Transitioning to the new Business Administrator apprenticeship standard

Presenters:

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Sylvia Sims, Sector Lead – SEQA for City & Guilds

Tom Pearce, Talent Services Executive – Grant Thornton

16 November 2017

Agenda

- Overview of the apprenticeship reforms
- Planning your transition
- Background
- Business Administrator standard
- Business Administrator assessment plan
- Planning your delivery – points to consider
- How we can support you to prepare for delivery and end-point assessment
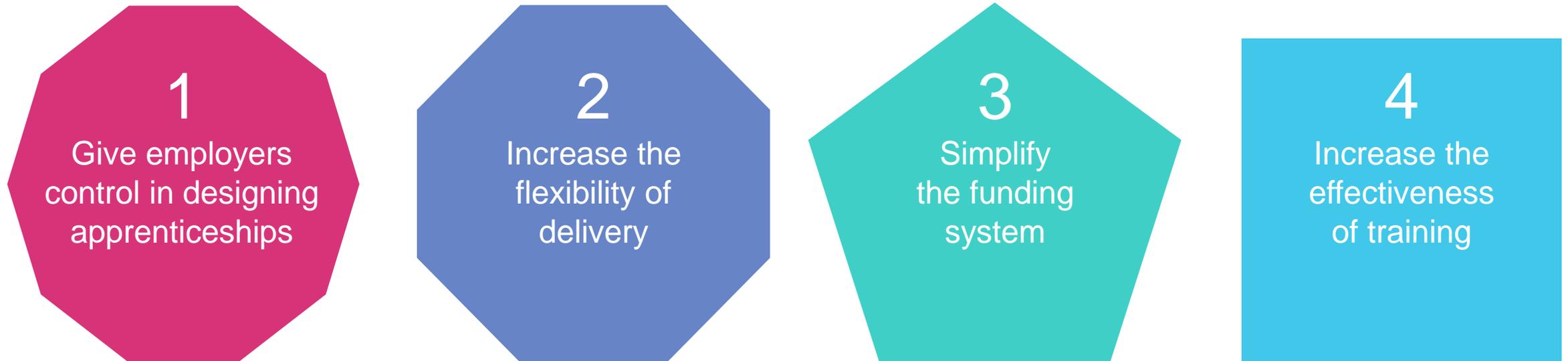- Next steps
- Q & A
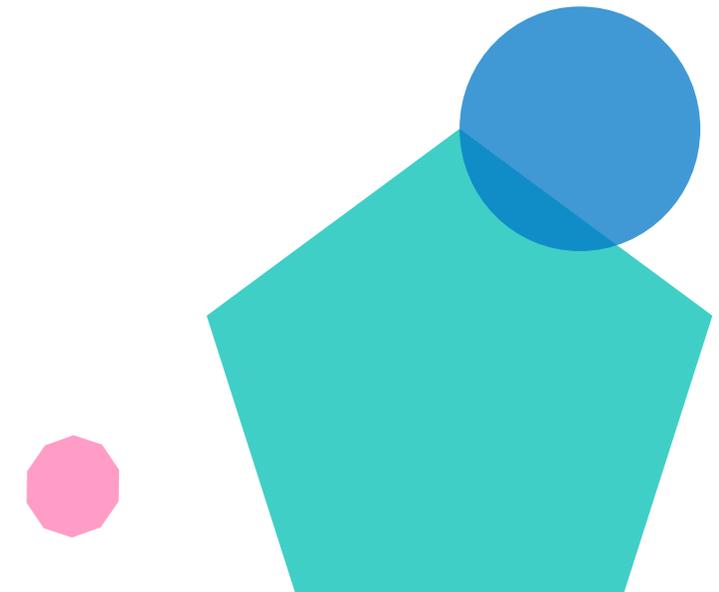
Overview of the apprenticeship reforms

Overview of the apprenticeship reforms

Apprenticeships are changing.
You are part of that change.

| 1 Give employers control in designing apprenticeships | 2 Increase the flexibility of delivery | 3 Simplify the funding system | 4 Increase the effectiveness of training |

If you'd like a summary of the main changes between the new apprenticeship standards and SASE frameworks, our **25-minute recorded session** is a really useful watch.
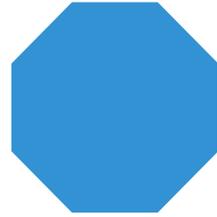
Planning your transition

Why planning is so important

- Reforms are happening now – you need to plan now

- Our customer research shows there's a high level of concern about readiness to deliver the new apprenticeship standards and the impact of the funding changes from May 2017

- This presentation may reassure you that your plans are well on track, or it may help you identify your action plan to move forward

- We can help you, whatever stage you're at
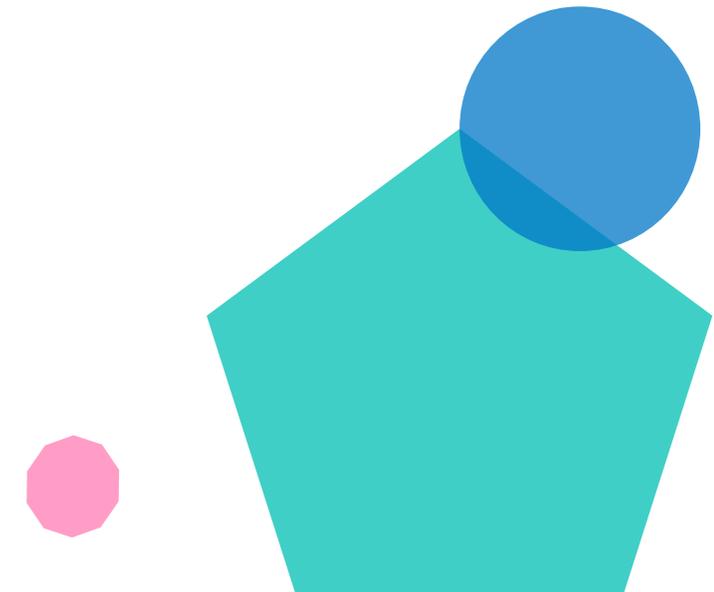
When (or if) to make the change

There are four options and they have different consequences:

1 **Stay with SASE frameworks**
Funding may not be enough to deliver, and potential for loss in revenue - switch off predicted by 2020

2 **Stay with SASE frameworks for now**
Probable short term financial challenges but time to plan for embedding the new standards

3 **Move to new standards straight away**
Potential for more funding now the levy has started

