

SCHOOL BUSINESS PROFESSIONAL APPRENTICESHIP LEVEL 4

End Point Assessment Plan

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Introduction

This document sets out the requirements for end point assessment (EPA) for the School Business Professional (SBP) apprenticeship standard. It is written for end point assessment organisations (EPAOs) who need to know how EPA for this apprenticeship must operate. It will also be of interest to SBP apprentices, their employers and training providers.

The SBP role is vital in educational settings ensuring the optimum deployment of resources targeted at raising pupil attainment. SBPs are responsible for managing a wide range of operational activities and providing essential support to school leadership teams.

The apprenticeship will typically take 18 months to complete, with 20% off-the-job training, although the exact duration will be dependent on the previous knowledge, skills and experience of the individual.

The EPA should only start once the employer is satisfied that the apprentice is consistently working at or above the level set out in the standard, the pre-requisite EPA gateway requirements for EPA have been met and that they can be evidenced to an EPAO. Employers may wish to take advice from the apprentice's training provider(s).

EPA gateway requirements are a portfolio of learning, completion of a workplace project and English and mathematics level 2 as a minimum.

The EPA must be conducted by an independent assessor appointed by an EPAO. EPAOs approved to offer EPA for this apprenticeship are shown on the Register of End Point Assessment Organisations (RoEPAO).

The EPA will test the apprentice against the entire standard. It consists of 2 assessment methods:

- **Simulated task.** The apprentice will be given a scenario situation, and, in timed controlled conditions, asked to write a short report and make a presentation which will be followed by questions.
- **Project report & presentation with questions and answers (Q&A).** The apprentice will write a formal, detailed structured report on the on-programme workplace project they have completed. Both the project and the project report must be verified as the apprentice's own work. The project report and presentation must be started and completed post-gateway. Verification must be provided by the employer confirming that the work produced is that of the apprentice. The presentation of this will be followed by questions.

The knowledge, skills and behaviours (KSBs) to be tested by each assessment method are set out in Annex 1.

To pass the EPA apprentices must demonstrate that they have achieved the standard. Performance in the EPA will determine the apprenticeship grade of fail, pass or distinction.

