



End-point assessment plan for Buying and Merchandising Assistant apprenticeship standard

Apprenticeship standard reference number	Level of this end point assessment (EPA)	Integrated
ST0683	4	No

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Introduction and overview

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

Full time apprentices will typically spend 18 months on-programme (before the gateway) working towards the occupational standard, with a minimum of 20% off-the-job training. All apprentices will spend a minimum of 12 months on-programme.

The EPA period should only start, and the EPA be arranged, once the employer is satisfied that the apprentice is consistently working at or above the level set out in the occupational standard, all of the pre-requisite gateway requirements for EPA have been met and that they can be evidenced to an EPAO.

All pre-requisites for EPA assessment methods must also be complete and available for the independent assessor as necessary.

For level 3 apprenticeships and above apprentices without English and mathematics at level 2 must achieve level 2 prior to taking their EPA.

The EPA must be completed within an EPA period lasting a maximum of 6 months, beginning when the apprentice has passed the EPA gateway.

The EPA consists of 2 discrete assessment methods.

The individual assessment methods will have the following grades:

Assessment method 1: Work Based Project including a Presentation with Questioning

- Pass
- Fail
- Distinction

Assessment method 2: Professional Discussion, underpinned by a portfolio of evidence

- Pass
- Fail
- Distinction

Performance in the EPA will determine the overall apprenticeship standard and grade of:

- Pass
- Fail
- Distinction

EPA summary table

On-programme (typically 18 months)	Training to develop the occupation standard's knowledge, skills and behaviours.
End-point Assessment Gateway	<ul style="list-style-type: none"> • Employer is satisfied the apprentice is consistently working at, or above, the level of the occupational standard. • Apprentices without level 2 English and maths will need to achieve this level prior to taking the End-Point Assessment. For those with an education, health and care plan or a legacy statement, the apprenticeship's English and maths minimum requirement is Entry Level 3. A British Sign Language (BSL) qualification is an alternative for those whose primary language is BSL. • The completion of the portfolio of evidence. The employer must also confirm to the EPAO that the content of the portfolio is the apprentices own work.
End Point Assessment (which would typically take 6 months)	<p>Assessment Method 1: Work Based Project including a Presentation with Questioning</p> <p>With the following grades:</p> <ul style="list-style-type: none"> · Pass · Fail · Distinction <p>Assessment Method 2: Professional Discussion, underpinned by a portfolio of evidence</p> <p>With the following grades:</p> <ul style="list-style-type: none"> · Pass · Fail · Distinction

Length of end-point assessment period:

The EPA must be completed within an EPA period lasting a maximum of 6 months, beginning when the apprentice has passed the EPA gateway.

The portfolio of evidence required for the EPA should be submitted no later than 2 weeks after the start of the EPA period.

If an EPA assessment method is failed, it should be retaken within the EPA period and in-line with the requirements set out in this assessment plan.

Order of assessment methods

The assessment methods can be delivered in any order.

Gateway

The EPA period should only start once the employer is satisfied that the apprentice is consistently working at or above the level set out in the occupational standard, that is to say they have achieved occupational competence. In making this decision, the employer may take advice from the apprentice's training provider(s), but the decision must ultimately be made solely by the employer.

In addition to the employer's confirmation that the apprentice is working at or above the level in the occupational standard, the apprentice must have completed the following gateway requirements prior to beginning EPA:

English and mathematics at level 2.

For those with an education, health and care plan or a legacy statement the apprenticeships English and mathematics minimum requirement is Entry Level 3 and British Sign Language qualification are an alternative to English qualifications for whom this is their primary language.

For Work Based Project including a Presentation with Questioning no specific requirements

For Professional Discussion, underpinned by a portfolio of evidence, the apprentice will be required to submit:

- The portfolio of evidence (submitted no later than 2 weeks after the start of the EPA period).
- The employer must also confirm to the EPAO that the content of the portfolio is the apprentices own work.

Assessment methods

Assessment Method 1: Work Based Project including a Presentation with Questioning (This Method has 2 components.)

Method 1 Component 1: Work Based Project

Overview

The project is compiled after the apprentice has gone through the Gateway process.