4 **Stop delivery for now**
Loss of income until you implement a new plan
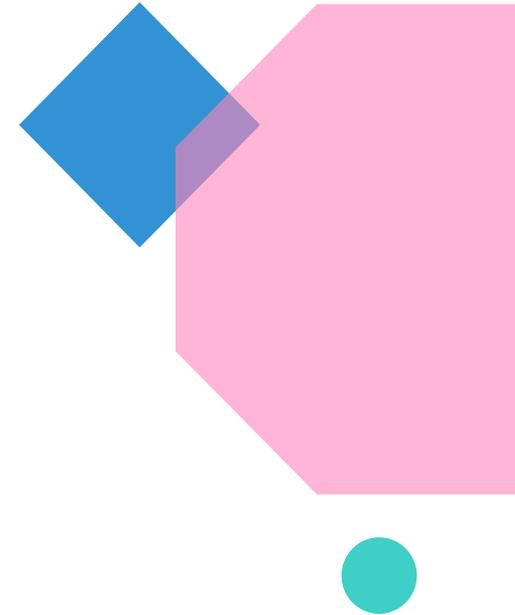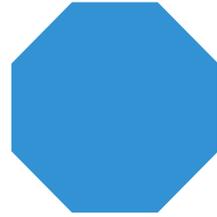
Background to the Business Administrator employer group

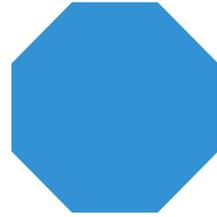Tom Pearce, Talent Services Executive
- Grant Thornton

Employer group:

The Business Administrator standard was developed by:

Funding information
Funding band: 7
Funding band maximum: £5,000

- Grant Thornton UK LLP
- BT
- Npower
- Federation of Small Businesses
- Peter Jones Foundation
- MBDA Missiles
- Surrey County Council
- Peugeot
- Sodexo
- oneSource
- London Borough of Islington
- London Borough of Enfield
- Total Security Services
- Skills CFA
- PRCA
- ESOS Ltd
- Ceridian UK & Ireland

- Northgate Arinso
- JJBA Ltd
- Bradley & Co Ltd
- Business Resource & Innovation Network International Ltd
- Moorhouse Accounting & Consultancy Services Ltd
- Vicki King Bookkeeping Services
- Fresh Financials
- Iwona Accountancy Services Ltd
- Boots UK
- Osborne Property Services
- Carillion PLC
- Bpi Recycled Products
- Great Guns Marketing
- Berkley Group PLC

- Prohire Software Systems Ltd
- Scottish Water
- Enfield Council
- Royal Navy/Babcock
- Thames Valley Police
- Army Personnel Services Group
- Northern PowerGrid
- Manheim
- Royal Bank of Scotland
- Institute of Customer Service
- Serco
- Homebase
- British Council
- Capita Group
- Accelerator Solutions Ltd

What is a new apprenticeship standard?

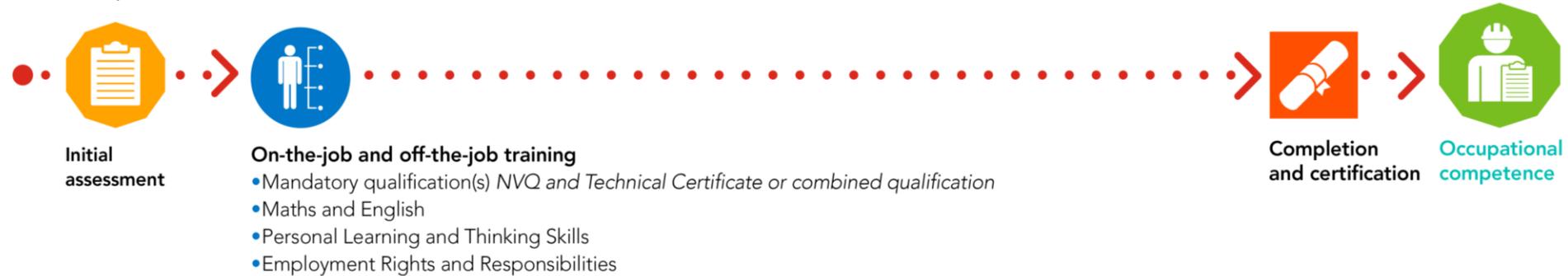# New apprenticeship standards

Key points:

- competency-based programme that assesses an individual's ability to carry out a specified job role against nationally recognised standards

- puts employers 'in the driving seat' in terms of design

- linked to specific job roles and levels

- combine on-programme training and learning with independent end-point assessment

- must last a minimum of 12 months.

SASE framework to apprenticeship standard – the changes

SASE frameworks
(multi-occupational)

Initial assessment

On-the-job and off-the-job training
- Mandatory qualification(s) *NVQ and Technical Certificate or combined qualification*
- Maths and English
- Personal Learning and Thinking Skills
- Employment Rights and Responsibilities

Completion and certification

Occupational competence

Apprenticeship standards
(individual standards per occupation)

Initial assessment

On-programme phase: on-the-job and off-the-job training
- Qualifications are not mandatory
  Trailblazer groups can choose to build qualifications into standards, either mandatory (in the standard) or recommended (in the assessment plan). If qualifications are not written into a standard, providers can still build them into their apprenticeship programme
- Maths and English
- Formative assessment of behaviour

Gateway
Employer and provider sign off learner

End-point assessment

Completion and certification

Occupational competence

Off-the-job training, the vital 20%

Off-the-job training must be directly relevant to the apprenticeship standard and must take place within the apprentice's normal working hours. It can include:

