

# **Level 2 Express Delivery Sortation Hub Operative v1.0**

## **Innovate Awarding Assessment Specification**







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# Innovate Awarding

## Meet our Managing Director



Welcome to the Level 2 Express Delivery Sortation Hub Operative Apprenticeship. Our Innovate Awarding EPA Journeys are designed to ensure the employer, provider, assessor and apprentice have the appropriate support and guidance to allow successful completion of an apprenticeship, providing further confidence and assurance having chosen us as an End-Point Assessment Organisation (EPAO).

We are an Ofqual approved EPAO, experienced in operating within a regulated market. Driven by the employers we work in partnership with, we deliver End-Point Assessment (EPA) in the Health, Care, Education, Leadership, Management, Leisure, Customer Service, Creative, Hospitality, Retail, Transport and Logistics sectors.

Delivering an apprenticeship is an extremely rewarding role. We recognise the need for a clear specification, resources and support, so more valuable time can be spent delivering to an apprentice.

At Innovate Awarding we stand by our 'no surprises' approach to assessment, making an apprenticeship journey as simple as possible, ensuring the best chance of success for every apprentice who undertakes EPA with us.

**Charlotte Bosworth**





## About Innovate Awarding

We are an EPAO approved by the Education and Skills Funding Agency (ESFA) with a collaborative approach to doing business. We work with providers to deliver fit for purpose EPA, providing assessments for a wide range of apprenticeship Standards, certifying thousands of apprentices, continuing to learn and improve with each experience.

We have experienced and responsive teams to ensure the EPA experience is smooth and efficient, working closely with our provider partners ensuring a 'no surprises' approach to EPA for all apprentices.

Please see our website for the range of Standards we are approved to deliver:

<https://innovateawarding.org/end-point-assessment/apprenticeship-standards/>





## Our EPA Journeys

We have created four bespoke EPA Journeys tailored to the individual needs of the employer, provider, assessor and apprentice to enable a cross functional approach to EPA.

The Level 2 Express Delivery Sortation Hub Operative EPA Journeys are available to download on epaPRO.

## epaPRO

epaPRO is our EPA platform, streamlining the process including:

- Apprenticeship registration
- Assessment scheduling to results and certification
- Policy and guidance documents
- Reporting

The platform increases efficiency and reduces administration to support every step of EPA.

epaPRO:

<https://innovate.epapro.co.uk/login>





# The Apprenticeship Standard and Assessment Plan

An Apprenticeship Standard details the knowledge, skills and behaviours (KSBs) required to be occupationally competent:

- **Knowledge** - the information, technical detail, and 'know-how' that someone needs to have and understand to successfully carry out the duties. Some knowledge will be occupation-specific, whereas some may be more generic.
- **Skills** - the practical application of knowledge needed to successfully undertake the duties. They are learnt through on and/or off-the-job training or experience.
- **Behaviours** - mindsets, attitudes or approaches needed for competence. Whilst these can be innate or instinctive, they can also be learnt. Behaviours tend to be very transferable. They may be more similar across occupations than knowledge and skills. For example, team worker, adaptable and professional.

Apprenticeships are an invaluable tool for upskilling in areas that matter most to employers. They are a highly effective route to recruit and train future talent, address skills shortages and develop careers across core parts of the business.

The Level 2 Express Delivery Sortation Hub Operative apprenticeship has been developed by employers working in the sector detailing the knowledge, skills and behaviours required to be occupationally competent and outlining the training and assessment journey for an apprentice.

The apprentice will spend a minimum of 12 months on-programme, working towards the Level 2 Express Delivery Sortation Hub Operative Standard, combining practical training in a job with study. The extent of the on-programme time should be decided for each apprentice based on their prior learning, skills and experience. If employers are using this Standard for an existing employee, it is important to be aware that the role must represent new learning. Providers should support employers with this.

It is vital that the apprentice is prepared and fully ready before they commence their EPA period, which is detailed in the Assessment Plan.

The EPA period will last four months, consisting of:

- Multiple choice test
- Observation with questions
- Interview

# Assessment Journey

## On Programme Learning



01

The minimum on programme duration for the Level 2 Express Delivery Sortation Hub Operative Standard is 12 months. During this time, the apprentice will train to develop their knowledge, skills and behaviours.

## Gateway



02

To reach Gateway the employer will need to be satisfied that the apprentice is consistently working at, or above, the occupational competence of a Level 2 Express Delivery Sortation Hub Operative. At Gateway the apprentice must have achieved Level 1 English and Maths.

## Planning Meeting



03

The planning meeting will take place remotely and will last around 45 minutes. The employer and an Innovate Awarding representative will be present. A laptop with WIFI connectivity will be required.