The work-based project should be designed to ensure that the apprentice's work meets the needs of the business, is relevant to their role and allows the relevant KSBs to be demonstrated for the EPA. Therefore the project's subject, title and scope will be agreed between the employer and the EPAO. The employer will ensure it has a real business application and the EPAO will ensure it meets the requirements of the EPA (including suitable coverage of the KSBs assignment to this assessment method). The EPAO must sign-off the project title to confirm its suitability prior to the project commencing. This will be completed during the first two weeks following the completed Gateway process.

The rationale for this assessment method is:

The work based project is the most valid method as it allows a practical demonstration of professional competence. The project will contribute to the employer's business and be part of the apprentices every day work, ensuring that they can demonstrate KSBs in practice.

Delivery

Apprentices will conduct a project in the form of an employment-based assignment.

The project is compiled after the apprentice has gone through the Gateway process. The apprentice will conduct their project and submit it to the EPAO after a maximum of 3 months of the EPA start date.

The employer will ensure the apprentice has sufficient time and the necessary resources, within this period, to plan and undertake the project.

Whilst completing the project, the apprentice should be subject to the supervision arrangements outlined below:

Normal workplace supervision and support.

The project should be in the form of a paper-based or electronic report.

- Product lifecycle
- Supply chain strategy
- Supplier strategy
- Sustainability
- Waste reduction
- Improving sales / profitability

As a minimum all projects must include:

A typical structure for the work-based project report should include:

- Introduction
- The scope of the project (including, objectives, key performance indicators and anticipated benefits)
- A project plan
- How the outcomes were achieved
- Research and findings including customer needs
- Project outcomes
- Recommendations and conclusions

The apprentice will be required to document their assumptions and to highlight the consequences of those assumptions, enabling them to demonstrate their understanding of commercial pressures, and the application of their thinking and problem-solving skills.

Input from the employer and EPAO will be limited to guidance in terms of project topic, scope, and recommended reading.

The project will have a maximum word limit of 3,000.

A tolerance of plus or minus 10% is allowed.

Appendices, references, diagrams etc. will **not** be included in this total.

The project must map, in an appendix, how it evidences the relevant KSBs for this assessment method.

The project will be conducted as set out here:

The work based project will be started after the EPA gateway decision and developed over a period of 3 months.

The work-based project will be assessed for evidence that the knowledge, skills and behaviours required of a Buying and Merchandising Assistant are inherent in the apprentice's practice and the content of the project must enable the following to be demonstrated:

- The approach to planning and completion of the project, including what has to be delivered on completion of the project
- The application of the knowledge and skills to meet the outcomes in the standard.
- The application of behaviours from the standard.
- Evidence of learning and of clear outcomes for the apprentice, their organisation and the customer.
- The work-based project should cover the project context, the apprentice's responsibilities, action taken by the apprentice (planning and execution) and results. The evidence provided must be attributable to the apprentice and the employer should validate this prior to its submission to the EPAO.
- The End-point Assessment Organisation will liaise with the employer and apprentice to agree a suitable project topic and title for the work-based project to be undertaken. This will be completed during the first two weeks following the completed Gateway process. The apprentice will scope out and provide a brief summary of what the project will cover and present a terms of reference of what will be undertaken by themselves and an initial plan for agreement by the employer, and independent assessor. The terms of reference and plan are not assessed components of the work-based project and EPA.

- For those learners with a special learning need such as dyslexia the independent assessor will ensure that reasonable adjustments are in place where necessary. Employers should ensure that the apprentice has the opportunity and time to complete their project during working hours.
- When the project is submitted, the employer and the apprentice should verify the submitted work is that of the apprentice.

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When the project is submitted, the employer and the apprentice should verify the submitted work is that of the apprentice.

Marking

The independent assessor will review and mark the project one month, as determined by the EPAO, and without extending the EPA unnecessarily. Similarly all quality control processes will also be conducted in a timely manner, as determined by the EPAO.

Required supporting material

EPAOs will produce the following material to support this assessment method:

- Outline of the assessment method's requirements
- Marking materials
- A guidance document for employers and apprentices on how the assessment will take place, including timescales.

Method 1 Component 2: Presentation of Work Based Project followed by question and answers

Overview

Apprentices will prepare and deliver a presentation that appropriately covers the KSBs assigned to this method of assessment.