Figure 1. End Point Assessment flow diagram

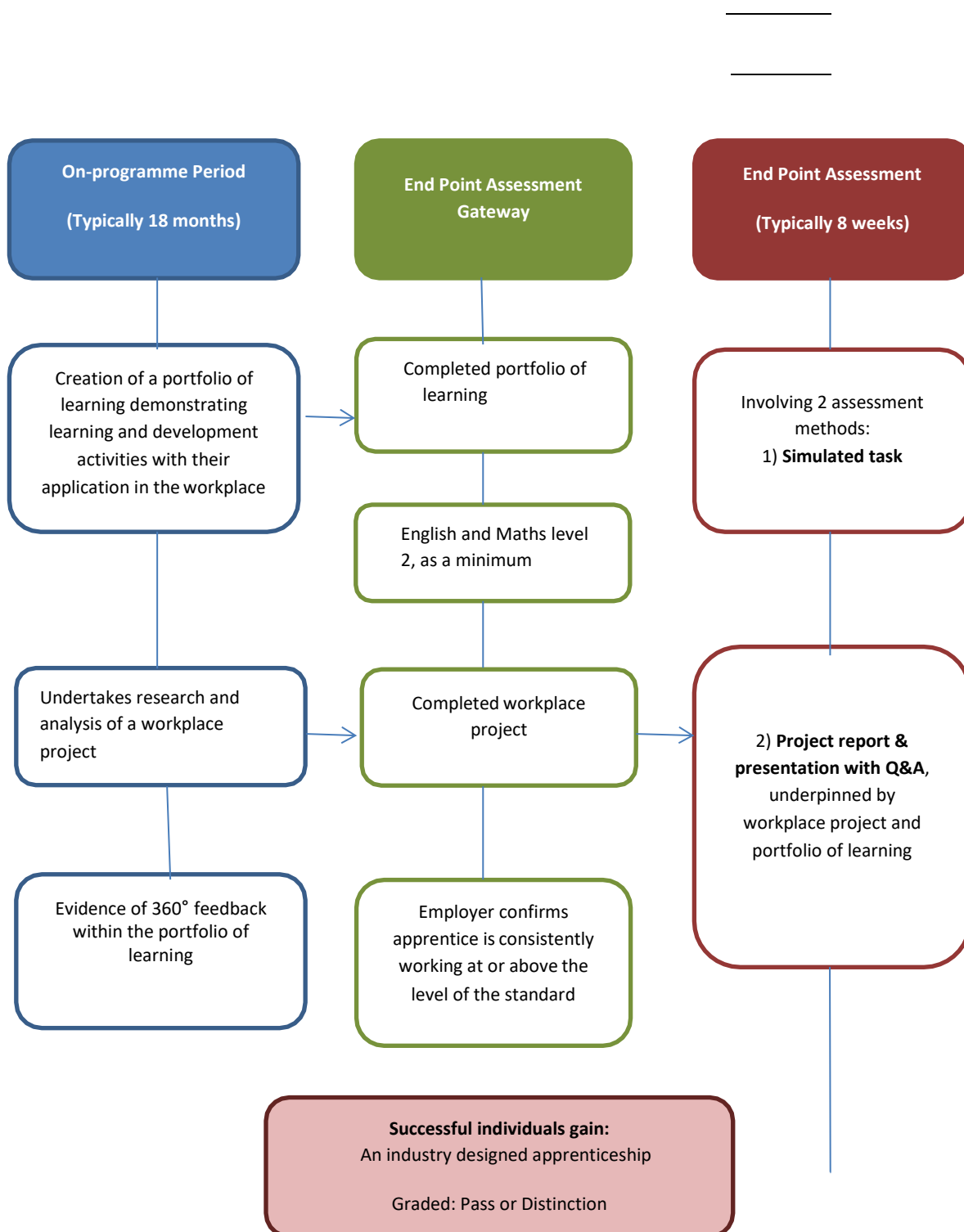


Table 1. End Point Assessment Methods Overview

Assessment method	Area assessed	Assessed by	Grading
1. Simulated task. This incorporates a short written report and presentation, both created in timed conditions, followed by questions	KSBs – as shown in Annex 1	End Point Assessment Organisation	Fail/ Pass/ Distinction
2. Project report & presentation, with questions and answers, underpinned by workplace project and portfolio of learning. Involves completion of on a formal detailed structured report of the on-programme workplace project, presentation on the workplace project, followed by questions on the report/presentation and other areas of the standard not covered by the workplace project	KSBs - as shown in Annex 1	End Point Assessment Organisation	Fail/ Pass/ Distinction

1. End Point Assessment Gateway

EPA should only start once the employer is satisfied that the gateway requirements have been met and that the apprentice is consistently working at, or above, the level set out in the standard in a way that can be evidenced to an EPAO. Employers should also seek advice from the apprentice's training provider(s) where appropriate.

Gateway requirements:

- English and mathematics level 2, as a minimum.
- Portfolio of learning, compiled during the on-programme period, with evidence demonstrating the KSBs.

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

Evidence can be in the form of reports, minutes, emails, stakeholder comments, peer reviews, performance reviews, presentations etc. This list is not exhaustive. The portfolio of learning must have a minimum of one piece of evidence that demonstrates each KSB. It must contain evidence of 360° feedback. Evidence must be holistically mapped against the KSBs with clear explanations of how the evidence covers each KSB. It will typically contain 10-12 discrete pieces of evidence.

The contents of the portfolio are not directly assessed.

- Completion of the workplace project based on two of the following areas of the standard; Finance, Procurement, Human Resources, Managing Support Services, Marketing and Infrastructure.

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

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.