Teaching of theory - lectures

Simulated exercises and role play

Attendance at competitions

Manufacturer training e.g. new equipment or technologies

Learning support provided by employer or the provider

Some online learning e.g. webinars or blended learning

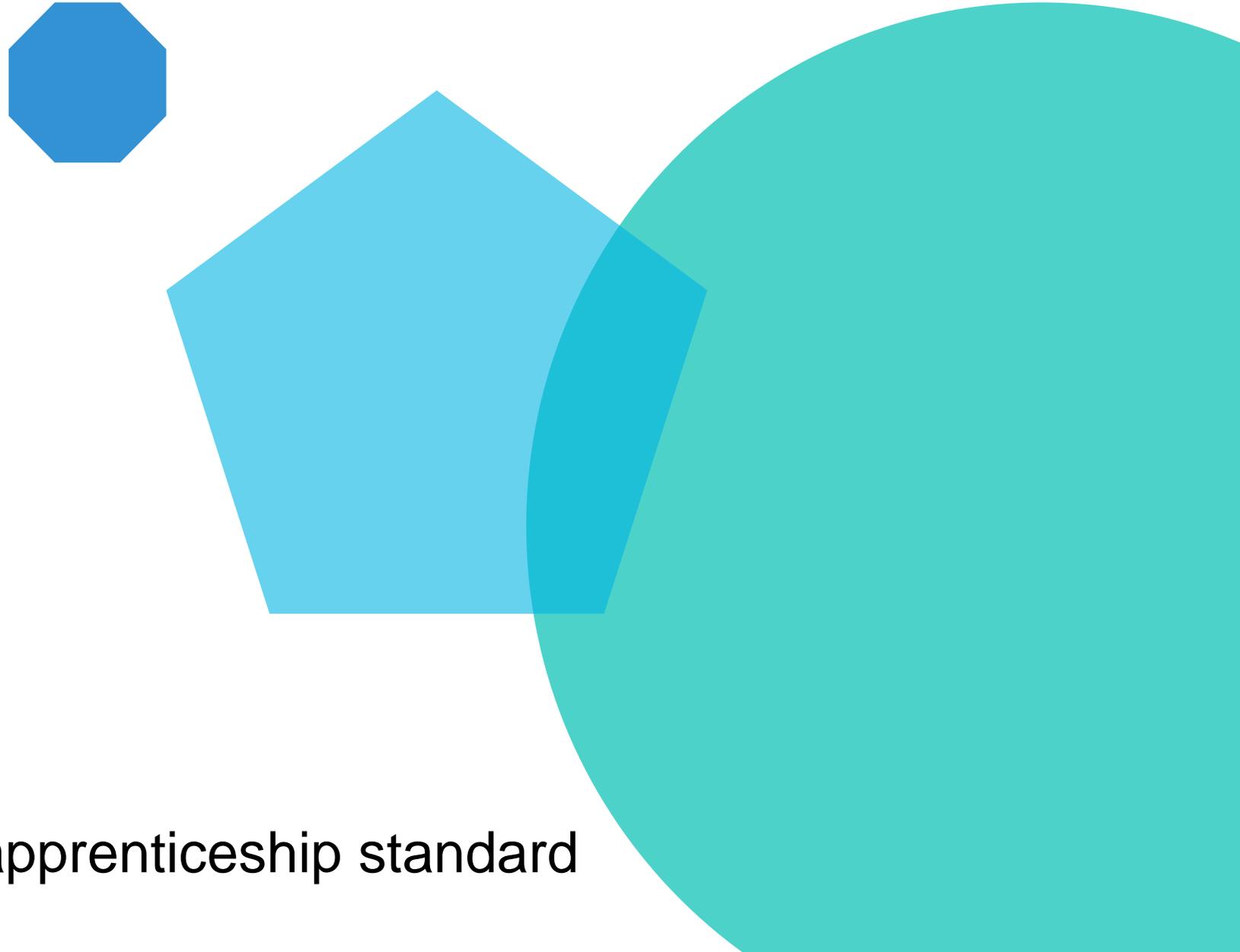Shadowing or being mentored

Practical training

Visiting the employer's other departments

Time spent by the apprentice writing assessments/assignments

Industry visits or visiting other companies or suppliers

Business Administrator apprenticeship standard

Key documents

**The Business Administrator apprenticeship standard**
- Short, easy to understand document that describes the competencies required to undertake that occupation well.

- Designed by the employer group.

- Approved by BEIS.

The assessment plan
- Describes the learner journey and IEPA for that particular apprenticeship standard.

- What will be assessed; how it will be assessed; who it will be assessed by.

The end-point assessment pack
- Describes the EPA process in detail.

- Contains the requirements to prepare for EPA.
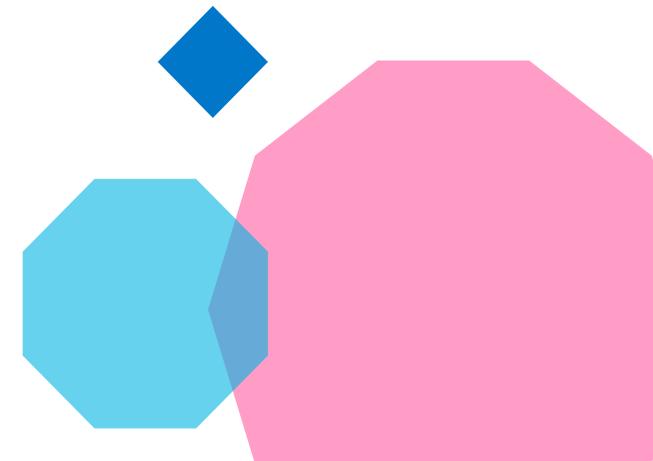
Business Administrator standard
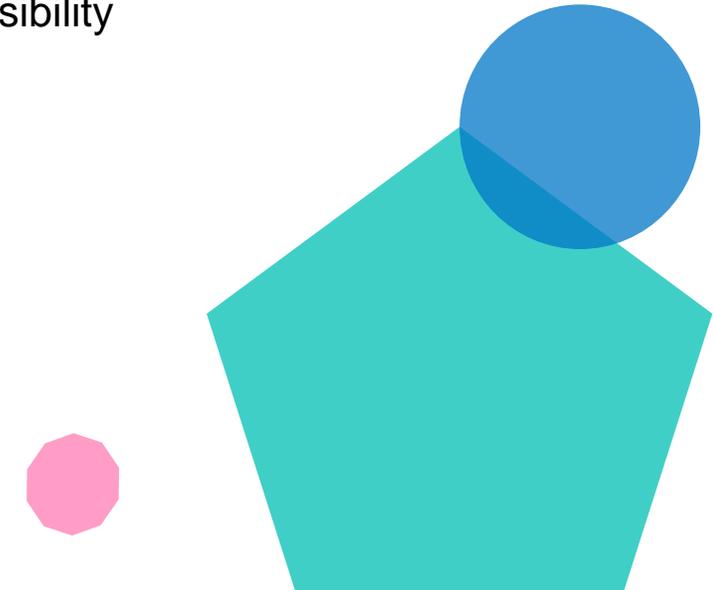
Knowledge "know it"

- The organisation
- Value of their skills
- Stakeholders
- Relevant regulation
- Policies
- Business fundamentals
- External environment factors

Skills "show it"

- IT
- Record and document production
- Decision making
- Interpersonal skills
- Communication
- Quality
- Planning and organisation
- Project management

Behaviours "live it"

- Professionalism
- Personal qualities
- Managing performance
- Adaptability
- Responsibility

Behind the words

What's being looked for in the standards? Example:

Section	Item	Requirement
Skills	Decision making	Exercises proactivity and good judgement. Makes effective decisions based on sound reasoning and is able to deal with challenges in a mature way. Seeks advice of more experienced team members when appropriate.
	Interpersonal skills	Builds and maintains positive relationships within their own team and across the organisation. Demonstrates ability to influence and challenge appropriately. Becomes a role model to peers and team members, developing coaching skills as they gain area knowledge.
Knowledge	The organisation	Understands organisational purpose, activities, aims, values, vision for the future, resources and the way that the political/economic environment affects the organisation.
	Relevant regulation	Understands laws and regulations that apply to their role including data protection, health and safety, compliance etc. Supports the company in applying the regulations.
Behaviours	Personal qualities	Shows exemplary qualities that are valued including integrity, reliability, self-motivation, being pro-active and a positive attitude. Motivates others where responsibility is shared.
	Adaptability	Is able to accept and deal with changing priorities related to both their own work and to the organisation.