## Multiple Choice Test



04

The apprentice will be presented with 25 multiple choice questions. They will have a total time of 45 minutes to complete the test.

## Observation with Questions



05

The apprentice will be observed for 90 minutes undertaking work as part of their normal duties. The observation will take 75 minutes with an additional 15 minutes for the Innovate Awarding Assessor to ask questions.

## Interview



06

The interview will take place with an Innovate Awarding Assessor and will last for 60 minutes. The apprentice will be asked a minimum of 12 questions around the sortation hub landscape, best practice, operational performance, maintenance, emergencies and incidents.

## Grading and Certification



07

The assessments will be graded as Distinction/Pass/Fail. The last step along the apprentice's journey will be the receipt of the certificate which will be sent to the employer by the ESFA.



# The Apprentice

An Express Delivery Sortation Hub Operative works in the logistics sector and provides the centralised support that enables the rapid distribution of goods in transit to and from couriers and postal services.

Employers in this sector provide the vital link between those sending and receiving a wide range of letters, parcels, packets and other packages. Organisations are found in the private sector.

A few sortation hubs have direct rail links, but the majority rely on the national road network for distribution. The work is always highly organised and often uses the latest technological solutions, as sortation hubs can process millions of items each day. Sortation hub operatives often work for employers that have national coverage, though some are smaller and more specialist and could focus on certain types of goods.

The role of a sortation hub operative is to contribute to the successful processing of items within the expected timeframe. They receive, assess, and sort goods by destination. These goods are then collected for “final mile” delivery. Goods are typically small enough for manual handling, and could be almost anything, from online shopping orders intended for

home delivery through to business-to-business sales. Sortation hub operatives are vital therefore in ensuring the smooth running of these complex, often automated operations.

Sortation hub operatives do not store or deliver goods themselves. Instead, they provide an express service, turning around the distribution of these goods to couriers/postal services and other road transport operators at great speed, often within a few hours of receipt.

Sortation hub operatives can expect to work indoors and at a fixed site. They usually work shifts, which quite commonly includes some unsociable hours.

In their daily work, an employee in this occupation interacts with other sortation hub operatives within their own team, together with the supervisor or manager who they report to. They may need to contact a specialist team following a major problem, for instance with their IT systems or mechanical equipment. Sortation hub operatives may also be expected to liaise on occasion with the organisation who is either sending, delivering or collecting items, including retailers, wholesalers, manufacturers, courier companies and postal companies.

An employee in this occupation will be responsible for completing their own work to specification, with minimal supervision, ensuring they meet set deadlines. Sortation hub operatives are responsible for maintaining their own workspace, and responsible for operating highly technical, specialist equipment. Depending on the type of employer, this could involve loading/unloading goods using booms (that reach for parcels in trucks) or cages, operating multi-level belt sorters, automated chutes, and using sophisticated IT systems.

They are responsible for meeting quality requirements and working compliantly to their own organisation’s procedures. They must also work in accordance with health and safety considerations. They will typically maintain and clean machinery and fix minor jams. They will respond to incidents and emergencies, such as damage to parcels, but will escalate more significant issues that are beyond their own responsibility. Sortation hub operatives tend to work in teams where everyone has a specialist task and all work together in order to complete their shared goals.





## Off-the-Job Training

Off-the-job training is a statutory requirement for an English apprenticeship. It is training, which is received by the apprentice during the apprentice's normal working hours, for the purpose of achieving the knowledge, skills and behaviours of the approved apprenticeship the learner is completing.

It is an important aspect of apprenticeship training, as it gives the learner time to properly develop knowledge and skills from the programme. At the same time, it can develop a deeper understanding of the wider business, giving a learner insight into the supply chain or different departments.

Off-the-job training allows the learner to take full advantage of the programme, improving the return on investment in training costs for the employer. A developed and upskilled apprentice will lead to an increase in productivity, a clear benefit to the business.

Examples of off-the-job training include:

- Learning new skills at work through shadowing other members of the team, where this activity has been agreed and documented as part of the agreed training plan
- In-house training programmes relevant to the apprenticeship
- Coaching sessions
- Attendance at workshops, training days and webinars relevant to the apprenticeship
- Completion of online learning
- Self-study that includes reading or watching videos
- Training in new working practices or new equipment
- Role-playing or simulation exercises
- Industry visits/conferences relevant to apprenticeships
- Writing assessments, assignments and completing projects or activities
- Practical training or training in the workplace relevant to the apprenticeship

The minimum volume of off-the-job training is six hours per week, irrespective of the hours worked by the apprentice.