The workplace project should be part of the apprentice's normal work duties and as such will be agreed between the employer and EPAO.

2. End Point Assessment

The EPA will typically be completed within an 8 week period after the apprentice has passed the EPA gateway.

What will be assessed

The KSBs required of a School Business Professional, as set out in the standard, will be assessed during the EPA. The KSBs to be assessed by each assessment method are shown in Annex 1.

How will it be assessed Apprentices must complete a project report based on their workplace project. The project should be suitably anonymised ensuring that all sensitive school based information is removed. The project should then be submitted to their independent assessor by an agreed date, representing week 2 of the EPA period. Following this date an EPA test day(s) will be arranged on which the apprentice will complete the 2 EPA assessment methods.

It is anticipated that apprentices will complete both assessment methods on the same day, however this is not a requirement, allowing EPAOs flexibility and efficiency in scheduling.

Requirements for the 2 assessment methods are detailed below.

1. **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)

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.

Apprentices will be given one and a half hours to complete a written task in the form of a report to the governors. EPAOs must prepare a bank of tasks, each based on the specified areas of the standard as shown in Annex 1. These tasks should mirror the type of reports that apprentices in the school business professional role will be expected to produce for governors.. EPAOs must develop 'task banks' of sufficient size to prevent predictability and review them, and the tasks they contain, regularly to ensure they are fit for purpose. Tasks will be allocated to apprentices at random. Further details of the simulated task may be found at Annex 2.

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. 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 Annex 2.

2. Project Report & Presentation with Questions & Answers (Report submitted by week 2), 10 – 12 minutes for presentation and 30 - 32 minutes for questions)

Apprentices must prepare a report and presentation during the EPA period on their workplace project which must cover two areas of the standard; Finance, Procurement, Human Resources, Managing Support Services, Marketing and Infrastructure (see gateway requirements). The remaining areas will be assessed during the questioning session following the presentation. Apprentices must submit their report to their independent assessor by the end of week 2 of their EPA period.

Report requirements: The apprentice will complete a formal report based on their workplace project completed prior to the EPA gateway. Both the project and the project report must be verified as the apprentice's own work along with confirmation that the project report was started and completed post-gateway. Verification must be provided by the employer that the project was undertaken by the apprentice and that the project report was written by the apprentice. This should include an executive summary, methodology, review of findings and next steps. The report may include evidence from their workplace 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 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 independent assessor and will be dependent on the evidence presented during the presentation and the project report as well as the portfolio of learning. A sample template is included as Annex 2. The evidence from the project report, presentation and questioning will be assessed holistically, using the grading criteria in Annex 3.

Apprentices must submit their portfolio of learning to their independent assessor by an agreed date, representing week 2 of the EPA period. Independent assessors must review the portfolio of learning prior to the Q & A session. They must prepare areas for questioning following the review of the apprentice's portfolio.

Practical requirements for the EPA:

- The apprentice must receive appropriate notice of their EPA test day(s) (a minimum of 10 working days' notice after they have submitted their workplace project report and portfolio of learning.)
- Apprentices may use PowerPoint and presentation aides, e.g. handouts, as they see fit for the presentation and questioning; technical requirements must be agreed with the EPAO in advance
- The EPA may be face-to-face with the independent assessor or via live media. EPAOs must ensure appropriate methods to prevent misrepresentation are in place should an online option be used, for instance, confirming the apprentice's identity through scrutiny of an appropriate piece of photo identification
- The assessment activities that take place during the EPA test day(s) must take place in a suitably controlled environment, i.e. quiet space, free from distraction and influence. This may be at the apprentice's employer's premises or other suitable venues
- EPA evidence must be recorded by the independent assessor (using written, audio or video recording), and a copy of the report of any presentation material must be retained for quality assurance purposes

Independent Assessors

EPA must be undertaken by an independent assessor appointed by an EPAO. EPAOs approved to offer EPA for this apprenticeship are shown on the Register of End Point Assessment Organisations (RoEPAOs).

