



Best  
Practice  
Network



Apprenticeships

# Level 4 End-Point Assessment for **ST0575 School Business Professional** Specification



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# Introduction

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

Welcome to the Best Practice Network (BPN) specification document for the School Business Professional Level 4 Apprenticeship Standard, the purpose of which is to provide information to Users about the End Point Assessment (EPA).

BPN is a leading national provider of CPD and assessment, specialising in the education sector. Our programmes include National Professional Qualifications in school leadership and subject specialisms, the Early Career Framework for Early Career Teachers, Initial Teacher Training, Early Years Initial Teacher Training, and the Diploma for School Business Managers. We provide 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.

## 1. Occupation Profile

School Business Professionals (SBPs) perform a role which is unique to schools, administering and managing the financial, site and support services within the school context. They provide essential support to school leadership teams, implementing their financial and business decisions.

SBPs may work in any school phase (primary, secondary, special) and in different school structures: single academy trusts, multi academy trusts (MATs), local authority maintained schools and federations, etc. Consequently, they can work in very different settings with varying numbers of people that they report to including the headteacher or School Business Director (SBD). Within this context, SBPs have a shared number of roles which shape their day-to-day activity to make this a homogeneous role in schools.

SBPs interact with all school stakeholders regularly to advise on and manage school business practices effectively. This requires them to understand educational issues as well as business management.

Their work is performed in the context of ensuring that public funds are used effectively. They must adhere to the principles of making the best use of school resources to enable all students to achieve their potential and to meet the aim of increasing social mobility for children and young people. SBPs must also understand that their role is of vital importance in relation to school governance and compliance. They must have a good understanding of educational policies and be able to implement change.

There is a range of job titles that this occupational profile relates to including a School Business Manager, HR Manager, Finance Manager, Office Manager, School Administrator, Business Support Officer, Bursar, etc.

## 2. Qualification objective

The objective of the qualification is to equip school business professionals with the knowledge, skills and behaviours required to be occupationally competent in the SBP role.

## 3. Requirements: Knowledge, skills and behaviours (KSBs) and grading criteria

The knowledge, skills and behaviours required for occupational competence, and the relevant assessment method are summarised in Appendix A below.

## 4. Gateway requirements

After the On-programme Period, typically 18 months, the apprentice will need to provide evidence at Gateway that they:

- Have English and mathematics at level 2, as a minimum
- Have completed a workplace project based on two knowledge areas
- Have completed a portfolio of learning, compiled during the on-programme period, with evidence demonstrating the KSBs
- Are working consistently at or above the level of the Standard, confirmed by employer.

## 5. End-Point Assessment

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

As an EPAO, BPN tests 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 Annex 1 in the Assessment Plan. Apprentices signed up with BPN will have access to resources that include a coded version of the grading criteria to support preparation for assessment.

BPN independent assessors are selected for their sector expertise and their assessment experience. Our team 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.

## 6. The simulated task

BPN will provide each apprentice undertaking an end-point assessment, through their training provider, examples of a brief detailing the simulated task requirements. 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, including:

- 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 has prepared a bank of tasks, each based on the specified areas of the standard. These tasks mirror the type of reports that apprentices in the school business professional role will be expected to produce for governors. Tasks are allocated to apprentices at random.
- 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 detailed within the Assessment Plan.
- 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.

## 7. The workplace project report, presentation, questions & answers

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

- Apprentices will prepare a report and presentation during the EPA period on their workplace project that links to at least two knowledge areas of the standard.
- 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.'
- BPN provide guidance, a template and an exemplar to support submission of the report.
- Our BPN independent assessor assesses the workplace project report prior to preparing questions for the presentation and question & answer session.
- Our BPN independent assessor reviews the portfolio of learning prior to the Q & A session. However, the portfolio of learning is **not** 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 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.
- 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 grading criteria.
- BPN will agree workplace project proposals before projects are initiated.

## 8. Where the apprentice will be assessed

BPN Assessments 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.