The Business Administrator standard – assessment method and grading criteria (annex)

Module	Standard	Assessment method	Fail criteria	Pass criteria	Distinction criteria
IT	Skilled in the use of multiple IT packages and systems relevant to the organisation in order to: • write letters or emails • create proposals • perform financial processes • record and analyse data. Examples include MS Office or equivalent packages. Able to choose the most appropriate IT solution to suit the business problem. Able to update and review databases, record information and produce data analysis where required.	• Portfolio-based interview • Project • Improvement presentation	• Has not demonstrated they can use IT packages. • Unable to provide quality examples of when they have used IT packages without mistakes.	• Demonstrated they can use IT packages, specifically to write letters or emails, and to record and analyse information. • Able to perform tasks relevant to their role using IT packages without supervision.	• Consistently demonstrates they can use IT packages and can provide varied, quality examples. • Able to perform tasks relevant to their role using IT packages and can coach others in using IT.

The Business Administrator Standard - Mapping

Knowledge	Apprenticeship What is required	City & Guilds qualification units and learning outcomes for the Level 3 Diploma in Business Administration (5528-03)
The organisation	Understands organisational purpose, activities, aims, values, vision for the future, resources and the way that the political/economic environment affects the organisation	227 – Employee rights and responsibilities LO1 – Understand the role of organisations and industries 320/690 – Principles of business LO1 – Understand business markets 321 – Manage an office facility LO1 – Understand the management of an office facility 324/694 – Understand the customer service environment LO1 – Understands the concepts and practices underpinning customer service delivery LO2 – Understand the relationship between customer service and a brand LO3 – Understand the structure of customer service *The learner will also need to demonstrate their understanding of the different sizes of organisations, in particular relating to the size of their own and the differences pertaining to the political/economic environment.*
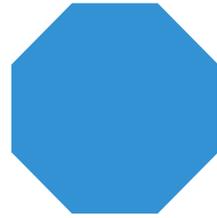
Business Administrator end-point assessment

Entry requirements for EPA:

- A business administrator must have achieved Level 2 English and maths before taking end-point assessment.

- The portfolio must be completed to trigger the gateway (compiled on-programme from 3-12 months onwards).

- Gateway can be triggered after 12 months of starting the apprenticeship.

- Complete gateway declaration form.

- Book EPA 90 days in advance of EPA taking place.

EPA and overall grading

Assessment methods for EPA	Overall grading
Knowledge test (60 Minutes) Portfolio-based Interview (30-45 Minutes) Project/improvement Presentation (20-30 Minutes)	Fail
	Pass
	Distinction
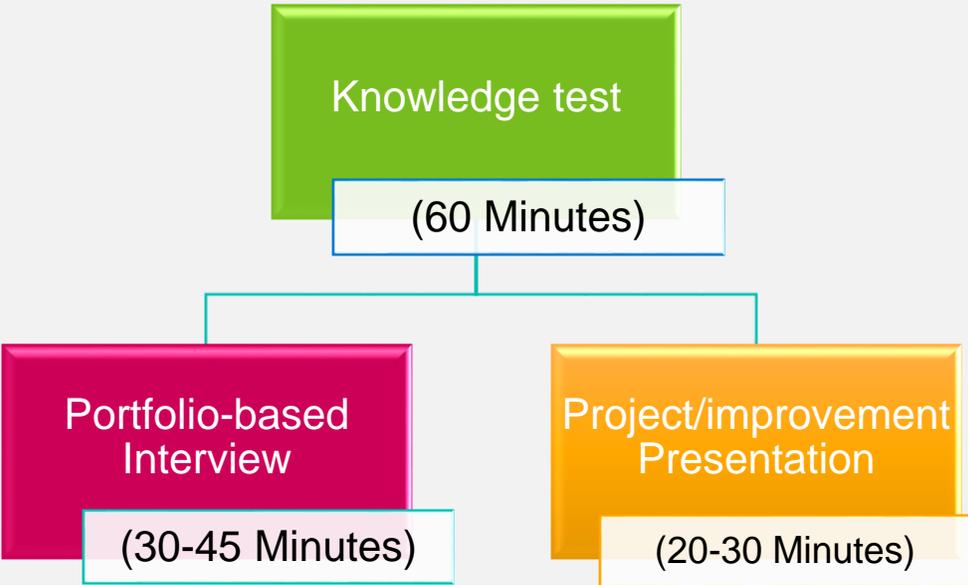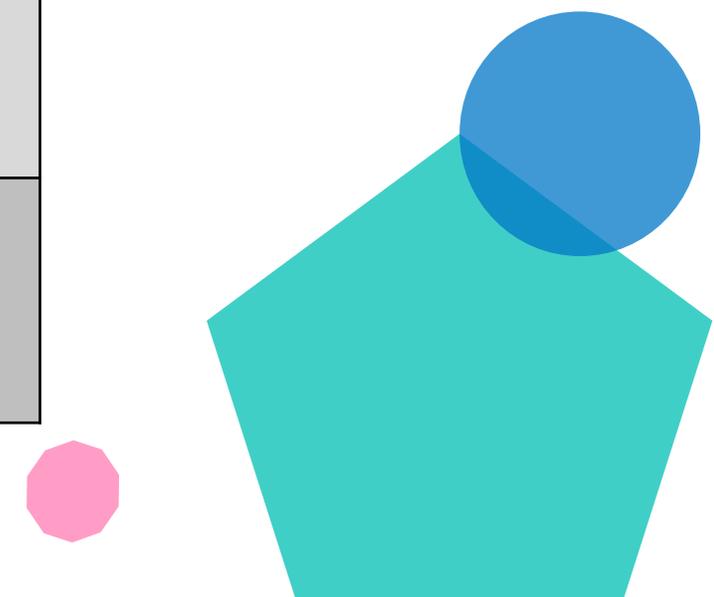
End-point assessment and overall grading

Each assessment method is graded as follows:

Assessment method	Grade and boundaries			Weighting to overall grade
Knowledge test	Fail (less than 60%)	Pass (60-79%)	Distinction (80% and over)	20%
Portfolio-based interview	Fail (less than 60%)	Pass (60-79%)	Distinction (80% and over)	40%
Project/presentation	Fail (less than 60%)	Pass (60-79%)	Distinction (80% and over)	40%

- Each assessment has a pass mark of **60%** and must be passed in order to achieve an **overall pass** for the apprenticeship.

- The achievement in **each** assessment is **aggregated** based on the **weighting and grading boundaries**, in order to give the overall grade for the apprenticeship.

Business Administrator independent end-point assessment – knowledge test

- This assessment is completed on-line and requires invigilating.

- 60 minutes – 50 equally weighted multiple-choice questions with four possible answers each.

- It assess the knowledge and skills of the standard as indicated in the assessment methods and grading criteria (annex).

- It focuses on non-organisation specific knowledge such as relevant regulation and laws, business fundamentals and project management principles.

