ofsted, etc). Is aware of Ofsted requirements and the implications these have for the workforce and planning in a school. Knows how to manage the DfE pupil and workforce census and their impact on the school.	Project report & presentation, with questions and answers
Governance and Risk	Has practical knowledge of the supporting documentation governors need in order to carry out their role effectively. Understands the process of risk management and procures and manages insurance cover for the school to mitigate risks as appropriate. Has appropriate knowledge enabling compliance with charitable status and education law. Understands the impact of, and how to implement, safeguarding policy in a school environment.	Simulated task
Marketing	Understands how marketing can be used to underpin school funding. Knows the marketing priorities of their school and the impact marketing activities can have. Understands marketing activities to promote their school and takes into account e-safety when doing so.	Project report & presentation, with questions and answers
Infrastructure	Awareness of the optimum deployment of resources targeted to raise pupil attainment. Understands the significance of physical facilities and digital processes in an educational setting, e.g. facilities repair logs, student data analysis, data security and safe use of social media. Has knowledge of	Project report & presentation, with questions and answers

	relevant legislation that schools must comply with, such as Health & Safety, Freedom of Information, Employment and Data Protection policies.	
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Skills	What is required for occupational competence	Assessment Method
Financial and Operational Management	<p>Manages strategies set by senior personnel and drafts budgets that reflect them.</p> <p>Manages the accurate recording and reporting of the school's finances in order to inform the senior leadership team who set the priorities for school spending.</p> <p>Completes pre-audit checks.</p> <p>Produces reports that present information and data, using a range of interpretation and analytical processes.</p>	Project report & presentation, with questions and answers
Project Management	<p>Plans, organises and manages processes either in-house or outsourced to ensure value for money for the school whilst supporting education delivery, e.g. contract management, payroll, building maintenance and small development projects. Uses multiple IT packages and specialised schools MIS (management information systems) platforms. Prepares and collates data for reporting purposes.</p>	Project report & presentation, with questions and answers
Change Management	<p>Embraces change in a school and influence others in a positive manner. Works constructively within a team environment.</p>	Project report & presentation, with questions and answers
Communication and Relationship Building	<p>Communicates appropriately and effectively with a range of stakeholders including students, parents, governors/trustees, staff, government and local government departments, e.g. DfE/ ESFA, to gain positive outcomes. Has the confidence to question or seek clarification of aspects of school practice when unsure or unclear.</p>	Simulated task
Strategic Management	<p>Manages support services across an entire school whilst also providing guidance to colleagues on the most appropriate use of school funding. Effectively line manages small teams to drive efficiencies.</p>	Project report & presentation, with questions and answers

Behaviours	What is required for occupational competence	Assessment Method
Change Catalyst	Keeps up to date with educational policy developments and embraces change. Self-motivated and supportive of others in working through change.	Project report & presentation, with questions and answers
Decision Maker	Demonstrates a confident approach to decision-making and prioritisation, thus gaining the confidence of others.	Simulated task
Skilled Negotiator	Open, approachable and is able to build trust with others. Consults and seeks the views of others and values diversity both within and outside the school.	Project report & presentation, with questions and answers Simulated task
Collaborative	Behaves in a collaborative way with other internal and external stakeholders. Promotes a team spirit and actively demonstrates professional competence in all settings and situations.	Project report & presentation, with questions and answers
Resilient	Has the ability to adapt to different, changing and challenging situations whilst promoting the highest professional standards.	Project report & presentation, with questions and answers
Challenger	Is willing to ask difficult questions whilst demonstrating an ethical, fair and consistent approach. Offers a business prospective and supports discussion and debate with professional knowledge and evidence.	Project report & presentation, with questions and answers

Appendix B Grading criteria and bands

1. Simulated Task

Knowledge & Skills	What is required	Fail	Pass (apprentice demonstrates all of the following criteria)	Distinction (in addition to pass criteria, apprentice demonstrates all of the following criteria)
	The Apprentice will:		The Apprentice can:	Pass criteria plus:
Governance & Risk: Knowledge	<p>Have practical knowledge of the supporting documentation governors need in order to carry out their role effectively.</p> <p>Understand the process of risk management and procures and manages insurance cover for the school to mitigate risks as appropriate.</p> <p>Understand the impact of, and how to implement, safeguarding policy in a school environment.</p>	No evidence or partial evidence.	<p>Present the benefits of innovation to a governing body.</p> <p>Evaluate a range of innovation opportunities within a school.</p> <p>Identify barriers to change that can exist in a school and how they can be overcome including how they comply to charitable status and education law.</p>	<p>At least two types of relevant source information have been used.</p> <p>The key concepts and techniques related to the management of risk in schools are identified.</p>
Communication and Relationship Building: Skills	<p>Communicates appropriately and effectively with a range of stakeholders including students, parents, governors/trustees, staff, government and local government departments e.g. DfE/ESFA to gain positive outcomes.</p> <p>Has the confidence to question or seek clarification of aspects of school practice when unsure or unclear.</p>	No evidence or partial evidence.	<p>Demonstrate clarity of thinking</p> <p>The communication is appropriate for familiar and unfamiliar audiences and appropriate media have been used</p>	Communicates a deep knowledge and understanding of concepts and techniques related to Governance and Risk.
Decision Maker: Behaviour	Apply a confident approach to decision-making and prioritisation, thus gaining the confidence of others.	No evidence or partial evidence	Demonstrates a confident approach to decision-making and prioritisation thus gaining the confidence of others.	<p>Evidence that they have promoted the importance of using financial information in effective decision making.</p> <p>Compare different specifications for a proposed product/service and make a recommendation for purchase.</p>