EPAOs are responsible for appointing appropriately qualified independent assessors.

Independent assessors must:

- Be independent of the apprentice, their employer and training provider, i.e. there must be no conflict of interest
- Have 5-years' experience of working in leadership and management in an educational organisational setting *and/or* hold a leadership and management qualification, at a minimum of level 5 *and/or* a qualification in School Business Management, at a minimum of a Level 5 (or equivalent)
- Hold a recognised assessment qualification or have been trained in assessment practice by their EPAO

It is also desirable but not essential that independent assessors have membership of a professional institute or association appropriate to the level and subject area of the qualification.

EPAOs must also appoint invigilators for the simulated task short written report. There is no specific qualification or experience requirements for invigilators. However, they must be independent of the apprentice, their employer and training provider i.e. there must be no conflict of interest.

3. End Point Assessment – Grading

Independent assessors will assess and grade each assessment activity separately and combine the results to determine the EPA and apprenticeship grade.

Each assessment method will be graded fail, pass or distinction using the grading criteria in Annex 3. The distinction criteria builds on the pass criteria.

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

To achieve a distinction, apprentices must achieve a distinction in both assessment methods.

There are no caps to grading.

Annex 4 provides details of the grading combinations.

Independent assessors' decisions will be subject to moderation – see internal quality assurance section. Results must not be confirmed with the apprentice until after moderation.

Re-sits/Re-takes

Apprentices who fail one or more of the assessment methods are allowed to re-sit/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 the knowledge and skills that were found to be lacking at the EPA. The employer should support the apprentice with the further learning required.

Apprentices who pass the EPA cannot re-sit/re-take it simply to achieve a higher grade unless the retake is due to extenuating circumstances.

4. Professional Body Recognition

On successful completion, apprentices may choose to register as members with the Institute of School Business Leadership (ISBL), formerly operating as the National Association of School Business Management (NASBM).

5. Quality Assurance - Internal

EPAOs will be responsible for internal quality assurance of the EPA process. To ensure that assessments are run correctly (in relation to running, marking, standardising and reporting outcomes) they must:

- Uphold the rigour of the SBP Level 4 apprenticeship standard
- Provide training to independent assessors in relation to systems and process
- Appoint independent assessors in line with the requirements detailed above
- Appoint invigilators in line with the requirements detailed above

- Appoint quality assurance personnel to complete moderation, qualified in quality assurance practice
- Undertake moderation of independent assessors' work; with a minimum of 10% of each independent assessors' assessments sampled, rising where there are potential standardisation issues around consistency
- Hold standardisation meetings with independent assessors to provide updates and share good practice at least twice a year
- Produce assessment tools and materials to operate the assessment methods in line with good practice, i.e. bank of written tasks, recording documentation and sample questions
- Operate a complaints and appeals process
- Seek feedback from employers and training providers as to satisfaction with the service provided, to be used to improve the service provided
- Meet any requirements set in relation to external quality assurance

They will also be responsible for undertaking any reporting requirements and provision of information relating to performance and outcomes. They must also report on any concerns identified as to the quality of any on-programme training or assessment practices.

6. Quality Assurance – External

External Quality Assurance (EQA) of the organisations that provide the EPA will detailed on the Institute for Apprenticeships and Technical Education website.

7. Implementation

Affordability

The approach presented offers an affordable and scalable solution to EPA for this apprenticeship. The approach is robust and will ensure the best use of management time, with an EPA that delivers an effective synoptic assessment at a reasonable cost, and through a delivery model which minimises time and impact on the apprentice and employer.

The EPA will be delivered through a mixture of assessment methods, and where possible online solutions will be encouraged e.g. online portfolio submissions, use of online media for the presentation and questioning and professional discussion. For face-to-face sessions EPAOs should seek to use employers' premises to be able to respond across a range of geographical locations at reduced cost. This will ensure that the independent assessor time is maximised, and that employer and apprentices have easy access to the EPA with little time spent on travel and associated costs.