The presentation will be based on the work based project and will cover the following:

A presentation with questions and answers will take place between the independent assessor and the apprentice. The presentation will be a summary of the work based project, and the independent assessor will use the project to prepare questions to ask following the presentation.

- The EPAO must schedule the presentation and questioning elements to take place within the 6 months of the apprentice successfully going through the gateway process. Following receipt of the Work based project, the EPAO will provide the apprentice with a minimum of 2 weeks' notice of the time, date and venue for their Presentation.
- The presentation and questioning elements must take place on a one-to-one basis between an independent assessor and the apprentice.
- The questioning should take place after the presentation.
- Two weeks prior to the presentation and questioning, the independent assessor must have reviewed the apprentice's work based project (and prepared questions for the questioning element). However, the questions may be modified to take account of the presentation evidence.

- Apprentices must include in their presentation an evaluation of their project. This should include factors such as, what went well, lessons learned for future project activity, and any specific recommendations.
- The presentation must take 30 minutes (+10% this will be at the discretion of the independent assessor in order to provide scope for an apprentice to demonstrate their full abilities), followed by 30 minutes (+ 10% again at the discretion of the independent assessor) questions and answers.
- Apprentices can use presentation aides i.e. power-point, video clips, flip chart, work products, notes.
- EPAOs must ensure any reasonable presentation requirements are in place e.g. power-point facilities.
- Following the presentation, the independent assessor must ask the apprentice a minimum of 6 open questions; including 3 questions from the question bank and and 3 that the independent assessor creates based on the review of the presentation. The independent assessor can ask additional follow up questions to seek clarification. Based on the review of the project report, the independent assessors must prepare 6 questions in advance of the presentation to be used as part of the Q&A session. The independent assessor will generate any follow up questions during the Q&A session. EPAOs must develop example questions and guidance documents to facilitate independent assessors to prepare their questions.
- It is recommended that EPAOs develop assessment tools in consultation with representative employers; where they do this, they must put measures in place to ensure question security.
- Questions must seek to assess KSBs not evidenced through the presentation and work-based project and/or depth of understanding to assess performance against the distinction criteria.
- Apprentices may refer to their work-based project, evidence contained within the work-based project annex, presentation or presentation aides when answering the questions.
- Independent assessors must assess the report, presentation and questioning using the grading criteria. The presentation will cover the work-based project described in component 1 and may mirror the report structure or may be presented in any way that suits the individuality of the apprentice.

The presentation should be audio recorded to support quality assurance, moderation and apprentice appeals process. Any recordings should be stored in line with relevant data protection legislation. They must be destroyed within 1 month of the end of the apprentices' appeals process

The presentation will be completed and submitted after the gateway and will be presented to an independent assessor, either face-to-face or via online video conferencing. If using an online platform, EPAOs must ensure appropriate measures are in place to prevent misrepresentation.

The rationale for this assessment method is:

The presentation reflects the real world delivery of projects in this occupation. Buyers / merchandisers will be expected to present their findings to peers / managers / senior colleagues etc. effective communication is required as part of the standard and can be tested using this method. The role itself follows a longer business cycle than can be evidenced in an observation, so this captures the end to end process effectively.

Delivery

The presentation and questioning will last for a total of 60 minutes. The presentation must take 30 minutes (+10% at the discretion of the independent assessor in order to provide scope for an

apprentice to demonstrate their full abilities), followed by 30 minutes questions and answers (+ 10% again at the discretion of the independent assessor).

To deliver the presentation, the apprentice will have access to:

- PowerPoint
- flip chart
- work products
- videos
- interactive demonstrations
- notes
- computer
- story boards, mood boards, product examples

The presentation will be conducted as follows:

The independent assessor will make all grading decisions.

Venue

EPAOs must ensure that the presentation and questioning elements are conducted in a suitable controlled environment in any of the following:

- employer's premises
- other suitable venue selected by the EPAO (e.g. a training provider)

The venue should be a quiet room, free from distraction and external influence. The venue will also have suitable space and equipment and a clock to ensure the apprentice can monitor time. Wi-Fi will also be required if any aspect of the presentation is interactive.