2. Project Report & Presentation with Questions & Answers

Knowledge & Skills	What is required The Apprentice will:	Fail	Pass (apprentice demonstrates all of the following criteria) The Apprentice can:	Distinction (in addition to pass criteria, apprentice demonstrates all of the following criteria) Pass criteria plus:
Procurement: Knowledge	Know how to achieve value for money, including collaborative procurement. Understand how to manage collaborative processes with other schools in order to share good practice and secure financial efficiencies.	No evidence or partial evidence.	Explain the concepts of economies of scale through group purchasing. Compare the different potential purchasing routes for schools. Describe the benefits of using national and local benchmarking data in schools.	Must include the three principles of fair competition, transparency and probity when spending public monies and reference appropriate definitions. Must compare at least two different models for joint working arrangements in a school.
Marketing: Knowledge	Understand how marketing can be used to underpin school funding. Know the marketing priorities of their school and the impact marketing activities can have.	No evidence or partial evidence.	Define a school's stakeholder groups. Evaluate marketing activities undertaken by the school. Explain the importance of reputational management strategy. Describe key health & safety regulations that must be adhered to when managing a school's public events. Identify income generation opportunities applicable to a school. Evaluate potential risks associated with income generation activities in a school.	Must demonstrate how they have advised and influenced their schools marketing and communication plan. Must include a descriptive overview of UK marketing legislation and how this applies to schools.
Project Management: Skills	Plan, organise and manage processes either in-house or outsourced to ensure value for money for the school whilst supporting education delivery e.g. contract management, payroll, building maintenance and small development projects. Uses multiple IT packages and specialised schools MIS (Management Information Systems) platforms. Prepares and collates data for reporting purposes.	No evidence or partial evidence.	Show how they use IT packages to provide financial and performance data to support the procurement or marketing processes. Show how they critically analysed a school's performance in purchasing or marketing compared to other schools and collate it into a format for reporting purposes.	Must assess the importance of achieving value for money. Must assess the process used by the school with at least two efficiency opportunities highlighted.
Finance: Knowledge	Understand the range of educational funding streams available which are applicable to their educational setting. Understand school compliance issues.	No evidence or partial evidence.	Describe national school budget procedures. Explain the current education funding streams for schools and where the latest funding information can be found.	Must identify the key information which can affect financial decisions in a school. Must describe at least two key comparisons that could be used to compare budget forecast to

	Recognise business efficiency and knows the range of data required to inform school business decisions.		Describe the main and regular financial decisions that are made in schools. Explain how costing information is used when making financial decisions. Explain the importance of considering different views when making decisions about service delivery. Describe how the budget planning cycle links to the school's development plan. Explain school specific financial policies that must be adhered to, including those in place to ensure probity. Explain how to administer finance operations in accordance with school financial procedures. Evaluate key concepts relating to financial systems and controls, and how they are implemented in a school.	actual and describe at least two corrective actions that could be taken. Must include at least three sources of financial and performance data that can be used to support performance monitoring in schools and include an explanation of the relevance of the data.
Financial and Operational Management: Skills	Manages strategies set by senior personnel and drafts budgets that reflect them. Manages the accurate recording and reporting of the school's finances in order to inform the senior leadership team who set the priorities for school spending. Completes pre-audit checks. Produces reports that present information and data, using a range of interpretation and analytical processes.	No evidence or partial evidence.	Assess the information used to make financial decisions and how it's used to make decisions in a school. Co-ordinate the planning and preparation of a budget. Provide financial and performance data to support performance monitoring against financial objectives. Assess risks to a school's financial plans, identifying how these risks can be mitigated. Uses appropriate accounting methods to report financial information.	Must provide at least two types of financial or performance data in a format that can be used to support performance monitoring. Must include an explanation of how to ensure probity.
Human Resources: Knowledge	Understand the complexities of teaching and support staff contracts, terms & conditions of employment and payroll. Understand educational HR policies, safer recruitment and compliance with safeguarding priorities and equality legislation. Understand when and where to seek advice.	No evidence or partial evidence.	Assess the impact that relevant and current employment and discrimination law has on HR activities in a school. Describe how a school can minimise employment and discrimination related risks. Describe the key components of relevant employment law and policy relating to staff recruitment and exit. Describe the process of workforce planning in a school including key considerations Explain the importance of safeguarding processes in school recruitment.	Must use at least two sources of staff benchmark data to identify potential improvements and gaps. Must assess at least three recruitment options which must lead to a judgement on their suitability to a school's identified recruitment demand. Must analyse at least two continuous professional development opportunities that exist within a school.