- It should typically be passed before the apprentice progresses to the portfolio-based interview and project/improvement presentation.
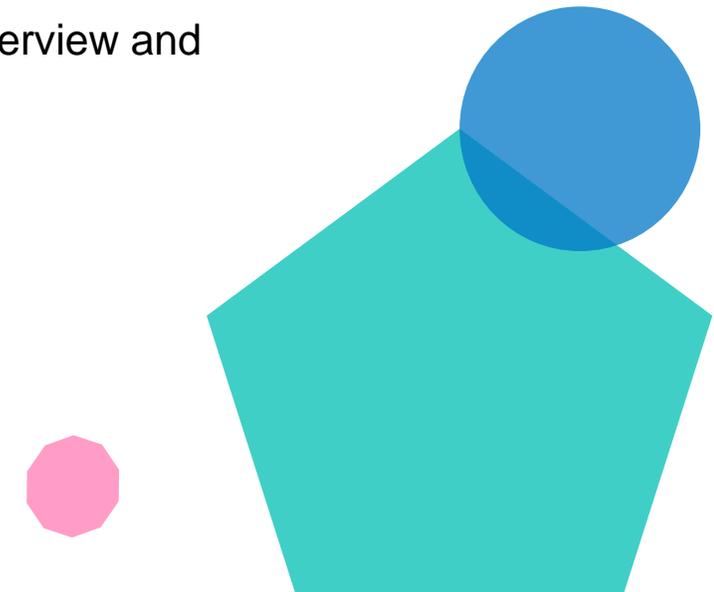
Business Administrator independent end-point assessment – portfolio-based interview

- Employer and training provider to review and make judgment on whether apprentice should progress to EPA.

- The portfolio should be submitted to the EPA organisation **a month prior** to the interview, so that the independent end-point assessor can look at the content and prepare in advance.

- This assessment is very likely to be completed remotely.

- 30-45 minutes of interview.

- Portfolio is **not** directly assessed, but used to frame the discussion at interview.

- The interview assesses:
  - understanding of the portfolio to validate competence shown
  - self-reflection of performance, demonstrating knowledge and how appropriate skills and behaviours have been applied
  - judgement and understanding to explain appropriate examples.

Business Administrator independent end-point assessment portfolio-based interview

- Evidence could include practical observation and/or evaluation by the employer, such as acknowledgment of a skill shown or evidencing work completed on a particular project with manager comments, then discussed at interview.

- Evidence of work gathered on-programme that demonstrates the apprentice's competence against the standard.

- It assesses the knowledge, skills and behaviours of the standard as indicated in the assessment methods and grading criteria (annex). The portfolio should include at least **one** piece of evidence for **each of the minimum knowledge, skills and behaviours**.

- Minimum 8-12 pages is expected for consistency which should be holistic evidence.

- The independent end-point assessor has the final decision on grading.

Business Administrator independent end-point assessment – project/improvement presentation

- This assessment is likely to be completed remotely.

- 10-15 minutes presentation with a further 10-15 minutes for a question and answer session.

- The apprentice chooses the project/process improvement with guidance from the employer and training provider in line with the guidance from the EPA organisation.

- The project/process improvement is completed from month nine of the apprenticeship and should be completed prior to EPA being triggered.

- It should be submitted to the EPA organisation **a month prior** to presentation, so that the independent end-point assessor can look at the content and prepare in advance.

- It assesses the knowledge, skills and behaviours of the standard as indicated in the assessment methods and grading criteria (annex).

- The presentation is to be produced on PowerPoint or Prezi, demonstrating the minimum level of IT skills and effective communication in delivery.
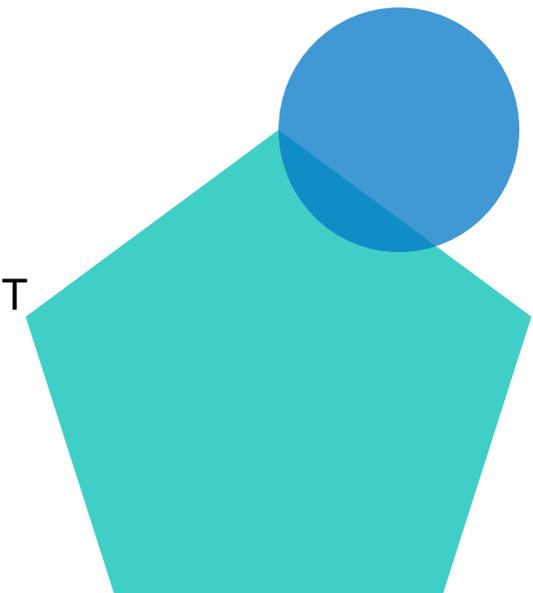
Business Administrator independent end-point assessment – project/improvement presentation

- The presentation should include:

    - the aim, outcome and responsibilities of the KSBs shown in the project/process improvement

    - scoping, planning, managing, decision making in prioritising areas, communicating to stakeholders and monitoring and reporting results.

    - how they've approached a task and the skills shown in doing so

    - how they would improve the results going forward.

- The project/process should account for 21-35 working hours over the apprenticeship and be work-based.

- The independent end-point assessor has the final decision on grading.
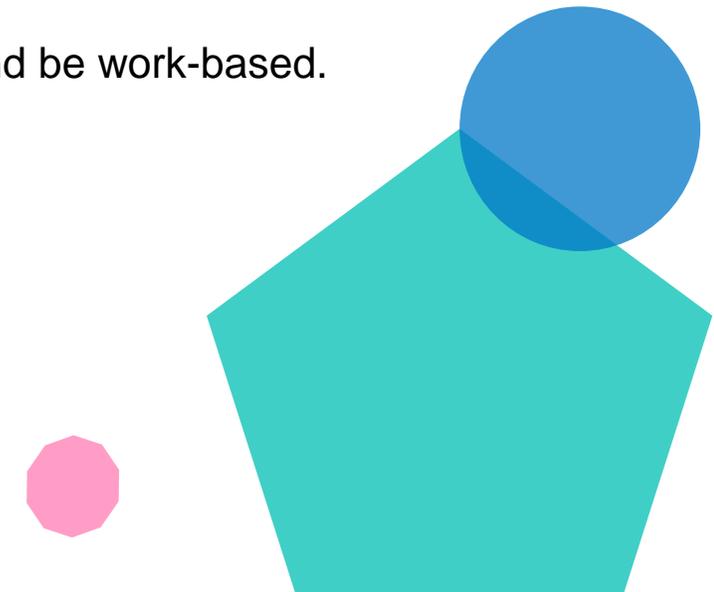
End-point assessment pack
For centres/customers/employers

Key document for centres/customers/employers for the planning and delivery of the apprenticeship.

It will include:

- the standard
- guidance on how to book EPA
- guidance on how to prepare for the **portfolio-based interview** and **project/improvement presentation** and how they will be assessed – against relevant sections of the assessment methods and grading criteria (annex)
- guidance on examples of possible evidence
- separate pack with recording forms.

Timeline of events – Business Administrator end-point assessment

November 2017

December 2017 – April 2018

May 2018

June/July 2018

✓ Register or end-point assessment organisations submission for Business Administrator

✓ Webinar – transition to the new Business Administrator apprenticeship standard

✓ Recruitment of independent end-point assessors will start when we're approved on the register or end-point assessment organisations

✓ EPA guidance pack available

✓ EPA recording form pack available

✓ EPA resources available

✓ EPA booking reservation window opens July 18 (EPA available Oct 18 – 90 day notice required)

✓ Training independent end-point assessors June 18

The City & Guilds offer

What is available to support on-programme delivery

On-programme offer packaged resources

Apprenticeship Training Manual

Tutor content to support delivery (skills scans, delivery models)

Qualifications

Mapping to existing Business Administration qualification (5528)

Maths and English – essential for gateway

Sample knowledge tests

Initial assessment and diagnostic, maths and English e-toolkit.