Support material

EPAOs will produce the following material to support this assessment method:

- Outline of the assessment method's requirements
- Marking materials
- A structured specification and question bank must be developed by EPAOs. The 'question bank' must be of sufficient size to prevent predictability and review it regularly (and at least once a year) to ensure that it, and its content, are fit for purpose. The specifications, including questions relating to the underpinning knowledge, skills and behaviours, must be varied yet allow assessment of the relevant KSBs. EPAOs must ensure that apprentices have a different set of questions in the case of re-sits/re-takes.
- A feedback sheet for apprentices who fail the assessment method, this should be detailed enough to allow the employer and EPAO to decide if a new project needs to be undertaken, or if the presentation needs to be re-written and re-presented.

Assessment Method 2: Professional Discussion, underpinned by a portfolio of evidence (This Method has 1 component.)

Method 2 Component 1: Professional Discussion, underpinned by a portfolio of evidence

Overview

This assessment will take the form of a professional discussion, which must be appropriately structured to draw out the best of the apprentice's competence and excellence and cover the KSBs assigned to this assessment method. It will involve the questions that will focus on coverage of prior learning or activity.

The professional discussion can take place in any of the following:

Employer's premises

A suitable venue selected by the EPAO (e.g. a training provider's premises)

The use of video conferencing (Skype) may also be used to reduce costs

Additional, specific venue requirements include if the portfolio is in a digital format, the apprentice and the independent assessor must have the equipment needed to access their copy.

The rationale for this assessment method is:

This method was judged to be the most appropriate for the KSBs being assessed. It allows a range of examples to be brought forward during the discussion, and ensures that excellence can be evidenced and acknowledged.

Delivery

The independent assessors will conduct and assess the professional discussion.

The professional discussion must last for 75 minutes. The independent assessor has the discretion to increase the time of the professional discussion by up to 10% to allow the apprentice to complete their last answer. Further time may be granted for apprentices with appropriate needs, for example where signing services are required.

The supporting portfolio of evidence should have at least one evidence item where competency is demonstrated against each KSB mapped to this assessment method. The assessors will review the evidence before the professional discussion in order to choose relevant questions from the question bank. The portfolio of evidence can be electronic or paper-based (or a mixture of both) and will be made up of a collection of evidence in a variety of formats including written, audio, and video. Reflective accounts and self-evaluation cannot be included as evidence. Examples would be:

- Video / audio comments / extracts
- Written statements from relevant parties
- Project plans
- Reports / Minutes / Action logs
- Observations
- Discussions from Networks / Working Groups

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- Presentations
- Feedback (managers and Peers)
- Papers written by apprentice
- Performance Reviews

During this method, the independent assessor must ask a minimum of 12 opening questions. They must combine questions from the EPAO's question bank and those generated by themselves.

The professional discussion will be conducted as set out here:

The professional discussion is a structured one-to-one discussion between the apprentice and an independent assessor.

The professional discussion must be appropriately structured to draw out the best of the apprentice's competence and excellence.

The professional discussion must be conducted in a 'controlled environment' i.e. a quiet room, free from distraction and influence, away from the apprentice's work station e.g. onsite office or offsite location.

This can also be taken via skype etc.

Independent assessors must select 6 opening questions from a bank of competency based questions provided by the EPAO. Independent assessors must ask a minimum of 6 additional questions of their own creation so that aspects of the portfolio can be probed and to ensure that all of the KSBs mapped to this method are appropriately covered. Recording documentation for the professional discussion must be developed by the EPAOs.

Independent assessors must be developed and trained in the conduct of professional discussions and reaching consistent judgement by their EPAO.

The independent assessor must use the assessment tools and procedures that are set by the EPAO to record the professional discussion.

The professional discussion should be graded fail, pass or distinction. The portfolio supports the professional discussion and will not be assessed or graded during the end-point assessment. Independent assessors must allocate grades using the grading criteria

The apprentice and the independent assessor will have access to their own copies of the portfolio throughout the discussion and both can refer to it as needed.

The independent assessor will lead the discussion, opening with a question from the EPAO bank of questions, and then use follow-up questions throughout the discussion to allow the apprentice the best opportunity to evidence their competence. These follow up questions will be in addition to the requirement for 12 opening questions

The independent assessor will make notes of evidence / answers provided on the EPAO data capture form.