Managing Support Services: Knowledge	<p>Understand the impact of educational policies at an operation level.</p> <p>Understand the influence of educational regulatory bodies (DfE, Ofsted etc). Be aware of Ofsted requirements and the implications these have for the workforce and planning in school.</p> <p>Know how to manage the DfE pupil and workforce census and their impact on the school.</p>	No evidence or partial evidence.	<p>Identify different sources of statutory and legislative requirements that impact school management, and how to access relevant information. Assess the potential impact of policy and legislative changes on schools.</p> <p>Review performance data to identify inconsistencies between functions/departments.</p> <p>Explain the data available to monitor and review in order to ensure operational effectiveness across all departments.</p> <p>Produce plans to address under performance identified across functions/departments.</p>	<p>Must identify at least three different sources of statutory and legislative requirements that impact school management.</p> <p>Must assess the potential impact of at least two policies and one legislative change on schools where the assessment must be objective and not just reflect the learner opinion.</p>
Infrastructure: Knowledge	<p>Understand the significance of physical facilities and digital processes in an educational setting.</p> <p>Be aware of the optimum deployment of resources targeted to raise pupil attainment.</p> <p>Know the relevant legislation that schools must comply with, e.g. Health & Safety, Freedom of Information, Employment & Data protection policies etc.</p>	No evidence or partial evidence.	<p>Describe the key purposes of asset management in a school. Describe how to plan a range of asset management activities for the short, medium and long term.</p> <p>Describe the legislative and regulatory factors influencing the use of space in schools.</p> <p>Assess the school's long term capital plans and requirements</p> <p>Review the school's long term space requirements and how these will be met by current plans for school space.</p> <p>Produce a cost benefit analysis to identify facilities that meet service needs and provide value for money.</p>	<p>Must show they understand the term asset management when used in a school context and must include at least two key purposes.</p> <p>Must describe at least two legislative and regulatory factors influencing the use of space in schools.</p> <p>Must be an assessment of the extent to which the school procurement strategy for spending on capital supports teaching and learning activities.</p>
Strategic Management: Skills	<p>Manage support services within an entire school.</p> <p>Provide guidance to colleagues on the most appropriate use of school funding.</p> <p>Effectively manage small teams to drive efficiencies.</p>	No evidence or partial evidence.	<p>Show their awareness of the effect different leadership styles has on individuals, teams and schools.</p> <p>Show how they have identified barrier to prevent a team working effectively and how they have overcome these.</p> <p>Show how they have led a team to achieve their own and others' objectives.</p> <p>Show the information they have provided to make financial decisions within their school.</p>	<p>Must describe how training and development improves performance of both self and team.</p> <p>Must show how they have supervised a team and achieved specific objectives.</p>

Behaviours	Fail	Pass The Apprentice:	Distinction (in addition to pass criteria)
Change Catalyst	No evidence.	<p>Keeps up to date with educational policy development.</p> <p>Embraces change.</p> <p>Works constructively within a team environment.</p>	<p>Evidence of supporting the development of a team.</p> <p>Must identify at least two barriers to change that can exist in a school and show how each of them could be overcome.</p>

		Is self-motivated and supportive of others in working through change.	
Skilled Negotiator	No evidence.	Consults and seeks the views of others Values diversity both within and outside the school.	Evidences that they have assessed communication needs for both team and self and implemented changes. Must show how they have raised awareness of professional development within a school.
Collaborative	No evidence.	Behaves in a collaborative way with other internal and external stakeholders. Promotes a team spirit. Actively demonstrates professional competence in all settings and situations.	Must provide evidence of incorporating at least two examples of other peoples' ideas into decision making. Evidence their support of the development of a team.
Challenger	No evidence.	Is willing to ask difficult questions whilst demonstrating an ethical, fair and consistent approach. Offers a business perspective and supports discussion and debate with professional knowledge and evidence.	Show how they have produced a plan to address inconsistencies across departments. Identify areas where financial controls may be inadequate and evidence that they have made recommendations to rectify these problems.
Resilient	No evidence.	Has the ability to adapt to different, changing and challenging situations whilst promoting the highest professional standards.	Seek feedback and review of own performance to inform development outside of formal performance reviews. Critically assess personal development needs and prepare a personal development plan in sufficient detail to show it can be implemented in a school environment.