The cost of the EPA represents no more than 15% of the apprenticeship funding band of £6,000.

Annexes

Annex 1: Knowledge, Skills and Behaviours to be assessed by each assessment method

Knowledge	What is required for occupational competence	Assessment Method
Finance	<p>Understands the range of educational funding streams available which are applicable to their educational setting.</p> <p>Has a working knowledge of accounting practices and understands how to apply business principles to the optimum use of funding to support learning outcomes.</p> <p>Understands school compliance issues.</p> <p>Recognises business efficiency and knows the range of data required to inform school business decisions.</p>	Project report & presentation, with questions and answers
Procurement	<p>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.</p>	Project report & presentation, with questions and answers
Human Resources	<p>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.</p>	Project report & presentation, with questions and answers
Managing Support Services	<p>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.</p>	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 relevant legislation that schools must comply with, such as Health & Safety, Freedom of Information, Employment and Data Protection policies.	Project report & presentation, with questions and answers

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>	Project report & presentation, with questions and answers

Skills	What is required for occupational competence	Assessment Method
	Produces reports that present information and data, using a range of interpretation and analytical processes.	
Project Management	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.	Project report & presentation, with questions and answers
Change Management	Embraces change in a school and influence others in a positive manner. Works constructively within a team environment.	Project report & presentation, with questions and answers
Communication and Relationship Building	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.	Simulated task
Strategic Management	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.	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

Skills	What is required for occupational competence	Assessment Method
		<p>questions and answers</p> <p>Simulated task</p>
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

Annex 2: Template

Assessment Task 1: Simulated task, based on governance and risk areas of the standard.

Apprentices will be given a written task to complete in the form of a report to Governors based on one of the key areas of the Standard, eg finance, HR, Marketing or Procurement. Apprentices must not be given an area of the Standard that they have covered in their workplace report. They will not be provided with details of the area of the standard that they are required to write a report until the day of the EPA activity when they will be given 1.5 hours to read the requirement and prepare the report. It is expected that this report will be prepared electronically and that apprentices may use the internet for reference materials. The governor's report will be prepared under examination conditions with an invigilator present.

There is no limit to the word count for the report, apprentices may write as little or as much as they consider appropriate in the time available. Upon completion of the report the independent assessor should be given 15 minutes to read the report prior to the apprentice presenting the report to the assessor orally as if the independent assessor was a governor in an educational setting.

The oral report should take 10 mins (+/- 1 minute) followed by clarification questions from the independent assessor for 10-12 minutes.

Assessment Task 2: Project Report & Presentation with Questions & Answers

Upon completion of the Gateway, apprentices will be given two weeks to complete a formal written report on their workplace project(s) which cover two areas of the Standard. The report should include an executive summary, methodology, review of findings and next steps. 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.

The apprentice will prepare a presentation on their workplace project and report after the Gateway and will present this during the EPA day to the independent assessor. The presentation should last between 10-12 minutes, followed by 10 minutes of questions from the independent assessor. Questions should relate directly to the two area of the Standard that the workplace project was based on but may also include questions about the following areas: project management, change management, communication and relationship building, decision maker.

The apprentice will also be required to submit their portfolio of evidence to the independent assessor by week 2 post Gateway. Independent assessors must review the portfolio of learning

prior to the Q & A session. They must prepare to discuss the key areas of the

Standard that were not part of the workplace project or the report to governors'. Areas that should be covered include Finance, Procurement, Human Resources, Managing Support Services, Marketing This questioning session should be 5 minutes per area of the Standard to be assessed

Annex 3: Grading Criteria

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)
Procurement Knowledge	The Apprentice will: Have 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.	No evidence or partial evidence	The Apprentice can: Assess the importance of achieving value for money and be able to report on this to the governing board Use an example to explain how procurement law affects how they purchase items for the school and what the complexities of this are . Explains how to manage collaborative processes with other schools to share good practices and secure financial efficiencies.	Pass criteria plus: 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