The Professional Discussion should be recorded electronically, subject to the apprentice's agreement; where permission is not given, it is permissible for another Independent Assessor to be present to document evidence presented.

The independent assessor must use the assessment tools and procedures that are set by the EPAO to record the professional discussion.

The independent assessor will make all grading decisions.

Venue

The professional discussion should take place in a quiet room, free from distractions and influence.

Other relevant information

A structured specification and question bank must be developed by EPAOs. The 'question bank' must be of sufficient size to prevent predictability and review it regularly (and at least once a year) to ensure that it, and its content, are fit for purpose. The specifications, including questions relating to the underpinning knowledge, skills and behaviours, must be varied yet allow assessment of the relevant KSBs.

EPAOs must ensure that apprentices have a different set of questions in the case of re-sits/re-takes.

Independent assessors must be developed and trained by the EPAO in the conduct of professional discussion and reaching consistent judgement.

EPAOs will produce the following material to support this assessment method:

- Outline of the assessment method's requirements
- Marking materials
- Data capture form for evidence and gaps
- Bank of questions to be maintained and meet current rules
- Guidance document for employers and apprentices on the process / timescales for the discussion as well as a description of the purpose of the discussion
- Guidance document for independent assessors on how to carry out the assessment

Weighting of assessment methods

All assessment methods are weighted equally in their contribution to the overall EPA grade.

Grading

Assessment method 1: Work Based Project including a Presentation with Questioning

KSBs	Fail	Pass	Distinction
K1 K3 K8 K13 K14 K15 K17 K18 S2 S7 S11 S13 S14 S16 S17 S18 S20 B1 B2 B3 B7	Does not meet the pass criteria	<p>Using an example demonstrates how they develop an operational or strategic approach to buying/merchandising and the principles of working within these frameworks.</p> <p>Illustrates why it is important to identify current and future customer needs/trends in determining product portfolios and give an example of where they have done this in their organisation, including the impact that this has had on the business and how this has informed the development of a range, product and services.</p> <p>Interprets customer profiles and using an example describes how these are used to influence the impact on the buying and merchandising operation.</p> <p>Describes the dynamics of their team and uses an example to illustrate how they grow these relationships in order to achieve their personal goals and those of their organisation.</p> <p>Identifies the business goals and targets and how these are used to drive the performance and contribution of their team in order for them to achieve their targets.</p> <p>Use an example to detail how they use key performance indicators to drive team and individual performance; and what the contribution to organisation success has been.</p> <p>Outlines how they have analysed customer trends and how they have used these to determine/contribute to the development of customer-focused ranges that meet the current/future brand identity of the business, including how they have used this analysis to</p>	<p>Summarises how a product range is developed in their organisation and how this is evaluated against future trends, products and services.</p> <p>Summarise and provide an example of how they use the organisation's customer service strategy to improve commercial benefit.</p> <p>Justifies how they have used detailed analysis to identify opportunities to improve business performance, detailing recommendations on products and how these were evaluated to influence on-going opportunities for growth.</p> <p>Formulates information on products and use this to influence future buying/merchandising</p>

		<p>support their ideas/opinions towards trends and competitor activity and what opportunities have been identified.</p> <p>Analyse and breakdown data on why and how buying/merchandising is changing, and use this information to influence both the strategic and operational buying patterns and habits of the organisation.</p> <p>Evaluates and describes the commercial performance of the products and uses this to propose actions to take on all future products (both good and poor performing).</p> <p>Demonstrate how they formulate and communicate customer propositions when facilitating negotiations and so maximise opportunities.</p> <p>Outlines how they work within a financial framework and the impact of this on their role and the organisation.</p> <p>Describes their role as an ambassador for the business and what this means to the organisations buying/merchandising strategy.</p> <p>Describe how they adapt themselves in order to demonstrate their professional and pro-active attitude and where they have used this to be accountable for risks that they have taken when making recommendations for products/ranges.</p>	<p>opportunities for the organisation.</p>
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Assessment method 2: Professional Discussion, underpinned by a portfolio of evidence