Level 4 SBP Final Grade Bands – Examples

Written report (Simulated Task)	Workplace report, presentation and questions	Final grade
DISTINCTION	DISTINCTION	DISTINCTION
PASS	DISTINCTION	DISTINCTION
DISTINCTION	PASS	PASS
PASS	PASS	PASS
PASS	FAIL	FAIL
FAIL	PASS	FAIL

Appendix C1 - Guidance on the workplace project and report

Our expectation is that training providers will support apprentices to understand and follow the guidance set out below on the nature and structure of the workplace project.

Our approach to the assessment plan

The SBP L4 assessment plan, published by the Institute for Apprenticeships is clear that:	BPN will:
The workplace project should be part of the apprentice's normal work duties and as such will be agreed between the apprentice and their employer. As the contents of this are also assessed during the EPA, the workplace project must also be agreed with the EPAO.	<ul style="list-style-type: none"> • Provide sample synopses and a sample completed project proposal form. • Provide a project proposal form that must be submitted to BPN.
Completion of the workplace project will be based on two of the following areas of the standard; Finance, Procurement, Human Resources, Managing Support Services, Marketing and Infrastructure.	<ul style="list-style-type: none"> • Provide a project proposal form that requires apprentices to identify which two areas the project will be based on. Other areas may also be covered within the workplace project, but it is not a requirement that they are.
It is anticipated that the workplace project will be based on one significant piece of work completed in the workplace, however, the project may consist of a number of smaller pieces of work allowing for situations where the work environment may not present the opportunity for one large piece of work that covers a minimum of two areas of the standard.	<ul style="list-style-type: none"> • Require apprentices to state the approach being taken as part of the project proposal. Where more than one significant piece of work is the chosen method, apprentices will need to be clear regarding which projects are intended to address which areas.
The workplace project report should contain an executive summary, methodology, review of findings and next steps.	<ul style="list-style-type: none"> • Provide a template to all apprentices on which the project report will need to be typed, in line with the sample project report made available to view before Gateway assessment.

<p>The report may include evidence from their project, graphs, tables and photographs but should not exceed 2,000 words (+/-10%). This word count does not include any appendices but the total appendices should not exceed the total word count for the report. The report should be completed in Arial 11</p>	<ul style="list-style-type: none"> • Check compliance upon submission and refer back to the training provider if compliance is not met.
<p>When designated as 'EPA Ready' apprentices will be given two weeks to start and complete a formal written report on their workplace project(s) which cover two areas of the Standard. The project should be suitably anonymised ensuring that all sensitive school-based information is removed.</p>	<ul style="list-style-type: none"> • Require training providers to provide an explanation of extenuation circumstances if the deadline is not met or not likely to be met. • Require confirmation that the project report was started and completed post-Gateway. • Return as incomplete, any submission that is not suitable anonymised with sensitive school-based information removed.
<p>The portfolio of learning will underpin the EPA project report, presentation and Q&A completed during the EPA period. Evidence must be holistically mapped against the KSBs with clear explanations of how the evidence covers each KSB. It must contain typically 10-12 discrete pieces of evidence.</p>	<ul style="list-style-type: none"> • Anticipate that the documents contained within the portfolio of learning may be directly or indirectly linked to the work-based project, however, it is not a requirement that they are. This enables the apprentice to demonstrate all KSBs across the range of documents and not just the KSBs covered in the workplace project

Additional guidance

The apprentice must give a presentation lasting between 10 -12 minutes **based on their workplace project**. This is followed by 10 minutes of questions from the independent assessor relating to the project report and the presentation.

This questioning session is followed by questions on other areas of the standard not covered by workplace project and presentation. This questioning session should last between 20 – 22 minutes with an expectation of 5 minutes per area of the standard.

Questions will be determined by the BPN independent assessor and will be dependent on the evidence presented during the presentation and the project report. Questions may also relate to documents within the portfolio of learning.

A range of questions will be used that are either:

- Based on the portfolio of learning
- Related to personal work or training experience.
- Focused on knowledge related to assessment criteria.

The balance of questions may vary and are selected by the assessor in the best interests of providing opportunities for all pass criteria to be covered and as many distinction criteria as possible, bearing in mind that all pass criteria must be met in order to avoid a fail.