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## Appendix A – KSBs and grading criteria by assessment method

<b>Assessment Method - Project report &amp; presentation, with questions and answers</b>	
<b>Knowledge</b>	<b>What is required for occupational competence</b>
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>
	<p><b>Grading criteria - Pass and Distinction</b></p>
	<p>Describe national school budget procedures.</p> <p>Explain the current education funding streams for schools and where the latest funding information can be found.</p> <p>Describe the main and regular financial decisions that are made in schools.</p> <p>Explain how costing information is used when making financial decisions.</p> <p>Explain the importance of considering different views when making decisions about service delivery.</p> <p>Describe how the budget planning cycle links to the school's development plan.</p> <p>Explain school specific financial policies that must be adhered to, including those in place to ensure probity.</p> <p>Explain how to administer finance operations in accordance with school financial procedures.</p> <p>Evaluate key concepts relating to financial systems and controls, and how they are implemented in a school.</p> <p><i>Must identify the key information which can affect financial decisions in a school.</i></p> <p><i>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.</i></p> <p><i>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.</i></p>
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>
	<p><b>Grading criteria - Pass and Distinction</b></p>
	<p>Explain the concepts of economies of scale through group purchasing.</p> <p>Compare the different potential purchasing routes for schools.</p> <p>Describe the benefits of using national and local benchmarking data in schools.</p> <p><i>Must include the three principles of fair competition, transparency and probity when spending public monies and reference appropriate definitions.</i></p> <p><i>Must compare at least two different models for joint working arrangements in a school.</i></p>
Human Resources	<p>Understands the complexities of teaching and support staff contracts, terms &amp; 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 advice.</p>
	<p><b>Grading criteria - Pass and Distinction</b></p>
	<p>Assess the impact that relevant and current employment and discrimination law has on HR activities in a school.</p> <p>Describe how a school can minimise employment and discrimination related risks.</p> <p>Describe the key components of relevant employment law and policy relating to staff recruitment and exit.</p> <p>Describe the process of workforce planning in a school including key considerations</p> <p>Explain the importance of safeguarding processes in school recruitment.</p> <p><i>Must use at least two sources of staff benchmark data to identify potential improvements and gaps.</i></p> <p><i>Must assess at least three recruitment options which must lead to a judgement on their suitability to a school's identified recruitment demand.</i></p>

	<i>Must analyse at least two continuous professional development opportunities that exist within a school.</i>
Managing Support Services	<p>Understands 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 &amp; presentation, with questions and answers</p> <p><b>Grading criteria - Pass and Distinction</b></p> <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.  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.  <i>Must identify at least three different sources of statutory and legislative requirements that impact school management.</i>  <i>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.</i></p>
Marketing	<p>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.</p> <p><b>Grading criteria - Pass and Distinction</b></p> <p>Define a school's stakeholder groups.  Evaluate marketing activities undertaken by the school.  Explain the importance of reputational management strategy.  Describe key health &amp; 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.  <i>Must demonstrate how they have advised and influenced their schools marketing and communication plan.</i>  <i>Must include a descriptive overview of UK marketing legislation and how this applies to schools.</i></p>
Infrastructure	<p>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 &amp; Safety, Freedom of Information, Employment and Data Protection policies.</p> <p><b>Grading criteria - Pass and Distinction</b></p> <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.  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.  <i>Must show they understand the term asset management when used in a school context and must include at least two key purposes.</i>  <i>Must describe at least two legislative and regulatory factors influencing the use of space in schools.</i>  <i>Must be an assessment of the extent to which the school procurement strategy for spending on capital supports teaching and learning activities.</i></p>
<b>Skills</b>	<b>What is required for occupational competence</b>
Financial and Operational Management	<p>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.</p>