KSBs	Fail	Pass	Distinction
Core K2 K3 K4 K5 K7 K9 K11 K12 K16 K20 K21 S4 S6 S8 S9 S10 S12 S15 S19 S21 S23 B4 B5 B6	Does not meet the pass criteria	<p>Uses an example to outline the retailer's brand position within UK and global markets, clearly describing the customer profile, flexible purchasing habits and seasonal offers across all channels of the business and how these impact on the buying and merchandising operations.</p> <p>Identifies the detailed application of the principles of competitor analysis, and trend analysis and forecasting, and how these impact on stock planning and profitability with clear links to the brand strategy.</p> <p>Demonstrates an example of the accurate use of systems to gather and analyse information and how they use this to monitor performance targets with suppliers and manage relationships with them.</p> <p>Uses an example to explain the key aspects of the sector in particular around global and domestic trading patterns including where any external factors (such as currency fluctuation) will impact on profit margins and costs.</p> <p>Uses an example of where they have demonstrated effective communication and coaching and mentoring skills in order to support the development of new/less-experienced individuals within the team to improve both their individual and team performance.</p> <p>Outlines the development of the product life cycle and the critical path approach including factors that may affect and impact on seasonal planning, in order to ensure product availability for the customer and drive profit for the organisation.</p> <p>Describes the principles and specific roles of buying and merchandising and how these are used to contribute to new product development and innovation.</p>	<p>Identifies and summarises changes in economic and political factors that impact on their brand, and what actions they took to rectify any negative impacts as well as seeking opportunities for new products.</p> <p>Discuss the expected future sector changes and provide an example of a specific opportunity that this presents your organisation with an outline of how this could be implemented</p> <p>Summarises where they have resolved a real problem such as low performing product, giving details on how this has impacted on the business and the opportunities for future change.</p>

		<p>Identifies where they have implemented a critical path for a product, prioritising the actions they have taken ensuring that the stock has been managed to support the delivery of the sales and profits forecasts for that range.</p> <p>Identifies why ethical and sustainable sources of supply are important in their sector and is able to determine what their organisation is doing in this area, and how they use this approach in the buying and merchandising process.</p> <p>Uses an example to demonstrate how they work with other internal/external departments to build relationships resulting in the drive of activity to deliver business objectives.</p> <p>Describes how they operate within a code of ethics, and identifies the importance of being able to adapt to changes in the markets.</p>	
Buyers K6, K19, S1, S3, S5,		Demonstrates where they have undertaken negotiations with a supplier that has balanced the needs of both the supplier and the organisations need for a financial return on the product.	
Merchandisers K10, S22		Demonstrate how they use data (such as customer trends, buying patterns, stock movement and levels) in order to anticipate customer buying and product patterns to ensure that routes to market are delivered/maintained and business strategies and objectives/KPIs are met.	

Overall EPA grading

All EPA methods must be passed for the EPA to be passed overall.

To achieve a pass, the apprentice must achieve a pass in both assessment methods.

To achieve a pass in an assessment method, the apprentice must achieve a pass in every pass criteria.

To achieve a distinction, the apprentice must achieve a distinction in both assessment methods.

To achieve a distinction in an assessment method, the apprentice must achieve a distinction in 100% of the distinction criteria

Grades from individual assessment methods should be combined in the following way to determine the grade of the EPA as a whole:

Assessment method 1	Assessment method 2	Overall grading
Fail	Fail	Fail
Fail	Pass	Fail
Pass	Fail	Fail
Pass	Pass	Pass
Pass	Distinction	Pass
Distinction	Pass	Pass
Distinction	Distinction	Distinction