The choice of project is very important as it must provide opportunity to cover at least two of the core standard areas and a good range of skills and behaviours. BPN provide synopses of suitable project titles. The project proposal must be agreed by the employer, training provider and EPAO. Relevant templates are available on ACE360 and within the SBP L4 EPAO Guidance for apprentices, employers and training provider's document. An example of a completed project proposal is provided to contracted training providers. Before considering a project, it is important to read the project proposal form (Appendix C2).

BPN anticipate the project is likely to take place within the last 6 months of the on-training period do not stipulate, however, we do not stipulate when a project must start or for how long the project must last. Nor is it a requirement that all elements of the project have been completed or have been completed successfully. There may have been barriers to completion or successful completion that are beyond the control of the apprentice. The core purpose of the work-place project is to enable the apprentice to demonstrate the knowledge, skills and behaviours. This is what the independent assessor will assess and not the outcomes of the project.

Appendix C2 - Workplace project proposal form

Please complete and submit as a word document, rather than a PDF

Apprentice name:	
Employer name:	
Training Provider name:	
Date:	
EPAO Feedback (Please leave blank. The EPAO will provide written feedback on your proposal within this section.)	Date:

It is anticipated that the workplace project will be based on one significant piece of work completed in the workplace, however, the project may consist of a number of smaller pieces of work allowing for situations where the work environment may not present the opportunity for one large piece of work that covers a minimum of two areas of the standard. If you decide to undertake more than one project you will need to complete a separate workplace project proposal form for each project.

Title of your project:
Aim(s) of the project – what are you trying to achieve?
Methodology– how will you achieve it? Set out the steps you will take to achieve the aims.

<p>Scope and timeline – How long will it last? Who will be involved? What stakeholders will you need to consider or liaise with?</p>
<p>What do you consider to be the benefits (rewards) of the project, both operational and strategic – be specific about the improvements this project is intended to achieve:</p> <p>Operational –</p> <p>Strategic –</p>
<p>Risks – all projects carry risk as well as potential rewards – please identify the major ones below:</p> <p>Risks –</p>
<p>State the two knowledge areas that your project will focus on:</p>

Additional information on knowledge areas

Your workplace project **report** and your **presentation** during the EPA period **must** focus on **two** of the knowledge areas shown below, for example Procurement and Marketing. Therefore, your workplace **project** must cover **at least** two of the knowledge areas listed below in order for you to fulfil this requirement. As part of your project proposal, please select **two** knowledge areas below and indicate **Yes** for each row, where **Yes** confirms that you have discussed with your employer and/or training provider and you are confident that the choice of workplace project will **provide opportunities** for the **requirements for occupational competence** to be covered and demonstrated through the completion of

your workplace project and presentation. It is not mandatory that *each requirement for occupational competence* is marked as 'Yes', for example you might select **Yes** for KFN1, KFN2 and KFN3, but not KNF4. However, clearly the more competencies you cover, the stronger your assessment will be.

Knowledge area		What is required for occupational competence	Yes
Finance	KFN1	Understands the range of educational funding streams available which are applicable to their educational setting.	
	KFN2	Has a working knowledge of accounting practices and understands how to apply business principles to the optimum use of funding to support learning outcomes.	
	KFN3	Understands school compliance issues.	
	KFN4	Recognises business efficiency and knows the range of data required to inform school business decisions.	
Procurement	KPR1	Knowledge of school procurement regulations and requirements and how to achieve value for money, including collaborative procurement.	
	KPR2	Understands how to manage collaborative processes with other schools in order to share good practice and secure financial efficiencies.	
	KPR3	Has an awareness of the complexities of procurement law.	
Human Resources	KHR1	Understands the complexities of teaching and support staff contracts, terms & conditions of employment and payroll.	
	KHR2	Understands educational HR policies, safer recruitment, and compliance with safeguarding priorities and equality legislation.	
	KHR3	Has an awareness of when and where to seek legal advice.	
Managing Support Services	KMS1	Knows the impact of educational policies at an operational level in order to support the school development plan.	
	KMS2	Understands the influence of educational regulatory bodies (DfE, Ofsted, etc).	
	KMS3	Is aware of Ofsted requirements and the implications these have for the workforce and planning in a school.	
	KMS4	Knows how to manage the DfE pupil and workforce census and their impact on the school.	
Governance and Risk	KGR1	Has practical knowledge of the supporting documentation governors need in order to carry out their role effectively.	
	KGR2	Understands the process of risk management and procures and manages insurance cover for the school to mitigate risks as appropriate.	
	KGR3	Has appropriate knowledge enabling compliance with charitable status and education law.	