Learner progress and on the job tracking tool, built in e-version of training manual

Mapping to maths and English
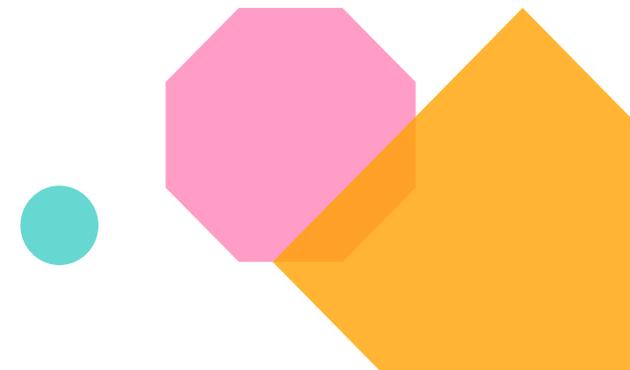
Supporting successful on-programme delivery

High-quality teaching and learning components

Systems to structure, deliver and track learning

Options to deliver mapped qualifications

Task 2

Induction part two:
Understanding customer expectations

To complete this task you will be looking at your own expectations, as a customer of other organisations. You will also consider your role in meeting the expectations of customers within your own organisation.

When completing this task, you will:
- name an organisation you have high expectations of
- name an organisation you have low expectations of
- consider how these expectations might be changed.

Flexibility of offer to suit occupations

High-quality teaching and learning materials

Content from a range of sources personalised to meet learners' needs

Main features of our on-programme offer

Breadth of occupations

Range of qualifications for employers' needs

Systems to support delivery and tracking

Well prepared apprentices for EPA
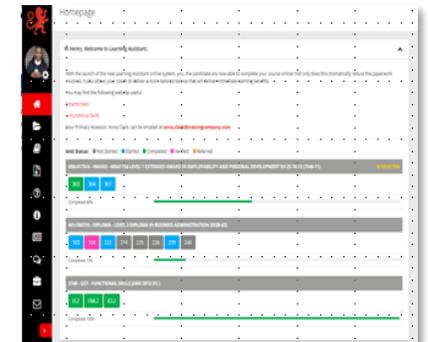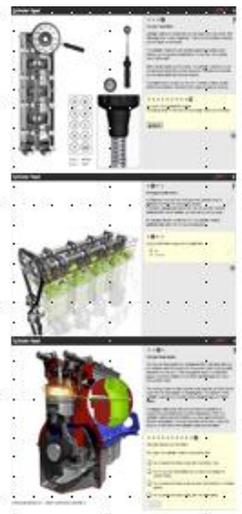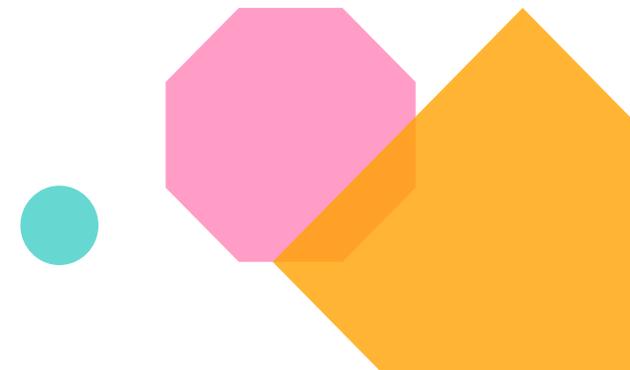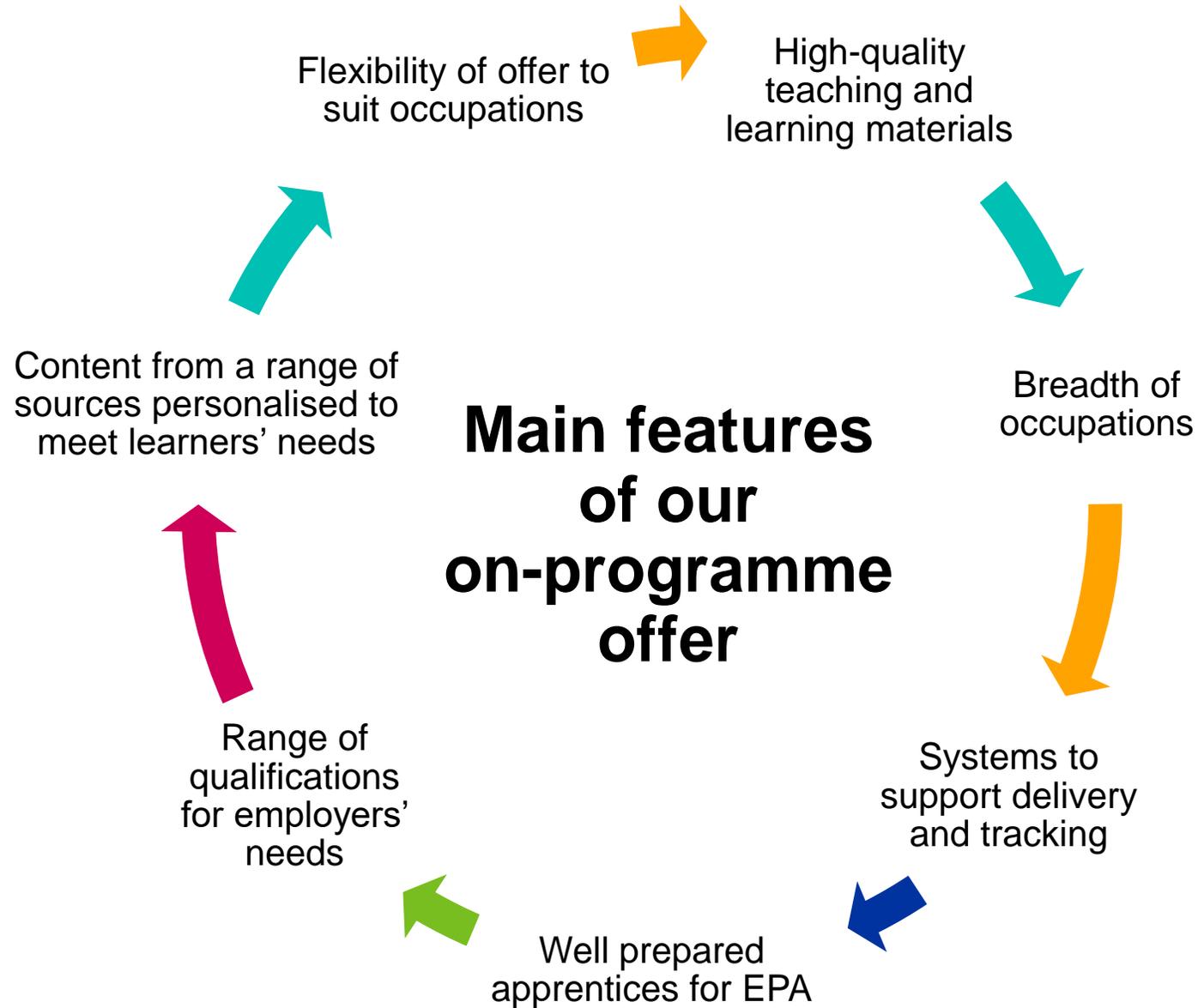
Simple steps to plan

- Whether you're an employer or an employer-provider, follow our step-by-step guide to developing your apprenticeship programme.