<p>Governance & Risk</p> <p>Knowledge</p>	<p>The Apprentice will:</p> <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>Has appropriate knowledge enabling compliance with charitable status and education law.</p> <p>Understand the impact of, and how to implement, safeguarding policy in a school environment</p>	<p>No evidence or partial evidence</p>	<p>The Apprentice can:</p> <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>Pass criteria plus:</p> <p>At least two types of relevant source information has been used</p> <p>The key concepts and techniques related to the management of risk in schools are identified</p>
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Communication and Relationship Building Skills	The Apprentice will: 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.	No evidence or partial evidence	The Apprentice can: Demonstrate clarity of thinking The communication is appropriate for familiar and unfamiliar audiences and appropriate media have been used	Pass criteria plus: Communicates a deep knowledge and understanding of concepts and techniques related to Governance and Risk
Decision Maker Behavior	The Apprentice will: Apply a confident approach to decision-making and prioritisation, thus gaining the confidence of others.	No evidence or partial evidence	The Apprentice can: Demonstrates a confident approach to decision- making and prioritisation thus gaining confidence of others	Pass criteria plus: Evidence that they have promoted the importance of using financial information in effective decision making Compare different specifications for a proposed product/service and make a recommendation for purchase

2. Project Report & Presentation with Questions & Answers

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
Procurement Knowledge	The Apprentice will: 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	The Apprentice can: 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	Pass criteria plus: 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	The Apprentice will: 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	The Apprentice can: Define a school's stakeholder groups Evaluate marketing activities undertaken by the school Explain the importance of reputational management strategy	Pass criteria plus: 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

			<p>Describe key health & safety regulations that must be adhered to when managing a school's public events</p> <p>Identify income generation opportunities applicable to a school</p> <p>Evaluate potential risks associated with income generation activities in a school</p>	
Project Management Skills	<p>The Apprentice will:</p> <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.</p> <p>Uses multiple IT packages and specialised schools MIS (management information systems) platforms.</p> <p>Prepares and collates data for reporting purposes.</p>	<p>No evidence or partial evidence</p>	<p>The Apprentice can show:</p> <p>How they use IT packages to provide financial and performance data to support the procurement or marketing processes</p> <p>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.</p>	<p>Pass criteria plus:</p> <p>Must assess the importance of achieving value for money</p> <p>Must assess the process used by the school with at least two efficiency opportunities highlighted</p>

Knowledge & Skills	What is required	Fail	Pass	Distinction (in addition to pass criteria, apprentice demonstrates all of the following criteria) Pass criteria plus:
Finance Knowledge	The Apprentice will: Understand the range of educational funding streams available which are applicable to their educational setting. Understand school compliance issues. Recognise business efficiency and knows the range of data required to inform school business decisions.	No evidence or partial evidence	The Apprentice can: Describe national school budget procedures Explain the current education funding streams for schools and where the latest funding information can be found 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	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 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

			Evaluate key concepts relating to financial systems and controls, and how they are implemented in a school	
Financial and Operational Management Skills	<p>The Apprentice will:</p> <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>	No evidence or partial evidence	<p>The Apprentice can:</p> <p>Assess the information used to make financial decisions and how it's used to make decisions in a school</p> <p>Co-ordinate the planning and preparation of a budget</p> <p>Provide financial and performance data to senior managers to support performance monitoring against financial objectives</p> <p>Assess risks to a school's financial plans, identifying how these risks can be mitigated</p> <p>Uses appropriate accounting methods to report financial information</p>	<p>Pass criteria plus:</p> <p>Must provide at least two types of financial or performance data in a format that can be used to support performance monitoring</p> <p>Must include an explanation of how to ensure probity</p>