	KGR4	Understands the impact of, and how to implement, safeguarding policy in a school environment.	
Marketing	KMK1	Understands how marketing can be used to underpin school funding.	
	KMK2	Knows the marketing priorities of their school and the impact marketing activities can have.	
	KMK3	Understands marketing activities to promote their school and takes into account e-safety when doing so.	
Infrastructure	KIN1	Awareness of the optimum deployment of resources targeted to raise pupil attainment.	
	KIN2	Understands the significance of physical facilities and digital processes in an educational setting, e.g. facilities repair logs, student data analysis, data security and safe use of social media.	
	KIN3	Has knowledge of relevant legislation that schools must comply with, such as Health & Safety, Freedom of Information, Employment and Data Protection policies.	

Your project must provide **opportunities** for you to evidence **a range of skills and behaviours** as set out in Annex 1 of the assessment plan. It is not expected that all skills and behaviours will be evident through the project alone. The question and answer session and the simulated task at end-point assessment will provide additional and alternative opportunities to evidence these skills and behaviours, as will your portfolio of evidence. We have noted below, the skills and behaviours that are assessed through the simulated task. This does not mean that they cannot also be assessed through the project and project report. Clearly the more skills and behaviours covered by the project and the greater the depth covered, the stronger the project becomes. As part of this project proposal, please indicate **Yes** for each row, where **Yes** confirms that you have discussed with your employer and/or training provider and you are confident that the choice of workplace project **is likely to provide opportunities** for the **requirements for occupational competence** to be covered and demonstrated through the completion of your workplace project and presentation.

Skills	What is required for occupational competence	Yes
SFM1	Manages strategies set by senior personnel and drafts budgets that reflect them.	

Financial and Operational Management	SFM2	Manages the accurate recording and reporting of the school's finances in order to inform the senior leadership team who set the priorities for school spending.	
	SFM3	Completes pre-audit checks.	
	SFM4	Produces reports that present information and data, using a range of interpretation and analytical processes.	
Project Management	SPM1	Plans, organises and manages processes either in-house or outsourced to ensure value for money for the school whilst supporting education delivery, e.g. contract management, payroll, building maintenance and small development projects.	
	SPM2	Uses multiple IT packages and specialised schools MIS (management information systems) platforms.	
	SPM3	Prepares and collates data for reporting purposes.	
Change Management	SCM1	Embraces change in a school and influence others in a positive manner.	
	SCM2	Works constructively within a team environment.	
Communication and Relationship Building IMPORTANT: Assessed through simulated task	SRB1	Communicates appropriately and effectively with a range of stakeholders including students, parents, governors/trustees, staff, government and local government departments, e.g. DfE/ ESFA, to gain positive outcomes.	
	SRB2	Has the confidence to question or seek clarification of aspects of school practice when unsure or unclear.	
Strategic Management	SSM1	Manages support services across an entire school.	
	SSM2	Provides guidance to colleagues on the most appropriate use of school funding.	
	SSM3	Effectively line manages small teams to drive efficiencies.	

Behaviours		What is required for occupational competence	Yes
Change Catalyst	BCC1	Keeps up to date with educational policy developments.	
	BCC2	Embraces change.	
	BCC3	Self-motivated and supportive of others in working through change.	
Decision Maker IMPORTANT:	BDM1	Demonstrates a confident approach to decision-making and prioritisation, thus gaining the confidence of others.	

Assessed through simulated task			
Skilled Negotiator <i>(also assessed through simulated task)</i>	BSN1	Open, approachable and is able to build trust with others.	
	BSN2	Consults and seeks the views of others.	
	BSN3	Values diversity both within and outside the school.	
Collaborative	BCB1	Behaves in a collaborative way with other internal and external stakeholders.	
	BCB2	Promotes a team spirit.	
	BCB3	Actively demonstrates professional competence in all settings and situations.	
Resilient	BRS1	Has the ability to adapt to different, changing and challenging situations whilst promoting the highest professional standards.	
Challenger	BCH1	Is willing to ask difficult questions whilst demonstrating an ethical, fair and consistent approach.	
	BCH2	Offers a business perspective and supports discussion and debate with professional knowledge and evidence.	

Appendix C3 - Workplace project report template

Leading a school-based project to demonstrate selected assessment criteria linked to knowledge, skills and behaviours for the School Business Professional L4 Apprenticeship Standard.

This report **must** be started and completed **after** you have been approved as EPA Ready as part of the gateway approval process. You must **not** start completing this form before you are instructed to do so by Best Practice Network, your employer or your training provider.

Project title:	
State the two main knowledge areas that your project has focussed on:	

Apprentice name	
Name of employer	
School Context	
Training Provider name, email address and contact number	
Name and roles of leaders, teams and individuals worked with during the project	
Links to most relevant research undertaken to support the project	
Word Count - This should not exceed 2,000 words (+/-10%). The word count does not include appendices, but the total appendices should not exceed the total word count for the report.	