Roles and responsibilities

Role	Responsibility
Apprentice	<ul style="list-style-type: none"> • complete the on-programme element of the apprenticeship • prepare for and complete the EPA
Employer	<ul style="list-style-type: none"> • identify when the apprentice is ready to pass the gateway and undertake their EPA • notify the EPAO that the apprentice has passed the gateway
EPAO	<p>As a minimum EPAOs should:</p> <ul style="list-style-type: none"> • appoint administrators/assessors and markers to administer/assess and mark the EPA • provide training and CPD to the independent assessors they employ to undertake the EPA • have no direct connection with the apprentice, their employer or training provider i.e. there must be no conflict of interest • have processes in place to conduct internal quality assurance and do this on a regular basis • organise standardisation events and activities in accordance with this plan's IQA section • organise and conduct moderation of independent assessors' marking in accordance with this plan • have, and operate, an appeals process
Independent assessor	<p>As a minimum an Independent assessor should:</p> <ul style="list-style-type: none"> • be independent of the apprentice, their employer and training provider(s) i.e. there must be no conflict of interest • hold or be working towards an independent assessor qualification e.g. A1 and have had training from their EPAO in terms of good assessment practice, operating the assessment tools and grading • have the capability to assess the apprentice at this level • attend the required number of EPAOs standardisation and training events per year (as defined in the IQA section)
Training provider	<p>As a minimum the training provider should:</p> <ul style="list-style-type: none"> • work with the employer to ensure that the apprentice is given the opportunities to develop the KSBs outlined in the standard and monitor their progress during the on-programme period • advise the employer, upon request, on the apprentice's readiness for EPA prior to the gateway • Plays no part in the EPA itself

Internal Quality Assurance (IQA)

Internal quality assurance refers to the requirements that EPA organisations must have in place to ensure consistent (reliable) and accurate (valid) assessment decisions. EPA organisations for this EPA must:

- appoint independent assessors who have knowledge of the following occupational areas: Experience as a minimum at assistant buyer or assistant merchandiser level, with at least 3 years' experience in the role, (acknowledging that different employers have different job titles)
- appoint independent assessors who have recent relevant experience of the occupation/sector at least one level above the apprentice gained in the last two years or significant experience of the occupation/sector.
- appoint independent assessors who are competent to deliver the end-point assessment
- provide training for independent assessors in terms of good assessment practice, operating the assessment tools and grading
- have robust quality assurance systems and procedures that support fair, reliable and consistent assessment across the organisation and over time.
- operate induction training and standardisation events for independent assessors when they begin working for the EPAO on this standard and before they deliver an updated assessment method for the first time
- ensure all assessors attend regular standardisation events and that as a minimum this attendance is at least once a year.

Re-sits and re-takes

Apprentices who fail one or more assessment method will be offered the opportunity to take a re-sit or a re-take. A re-sit does not require further learning, whereas a re-take does.

Apprentices should have a supportive action plan to prepare for the re-sit or a re-take. The apprentice's employer will need to agree that either a re-sit or re-take is an appropriate course of action.

An apprentice who fails an assessment method, and therefore the EPA in the first instance, will be required to re-sit any failed assessment methods only.

If an apprentice fails the project element of the end-point assessment they will be asked to rework the work based project taking into account the feedback from the independent assessor. They will not be asked to complete a new work based project. The work based project will only be awarded a pass if the apprentice has to resit/retake it.

Apprentices who do not meet any of the timescales for either improving or resitting their work must retake the entire EPA. With regard to the work based project, on such occasion that the independent assessor considers the written report is not of sufficient quality for the presentation to go ahead, the apprentice will be given one opportunity (still within the maximum 8 month timeframe for all assessment methods) to improve their written report so that the presentation may go ahead. In such circumstances, the inadequate written report is not graded. Therefore, on second submission of the written report, the apprentice may still achieve a fail/pass/distinction.

Any assessment method re-sit or re-take must be taken during the maximum EPA period, otherwise the entire EPA must be taken again, unless in the opinion of the EPAO exceptional circumstances apply outside the control of the apprentice or their employer.

Re-sits and re-takes are not offered to apprentices wishing to move from pass to merit/distinction or merit to distinction.

Where any assessment method has to be re-sat or re-taken, the apprentice will be awarded a maximum EPA grade of pass, unless the EPAO determines there are exceptional circumstances requiring a re-sit or re-take.

Affordability

Affordability of the EPA will be aided by using at least some of the following practice:

- using an employer's premises
- use of teleconferencing

Professional body recognition

Professional body recognition is not relevant to this occupational apprenticeship.

Reasonable adjustments

The EPAO must have in place clear and fair arrangements for making reasonable adjustments for this apprenticeship standard. This should include how an apprentice qualifies for Reasonable Adjustment and what Reasonable Adjustments will be made. The adjustments must maintain the validity, reliability and integrity of the assessment methods outlined in this assessment plan.

