**End-Point Assessment Organisation**

School Business Professional L4

Assessor Application

# The SBP L4 Apprenticeship Units

This assessor application document is relevant to the following units that are integral to the delivery of the SBP L4 Apprenticeship. Each unit will have been studied by apprentices coming to end-point assessment.

* Leading Support Services in a School.

This unit aims to develop the learners’ knowledge and skills relating to leadership and development in a school, managing change and policy and legislation that affects schools. It involves understanding leadership and development in a school and equips learners with the knowledge and skills required to lead, develop and co-ordinate support services within a school or trust.

* Finance in a School.

This unit aims to equip learners with the knowledge and skills needed to support finance decisions in a school, contribute to budget planning and delivery and how to manage financial control systems. It develops an understanding of school budget planning and delivery. The purpose of this unit is to equip learners with the knowledge and skills required to support the management of finances in a school.

* Procurement in a School.

This unit covers content relating to procurement strategy, managing the tendering process, and supporting contractor and supplier management. The purpose of this unit is to equip learners with the knowledge and skills required to support the tendering process to ensure value for money and oversee the management of contractors and suppliers in a school environment.

* Human Resource Management in a School.

The purpose of this unit is to equip learners with the knowledge and skills required to manage human resources within a school environment and ensure regulatory and legal compliance. The HR unit includes: Understanding how employment and discrimination law impact school operations; reviewing school staffing structures; recruitment and selection processes, plus other sections on reward and recognition, etc.

* Marketing in a School.

This unit aims to equip learners with the knowledge and skills needed to support the planning, management and review of a range of marketing activities in a school. The unit includes a variety of key marketing topics including the development of skills such as the planning and evaluation of school marketing activities. It will also enable the participant to be able to identify and plan income generating activity in a school and understand the importance of managing a school’s reputation.

* School Infrastructure Management.

The purpose of this unit is to equip learners with the knowledge and skills required to contribute to the planning, management and review of asset and capital activities in a school. Learners will develop an understanding of asset management in a school; be able to review and plan school asset management activities; be able to support capital management activities, and facilities management, in a school. Other objectives related to infrastructure management are included as well.

# The assessment methodology

The End-Point Assessment (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. 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 and must be read as part of the application.

# Assessor requirements

EPA must be undertaken by an independent assessor appointed by an End-Point Assessment Organisation (EPAO). 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.

IMPORTANT: Please note that all assessors selected by BPN must be able to commit to a minimum of 11 days per year for assessment activity and training

# Purpose of the application

**Completion of this application document will support decision around the:**

* Selection of assessors
* Deployment of assessors
* Ongoing training and support of assessors

# SBP L4 EPA Assessor Application

## Competency Matrix

Each apprenticeship standard sets out very clear requirements for occupational competency that we must ensure our assessment team meet. Please provide detailed information for how you meet the requirements of the standards you are applying to assess.

This is a key requirement of your application.

|  |  |
| --- | --- |
| Name |  |
| Date |  |

|  |  |
| --- | --- |
| Assessor qualifications and dates achieved (or dates expected if working towards) |  |

|  |  |  |
| --- | --- | --- |
| Standard | Occupational competency requirements | Your response:  (*Consider including information such as: details of environments you have worked in, currency of your practical competence, dates and timeframes of experience, how you remain current, details of any professional registrations or qualifications you hold)* |
| School Business Professional L4 | 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.  (If you do not meet this competency on application, BPN will provide relevant training to selected assessor candidates |  |
| 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. |  |

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| Notes: (Internal use only) |  |

*Please complete self-evaluation of Annex 1 below.*

# Self-evaluation of Annex 1

With reference to the content of Annex 1 (shown below), please enter an X in the right-hand columns to indicate **your** current knowledge and understanding of each of the following:

| **Knowledge** | **Limited** | **Fair** | **Good** | **Excellent** |
| --- | --- | --- | --- | --- |
| Finance |  |  |  |  |
| Procurement |  |  |  |  |
| Human Resources |  |  |  |  |
| Managing Support Services |  |  |  |  |
| Governance and Risk |  |  |  |  |
| Marketing |  |  |  |  |
| Infrastructure |  |  |  |  |
| Ethical Standards |  |  |  |  |
| **Skills** | **Limited** | **Fair** | **Good** | **Excellent** |
| Financial and Operational Management |  |  |  |  |
| Project Management |  |  |  |  |
| Change Management |  |  |  |  |
| Communication and Relationship Building |  |  |  |  |
| Strategic Management |  |  |  |  |
| **Behaviours** | **Limited** | **Fair** | **Good** | **Excellent** |
| Change Catalyst |  |  |  |  |
| Decision Maker |  |  |  |  |
| Skilled Negotiator |  |  |  |  |
| Collaborative |  |  |  |  |
| Resilient |  |  |  |  |

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

|  |  |  |
| --- | --- | --- |
| **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 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 |
| Ethical Standards | Understands and demonstrates the highest standards of personal and professional conduct. Understands, and applies, statutory regulations and provisions. | Project report & presentation, with questions and answers  Simulated task |

|  |  |  |
| --- | --- | --- |
| **Skills** | **What is required for occupational competence** | **Assessment Method** |
| Financial and Operational Management | 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. | Project report & presentation, with questions and answers |
| 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  Simulated task |
| 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. | Project report & presentation, with questions and answers  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 |

|  |  |  |
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| **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  Simulated task |
| 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  Simulated task |