Use the phase boxes below to provide an account of your project.

This is a written account of the project that aims to evidence the assessment criteria indicated in the Assessment Plan for this Standard. Whilst on programme you will have correctly focused on KSBs and hence your workplace project *proposal* asked you to identify which KSBs you felt would or could be covered through the project. Now you are post-Gateway and at gateway assessment stage, it is important to understand that the assessor will be assessing the KSBs through the specified assessment criteria for pass and distinction. Before starting this project report, you should make sure you have seen the support document 'SBP L4 WP Report Self-evaluation checklist'. Whilst writing the report you should refer to the support document 'BPN

SBP Level 4 Assessment Criteria coding linked to KSBs' which details the coding required that you should enter in the left-hand column of the report below.

Your project MUST focus on two main areas selected as part of your project proposal. You may include reference to other areas if they are relevant. It is not expected that all assessment criteria will be covered through the project

Remember, the purpose of the project report is to describe in writing, how you believe you have demonstrated the assessment criteria. The focus is not describing the project and then reflecting back on what assessment criteria you might have covered. The focus is on explaining how the selected assessment criteria were demonstrated through the project. Therefore, write very clearly with the assessment criteria in mind as you note these in the left-hand column. Any assessment criteria can be referenced more than once i.e. if you write a sentence or paragraph in one row, you can reference it again in a later row if you feel you have covered it again.

Before completing this form, refer to the support document *SBP L4 Example of referencing report against criteria*. This form (C3) must be submitted alongside Appendix C4 - Workplace project report submission form

AC	Executive Summary - Provide a brief overview of the project, the aims and outcomes
AC	Methodology of delivery – Design Explain how you designed and planned the project, what knowledge or learning did you draw upon
(e.g. FnP1, HrP2)	
AC	Methodology of delivery – Implementation Explain what you did, what happened, how and why. Explain any project management tools and techniques you deployed
AC	Evaluation and review of your findings

	Reflect on the outcomes, what did you learn, to what extent was the project successful and why? if not, why not? In what way, if any, have you demonstrated the ethical standards?
AC	Information about next steps What have you learned and how will you use that to good effect? What are the next steps, short, medium and/or long term?

Appendix C4 - Workplace project report submission form

Apprentice name:	
Employer name:	
Training Provider name:	

Title of your workplace project:
<p>Apprentice statement:</p> <p>'I confirm that each statement below is correct:</p> <ul style="list-style-type: none"> a. The workplace project (the project) was agreed by the employer, training provider and EPAO b. The project report does not exceed 2,000 words (+/-10%) where word count does not include any appendices. c. The total appendices (where provided) does not exceed the total word count for the report. d. The report is completed in Arial 11 e. The workplace project report was started and completed after my Gateway assessment. f. The project is suitably anonymised ensuring that all sensitive school-based information is removed. g. The work presented within the report is my own and is a true reflection of events that occurred. h. I understand that as part of the end-point assessment, I must give a presentation lasting between 10 -12 minutes based on my workplace project, followed by 10 minutes of questions from the independent assessor relating to the project report and the presentation.' <p>Name Signed</p> <p>Date</p>

Employer **or** training provider statement:

'I confirm that each statement below is correct:

- a. The workplace project (the project) was agreed by the employer, training provider and EPAO
- b. The workplace project report was started and completed after Gateway assessment.
- c. The project is suitably anonymised ensuring that all sensitive school-based information is removed.
- d. To the best of my knowledge, the work presented within the report is the work of the apprentice and is an accurate reflection of events that occurred.'

Name Signed

Date

Appendix D1 – Portfolio of learning guidance document

All apprentices undertaking the SBP L4 Apprenticeship are required to provide a portfolio of learning during their on-training period.

The evidence within the portfolio of learning is used by the employer to support evaluation of whether an apprentice is consistently working at or above the level set out in the standard. This is one of the pre-requisites of entry to end-point assessment.

The portfolio of learning:

- is not assessed by the independent assessor at end-point assessment. However, it is viewed and evaluated by the assessor who will use it to plan questions to be asked on the day of assessment.
- must contain typically 10-12 discrete pieces of evidence and must have a minimum of one piece of evidence that demonstrates each KSB. BPN has structured the KSBs into 51 separate KSB statements linked to this particular Standard. This means that on average, each document will need to evidence 3-7 KSBs. This is not a rule. It is possible that a document may be used as evidence against just one KSB or that another is used as evidence against more than 7. The important requirement is that all 51 KSBs must be evidenced through the 10-12 documents.
- must contain evidence of 360° feedback. BPN do not stipulate which, if any, tool or resource should be used for this feedback; support if needed for this, should be provided by the employer and/or training provider. BPN do anticipate that 360° feedback involves self-reflection and feedback from at least 2 other individuals.
- must be holistically mapped against the KSBs with clear explanations of how the evidence covers each KSB. BPN provides a cover sheet document that must be completed for each document within the portfolio. This requires the apprentice to explain in up to 5 sentences how you believe this document provides evidence of each of the KSBs claimed – see Appendix D2
- can be in the form of reports, minutes, emails, stakeholder comments, peer reviews, performance reviews, policies the apprentice has contributed to, presentations etc. This list is not exhaustive.