Employer's guide
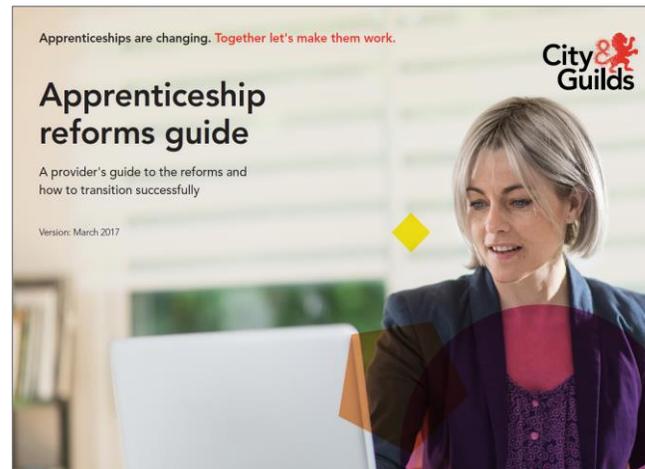
Provider's guide
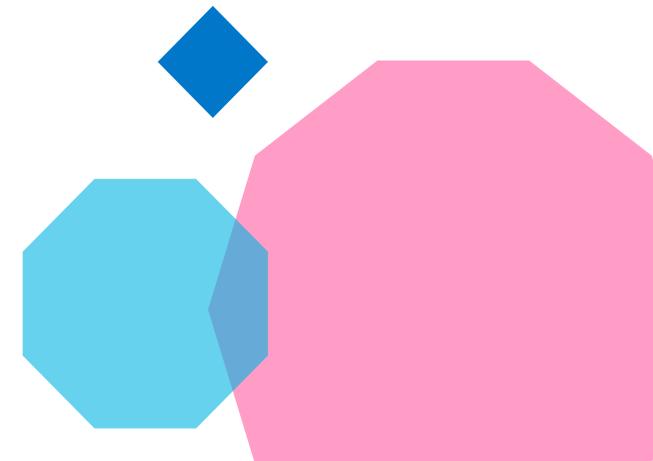
Apprenticeship Training Manual

- Includes 30 tasks that support the apprentice's progression to the gateway during on-programme.

- Provides an overview of the apprentice journey and full mapping to the standards.

- Available in print and electronic versions.

- Contains a list of key terms and their definitions.

- Details how each task relates to the standards.

- Preparatory activities to check learner understanding.

- Practical tasks to allow the learner to apply their knowledge to their own role and organisation.

- Reflective practice for learners to consider what they've learnt, what they need to improve and how to do it.

Apprenticeship Training Manual
Level 2

City & Guilds
A City & Guilds Group Business

Customer Service Practitioner

Learner and tutor support

- Apprenticeship Training Manual – publication available April 2018/PDF version available soon via SmartScreen.

- SmartScreen – new tutor materials and EPA preparation resources, available soon.

- Mapping to existing Business Administration qualification.

- Signposting to maths and English.

Teaching programme support

Using this manual 4
How the Customer Service Practitioner programme works 6
Customer Service Practitioner standards 9
How the standards map to the tasks 16
Task progress checklist 18
Reflective practice – making the most of your learning 19
Task 1: Induction part one – Understanding organisation types .. 29
Task 2: Induction part two – Understanding customer expectations .. 39
Task 3: Creating a Personal Development Plan 51
Task 4: Presenting a professional image 69
Task 5: Using feedback from colleagues 83
Task 6: Organising, prioritising and monitoring your workload .. 93
Task 7: Using organisational systems and resources 107
Task 8: Meeting legislation and regulations 117
Task 9: Treating all customers with equality and as individuals .. 135
Task 10: Interacting effectively with customers 147
Task 11: Providing a customer-focused experience 169
Task 12: Knowing your products and services 183
Task 13: Using digital media 199
Task 14: Improving your customer service offer 207
Task 15: Dealing with conflict 221
Glossary of key terms 241

Task1 - Induction part one - Understanding your organisation — NOT STARTED
> Task1.1 - Induction part one - Understanding organisation types
Total Docs: 0 — Release — Exclude — Not Started
Started 0% — Completed 0% — Set Deadline

Task2 - Induction part two – Understanding customer expectations — STARTED
> Task2.1 - Induction part two – Understanding customer expectations
Total Docs: 1 — Release — Exclude — Started
Started 100% — Completed 0% — Set Deadline

Task3 - Creating a personal development plan
> Task3.1 - Creating a personal development plan
Total Docs: 0
> Task3.2 - Personal Development Plan - Quarter 1
Total Docs: 0
> Task3.3 - Personal Development Plan - Quarter 2
Total Docs: 0
> Task3.4 - Personal Development Plan - Quarter 3
Total Docs: 0
> Task3.5 - Personal Development Plan - Quarter 4
Total Docs: 0
> Task3.6 - Learning Log
Total Docs: 0
Started 0% — Completed 0%

Induction part one - Understanding organisation types

Preparatory activities
1. Explain one key similarity and one key difference between public and private sector businesses.
Similarity
Difference

2. Explain one key similarity and one key difference between public and third sector businesses.
Similarity
Difference

3. Explain one key similarity and one key difference between private and third sector businesses.
Similarity
Difference

JUMP TO FIELD:
Preparatory activities 1. Explain one key similarity and one key difference between public and private sector businesses. Similarity
Difference
2. Explain one key similarity and one key difference between public and third sector businesses. Similarity
Difference
3. Explain one key similarity and one key difference between private and third sector businesses. Similarity
Difference
4. Identify which one of the sectors listed your organisation exists in.
5. Based on your answers to the above, and by taking account of current events, carry out a SWOT analysis on your organisation's sector: Stengths
Weaknesses
Opportunities
Threats

Maths and English – what can we offer?

Qualifications

- Full suite of Functional Skills qualifications (3748).

- 'Bite-sized' maths and English qualifications (3847 and 3844).

  - Can be used to support progression towards Functional Skills or GCSE.

Learning resources

- e-Functional Skills.

- Maths and English e-Toolkit.

- Functional Skills SmartScreen resources.

Workforce support

- Qualifications for literacy and numeracy practitioners.