Human Resources Knowledge	The Apprentice will: 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	The Apprentice can: 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	Pass criteria plus: 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	The Apprentice will: Understand the impact of educational policies at an operation level 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 Know how to manage the DfE pupil and workforce census and their impact on the school	No evidence or partial evidence	The Apprentice can: 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 Review performance data to identify inconsistencies between functions/departments Explain the data available to monitor and review in order to ensure operational effectiveness across all departments Produce plans to address under performance identified across functions/departments	Pass criteria plus: must identify at least three different sources of statutory and legislative requirements that impact school management Must assess the potential impact of at least two policies and one legislative change on schools. The assessment must be objective and not just reflect the learner opinion

Infrastructure Knowledge	The Apprentice will: Understand the significance of physical facilities and digital processes in an educational setting Be aware of the optimum deployment of resources targeted to raise pupil attainment Know the relevant legislation that schools must comply with, e.g. Health & Safety, Freedom of Information, Employment & Data protection policies etc.	No evidence or partial evidence	The Apprentice can: 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 Describe the legislative and regulatory factors influencing the use of space in schools Assess the school's long term capital plans and requirements Review the school's long term space requirements and how these will be met by current plans for school space Produce a cost benefit analysis to identify facilities that meet service needs and provide value for money	Pass criteria plus: Must show they understand the term asset management when used in a school context and must include at least two key purposes Must describe at least two legislative and regulatory factors influencing the use of space in schools Must be an assessment of the extent to which the school procurement strategy for spending on capital supports teaching and learning activities
Strategic Management Skills	The Apprentice will: Manage support services within an entire school Provide guidance to colleagues on the most appropriate use of school funding Effectively manage small teams to drive efficiencies	No evidence or partial evidence	The Apprentice can: Their awareness of the effect different leadership styles has on individuals, teams and schools How they have identified barrier to prevent a team working effectively and how they have overcome these How they have led a team to achieve their own and others' objectives The information they have provided to make financial decisions within their school	Pass criteria plus: Must describe how training and development improves performance of both self and team Must show how they have supervised a team and achieved specific objectives

Behaviours	Fail	Pass	Distinction (in addition to pass criteria)
Change Catalyst	No evidence	<p>The Apprentice can:</p> <p>Keep up to date with educational policy development</p> <p>Embraces change in a school and influence others in a positive manner.</p> <p>Works constructively within a team environment</p> <p>Self-motivated and supportive of others in working through change</p>	<p>Pass criteria plus:</p> <p>Evidence of supporting the development of a team and influencing others in a positive manner</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>
Skilled Negotiator	No evidence	<p>The Apprentice can:</p> <p>Consults and seeks the views of others whilst being open, approachable and building trust</p> <p>Values diversity both within and outside the school</p>	<p>Pass criteria plus:</p> <p>Evidences that they have assessed communication needs for both team and self and implemented changes</p> <p>Must show how they have raised awareness of professional development within a school</p>
Collaborative	No evidence	<p>The Apprentice can:</p> <p>Behaves in a collaborative way with other internal and external stakeholders</p> <p>Promotes a team spirit</p> <p>Actively demonstrates professional competence in all settings and situations</p>	<p>Pass criteria plus:</p> <p>Must provide evidence of incorporating at least two examples of other peoples' ideas into decision making</p> <p>Evidence their support of the development of a team</p>
Challenger	No evidence	<p>The Apprentice can:</p> <p>Is willing to ask difficult questions whilst demonstrating an ethical, fair and consistent approach</p>	<p>Pass criteria plus:</p> <p>Show how they have produced a plan to address inconsistencies across departments and how they have started to implement the plan</p>

		Offers a business perspective and supports discussion and debate with professional knowledge and evidence	Identify areas where financial controls may be inadequate and evidence that they have made recommendations to rectify these problems
Resilient	No evidence	The Apprentice can: Has the ability to adapt to different, changing and challenging situations whilst promoting the highest professional standards	Pass criteria plus: 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

ANNEX 4**Level 4 SBP Final Grade Bands – Examples**

Written report	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
FAIL	FAIL	FAIL