BPN anticipate that the documents contained within the portfolio of learning **may** be directly or indirectly linked to the workplace project, however, it is not a requirement that they are. This enables the apprentice to demonstrate all KSBs across the range of documents and not just the KSBs covered in the workplace project.

Training Providers are responsible for submitting portfolios of learning. ACE360 supports training providers to do this during the on-programme stage of the apprenticeship. This in turn supports the training provider and employer in making a judgment that requirements have been met to proceed

to EPA. Once an apprentice has their status changed by the training provider to 'Gateway Approved' BPN will be able to view the e-portfolio.

Our Independent assessors will review the portfolio of learning prior to the Q & A session. They will prepare areas for questioning following the review of the apprentice's portfolio.

The portfolio of learning will underpin the EPA project report, presentation and Q&A completed during the EPA period.

Appendix D3 - Portfolio of learning document tracker

Insert a ✓ to show which documents you are using as evidence against each KSB. Hint: copy and paste this ✓ into the relevant cell.

Important notes:

1. Each document can be used as evidence against a range of KSBs.
2. You will need to complete a cover sheet for **each** document on which you explain why you believe the document is evidence of each KSB claimed.
3. Documents may be directly or indirectly linked to your workplace project, but this is not a requirement.
4. All KSBs must be ticked at least once in order to meet the requirements of the portfolio of learning and the assessment plan.
5. The assessment plan states that the portfolio of evidence should typically include 10-12 discreet documents. We strongly suggest a minimum of 10. Apprentices should only exceed 12 following discussion with the training provider and should never exceed 14 in any circumstance.

Name:												
Knowledge Criteria	Document 1	Document 2	Document 3	Document 4	Document 5	Document 6	Document 7	Document 8	Document 9	Document 10	Document 11	Document 12
KFN1												
KFN2												
KFN3												
KFN4												
KPR1												
KPR2												
KPR3												
KHR1												
KHR2												
KHR3												
KMS1												
KMS2												
KMS3												

KMS4												
KGR1												
KGR2												
KGR3												
KGR4												
KMK1												
KMK2												
KMK3												
KIN1												
KIN2												
KIN2												

Skills Criteria	Document 1	Document 2	Document 3	Document 4	Document 5	Document 6	Document 7	Document 8	Document 9	Document 10	Document 11	Document 12
SFM1												
SFM2												
SFM3												
SFM4												
SPM1												
SPM2												
SPM3												
SCM1												
SCM2												
SRB1												
SRB2												
SSM1												

SSM2												
SSM3												

Behaviours Criteria	Document 1	Document 2	Document 3	Document 4	Document 5	Document 6	Document 7	Document 8	Document 9	Document 10	Document 11	Document 12
BCC1												
BCC2												
BCC3												
BDM1												
BSN1												
BSN2												
BSN3												
BCB1												
BCB2												
BCB3												
BRS1												
BCH1												
BCH2												

Appendix F - Gateway agreement form

Apprentice name:	
Employer name:	
Training Provider name:	

Employer statement:

I confirm that each statement below is correct for the apprentice named above:

- I am satisfied that the apprentice is consistently working at or above the level set out in the standard.
- The apprentice has completed a portfolio of learning that contains approximately 10-12 discreet pieces of evidence and provides evidence of all KSBs set out in the Standard.
- The portfolio of learning contains evidence of 360° feedback.
- The apprentice has completed a workplace project based on two of the following areas of the standard; Finance, Procurement, Human Resources, Managing Support Services, Marketing and Infrastructure.
- The apprentice has provided evidence to prove they hold English and maths level 2 qualification as a minimum.
- The apprentice has completed a minimum of 12 months training
- The apprentice has received 20% off the job training throughout the duration of the training programme
- The gateway assessment for the apprentice is now successfully completed and they are eligible to proceed to end-point assessment.

Name Signed

Date

Appendix G - Confirmation of workplace project requirements

Apprentice name:	
Employer name:	
Training Provider name:	

Employer / Training Provider statement:

'I confirm that the apprentice named above has:

- a. undertaken research and analysis of a workplace project during their On-programme Period,
and
- b. Completed a workplace project

as per the Assessment Plan.'

Name Signed

Role

Date