- Specialist support, especially with maths and English integration.
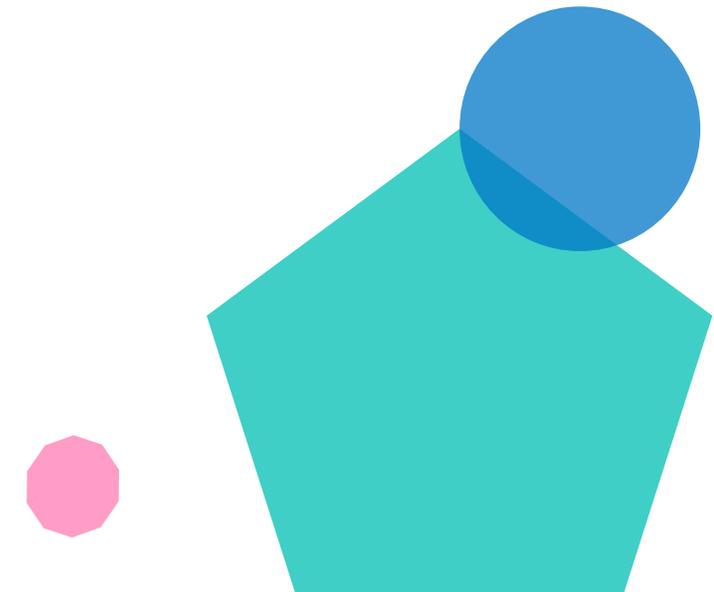
Timeline of events – Business Administrator on-programme

October

2017

November

2017

December

2017

January

2018

April

2018

May

2018

✓ Mapping of BA standard to existing 5528 qualification available

✓ Scoping of the new Business Administrator qualification

✓ Webinar for Business Administrator standard

✓ Scoping and development of the new qualification

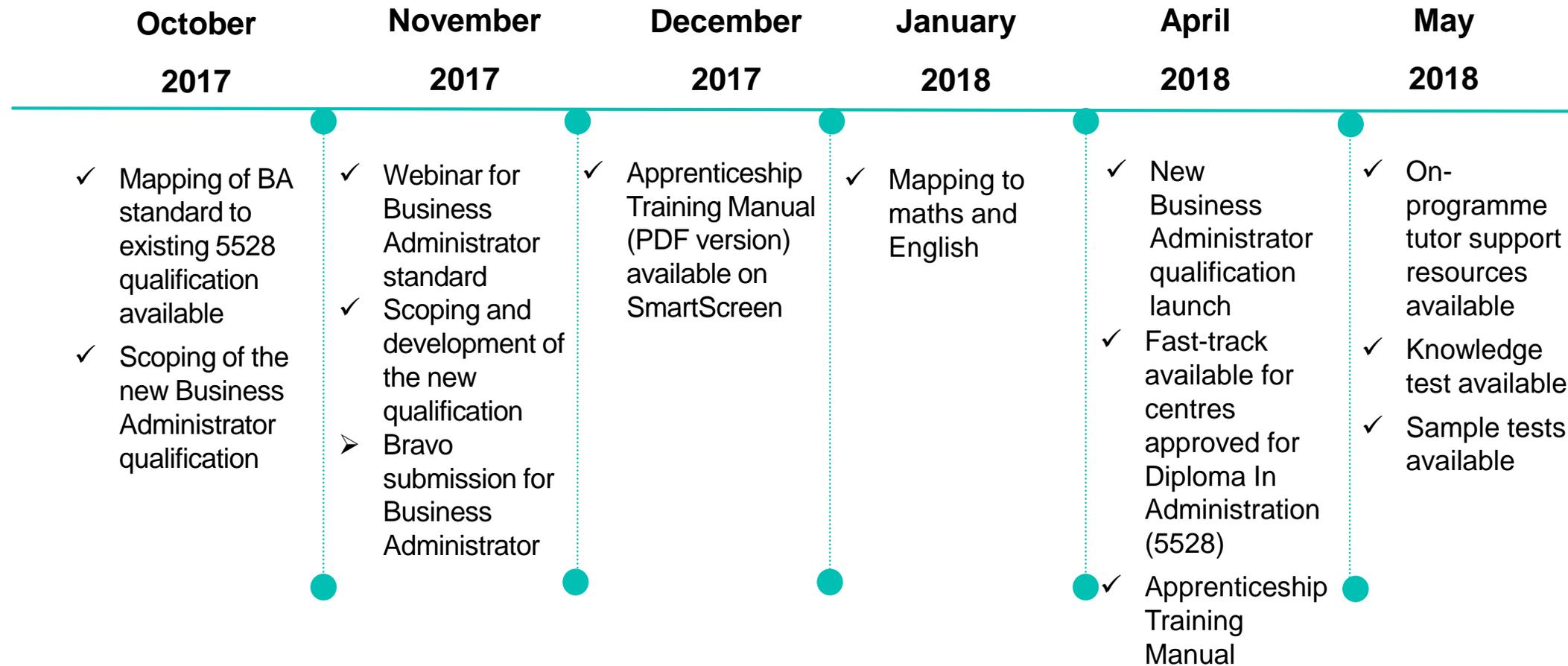➢ Bravo submission for Business Administrator

✓ Apprenticeship Training Manual (PDF version) available on SmartScreen

✓ Mapping to maths and English

✓ New Business Administrator qualification launch

✓ Fast-track available for centres approved for Diploma In Administration (5528)

✓ Apprenticeship Training Manual

✓ On-programme tutor support resources available

✓ Knowledge test available

✓ Sample tests available

How it works

The end-point assessment journey, step-by-step

1 Recruit and induct the apprentice

2 Provider registers apprentice on ILR, Apprenticeship Service* and fees agreed with employer**

3 Provider registers apprentice on Walled Garden to access learning materials

4 Learner completes on-programme activity (at least 12 months)

8 The EPA

7 Provider gives EPA team evidence for gateway and signs off apprentice as ready with employer

6 EPA team contacts customer to confirm dates

5 Provider makes reservation request (90 days before EPA)Ɨ

9 EPA results processed and grade confirmed

10 City & Guilds statement of achievement issued to provider

11 EPA team uploads evidence to ESFA for apprenticeship certificate

Apprenticeship achieved and certificate issued direct to employer

* Can also be done by employer ** Where known; if not known the EPA cost and awarding organisation can be added later   Ɨ Ideally done alongside stage 4

How you and your team can stay up to date

- Register for email updates: cityandguilds.com/what-weoffer/centres/email-updates to hear about new standards, free webinars on the changes, regional networking sessions and other events.

- Get involved in the developments of new apprenticeship standards by emailing our product team through apprenticeships@cityandguilds.com.

- Watch our webinar on digital learning materials https://attendee.gotowebinar.com/recording/12333258740_02209283 or email directsales@cityandguilds.com to request a demo

- For more information on end-point assessment email the team on epa@cityandguilds.com

What do you need from City & Guilds?

Email our dedicated team:

apprenticeships@cityandguilds.com

Thank you