	<p>Produces reports that present information and data, using a range of interpretation and analytical processes.</p> <p><b>Grading criteria - Pass and Distinction</b></p> <p>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. <i>Must provide at least two types of financial or performance data in a format that can be used to support performance monitoring.</i> <i>Must include an explanation of how to ensure probity.</i></p>
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> <p><b>Grading criteria - Pass and Distinction</b></p> <p>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. <i>Must assess the importance of achieving value for money.</i> <i>Must assess the process used by the school with at least two efficiency opportunities highlighted.</i></p>
Change Management	<p>Embraces change in a school and influence others in a positive manner. Works constructively within a team environment.</p> <p><b>Grading criteria - Pass and Distinction</b></p> <p>None.</p>
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> <p><b>Grading criteria - Pass and Distinction</b></p> <p>Show their awareness of the effect different leadership styles has on individuals, teams and schools. Show how they have identified barrier to prevent a team working effectively and how they have overcome these. Show how they have led a team to achieve their own and others' objectives. Show the information they have provided to make financial decisions within their school. <i>Must describe how training and development improves performance of both self and team.</i> <i>Must show how they have supervised a team and achieved specific objectives.</i></p>
<b>Behaviours</b>	<b>What is required for occupational competence</b>
Change Catalyst	<p>Keeps up to date with educational policy developments and embraces change. Self-motivated and supportive of others in working through change.</p> <p><b>Grading criteria - Pass and Distinction</b></p> <p>Keeps up to date with educational policy development. Embraces change. Works constructively within a team environment. <i>Evidence of supporting the development of a team.</i> <i>Must identify at least two barriers to change that can exist in a school and show how each of them could be overcome.</i></p>
Skilled Negotiator	<p>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.</p> <p><b>Grading criteria - Pass and Distinction</b></p> <p>Consults and seeks the views of others Values diversity both within and outside the school. <i>Evidences that they have assessed communication needs for both team and self and implemented changes.</i> <i>Must show how they have raised awareness of professional development within a school.</i></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.
	<b>Grading criteria - Pass and Distinction</b>
	Behaves in a collaborative way with other internal and external stakeholders. Promotes a team spirit. Actively demonstrates professional competence in all settings and situations. <i>Must provide evidence of incorporating at least two examples of other peoples' ideas into decision making.</i> <i>Evidence their support of the development of a team.</i>
Resilient	Has the ability to adapt to different, changing and challenging situations whilst promoting the highest professional standards.
	<b>Grading criteria - Pass and Distinction</b>
	Has the ability to adapt to different, changing and challenging situations whilst promoting the highest professional standards. <i>Seek feedback and review of own performance to inform development outside of formal performance reviews.</i> <i>Critically assess personal development needs and prepare a personal development plan in sufficient detail to show it can be implemented in a school environment.</i>
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.
	<b>Grading criteria - Pass and Distinction</b>
	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. <i>Show how they have produced a plan to address inconsistencies across departments.</i> <i>Identify areas where financial controls may be inadequate and evidence that they have made recommendations to rectify these problems.</i>

Assessment Method – Simulated task	
Knowledge	What is required for occupational competence
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.
	<b>Grading criteria - Pass and Distinction</b>
	Present the benefits of innovation to a governing body. Evaluate a range of innovation opportunities within a school. 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. <i>At least two types of relevant source information have been used.</i> <i>The key concepts and techniques related to the management of risk in schools are identified.</i>
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.
	<b>Grading criteria - Pass and Distinction</b>
	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. <i>Must include the three principles of fair competition, transparency and probity when spending public monies and reference appropriate definitions.</i> <i>Must compare at least two different models for joint working arrangements in a school.</i>

<b>Skills</b>	<b>What is required for occupational competence</b>
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.
	<b>Grading criteria - Pass and Distinction</b>
	Demonstrate clarity of thinking The communication is appropriate for familiar and unfamiliar audiences and appropriate media have been used <i>Communicates a deep knowledge and understanding of concepts and techniques related to Governance and Risk.</i>
<b>Behaviours</b>	<b>What is required for occupational competence</b>
Decision Maker	Demonstrates a confident approach to decision-making and prioritisation, thus gaining the confidence of others.
	<b>Grading criteria - Pass and Distinction</b>
	Demonstrates a confident approach to decision-making and prioritisation thus gaining the confidence of others. <i>Evidence that they have promoted the importance of using financial information in effective decision making.</i> <i>Compare different specifications for a proposed product/service and make a recommendation for purchase.</i>