Mapping of knowledge, skills and behaviours (KSBs)

Assessment method 1: Work Based Project to include a presentation with questions and answers

Knowledge
K1 How to develop an operational or strategic approach to buying and / or merchandising
K3 Product lifecycle from development to customer and the critical path approach to support the buying and merchandising process
K8 Principles of working within strategic operational buying and merchandising frameworks
K13 The importance of keeping up with current trends within the industry
K14 The importance of customer profiles and how they impact buying and merchandising operations
K15 The principles of team dynamics and relationships in order to achieve individual and organisational goals
K17 The goals and targets of the business, the drivers of performance and the contribution of the team in order to achieve these
K18 The key performance indicators of the department, their performance and how to individually contribute to their success

Skills
S2 Contributes to the building of customer focused ranges to meet the brand identity of the business
S7 Applies the organisation strategy to buying and/or merchandising to ensure strategic objectives are met
S11 Uses data to support decisions to influence both the strategic and operational direction of the buying and/or merchandising approach.
S13 Analyses and presents business data to support achievement of business strategies, brand and KPIs
S14 Evaluates commercial performance to support proposed actions for both good and poor product performers
S16 Articulates relevant ideas and opinions towards trends and competitor activity so that opportunities may be identified
S17 Applies customer profile/trend data to inform the development of a range, products and services
S18 Formulates and communicates customer propositions
S20 Demonstrates commercial buying and merchandising within a financial framework

Behaviours
B1 Is creative thinking, and enthusiastic with a positive and professional attitude
B2 Is confident accountable and pro-active
B3 Shows tenacity and is prepared to take risks
B7 Is an ambassador for the business

Assessment method 2: Professional Discussion, underpinned by a portfolio of evidence

Buyers and merchandiser must demonstrate all core KSB and those specific to buying or merchandising identified within this mapping

Knowledge
K2 Industry standards, regulations and legislation relating to the ethical and sustainable sourcing, purchasing and sale of goods to ensure compliance
K3 Product lifecycle from development to customer and the critical path approach to support the buying and merchandising process
K4 Principles of buying and merchandising and the specific role of each
K5 The brand position within the market, which includes both UK and global markets, retailer types and trading models
K6 Effective methods of negotiation, and how they relate to the organisation's strategy, goals and ethical stance
K7 Key aspects of the sector in respect of global and domestic trading patterns
K9 Effective methods of communication to achieve operational success
K10 The principles of internal trend analysis and forecasting
K11 The principles of undertaking competitor analyses
K12 The different purchasing habits of customers, seasonality and the different customer journey across all purchasing channels
K16 The importance of coaching and mentoring to support the development of the buying and merchandising teams
K19 The range and impact of external factors such as currency fluctuation and global suppliers have on profit margin and costs
K20 The impact of stock planning and densities on profitability and how it aligns to organisational/brand strategy
K21 Factors affecting and impacting seasonal planning to ensure availability of appropriate products and to drive profit

Skills
S1 Uses their market/industry knowledge to contribute to new product development and innovation
S3 Ensures product quality and legal compliance by working within industry standards, regulations and legislation to source, purchase and sell goods
S4 Ensures accurate implementation of the critical path prioritising actions accordingly
S5 Negotiates in a manner that balances the need for a sound financial return, with the need to operate ethically, honestly and fairly
S6 Monitors agreed performance targets with suppliers to manage ongoing supplier relationships
S8 Applies an ethical and sustainable approach to the buying and merchandising process in line with policies and procedures to achieve legal compliance
S9 Ensures the agreed route to market is delivered and maintained successfully so that objectives are met
S10 Works with external and internal departments (for example, marketing, distribution, suppliers) to build relationships to drive sales activity and support the delivery of the business objectives across all channels
S12 Demonstrates accurate application of systems in analysing data (for example, customer trends, buying patterns, stock rotation and levels)
S15 Demonstrates anticipation of customer buying and product patterns to forecast future demand
S19 Develops self and individuals to improve personal and team performance and capability
S21 Operates in a manner that produces the required financial rate of return for the business
S22 Ensures effective stock management to support the delivery of the sales and profit forecasts
S23 Coaches and mentors new/less experienced colleagues

Behaviours
B4 Is resilient, organised with an eye for attention to detail
B5 Is flexible, agile and adaptable to changing markets
B6 Operates within professional code of ethics