## Gateway



Gateway is the entry point to EPA, and it is vital that all parties understand its importance. It is the point at which the apprentice has completed their learning, met the requirements of the Level 2 Express Delivery Sortation Hub Operative Apprenticeship Standard, and the provider and employer have reviewed the apprentice's knowledge, skills and behaviours to confirm they are satisfied that the apprentice is competent and ready to enter their EPA.

Employers are ultimately responsible for deciding when their apprentice is competent as a Express Delivery Sortation Hub Operative and ready to enter EPA. This decision should be taken after conversation with the provider and the apprentice. It is vital this decision is based on each individual apprentice's readiness and not because they have reached the end of the initially agreed training period.

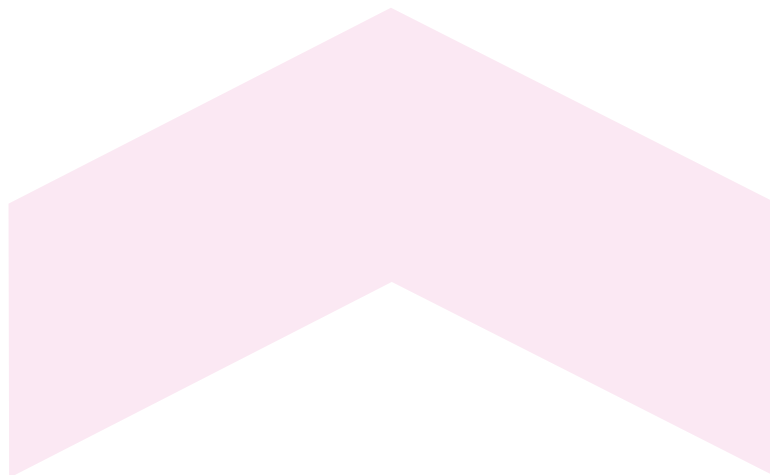


## ✧ Pre-Gateway Checks

Knowing when an apprentice is Gateway-ready is much more than simply checking the apprentice has completed their learning and obtained all the mandatory requirements outlined in the Level 2 Express Delivery Sortation Hub Operative Assessment Plan. Although this is important, it is about the provider, apprentice and employer being convinced that the apprentice is at the level of competence set out in the Standard and that they are prepared for the EPA, so they can claim that competency.

To pass through Gateway, typically the apprentice will have been training for a minimum of 12 months. They must also have:

- Achieved Level 1 English and Maths and have taken the assessments for Level 2
- Satisfied their employer that they are consistently working at, or above, the occupational competence of the Level 2 Express Delivery Sortation Hub Operative
- A signed declaration
- Declared any reasonable adjustments and special considerations



## ✧ Assessment Booking

Applications for any reasonable adjustments and/or special considerations should be submitted prior to Gateway, to allow time to review the request before the planning meeting.

Providers will book a planning meeting on epaPRO once Gateway documents have been reviewed and approved by us.

The purpose of the meeting is to allocate an Innovate Awarding Assessor, discuss assessment dates, confirm assessment timings, assessment requirements and assessment preparation. During the meeting we will discuss what happens if assessments are cancelled/rescheduled and how this could impact the EPA period, as well as providing information on certification and appeals.

The Level 2 Express Delivery Sortation Hub Operative 45 minute planning meeting will book assessment timeslots for the:

- Multiple choice test
- Observation with questions
- Interview

The provider will incur a charge for non-attendance of a planning meeting.

After the planning meeting, the apprentice will receive an email confirming everything discussed in the meeting and a calendar invite for all booked assessments. The apprentice will then prepare for EPA.





# End-Point Assessment

## ✦ Assessment Methods

### Assessment Method 1

#### Multiple choice test

The multiple choice test is a controlled assessment which consists of a series of questions in which apprentices are asked to provide a response.

It will consist of 25 questions, with four options, of which one will be correct.

The apprentice will complete their exam away from the day-to-day pressures of work in a controlled environment, which may be on or off the employer's premises. It is a 45 minute objective, on demand, test which will be in a multiple-choice format ensuring validity and reliability and which allows for consistent, efficient and timely allocation of marks/grades.



### Assessment Method 2

#### Observation with questions

The apprentice will complete a 75 minute observation undertaking work as part of their normal duties in the workplace, followed by 15 minutes of questioning. The observation may be split into discrete sections held on the same working day.

The sortation hub must receive, sort and export different types of goods typically associated with sortation, including, for instance, letters and small parcels. It must include a range of manual and automated sortation equipment that provides the apprentice with the opportunity to fully demonstrate the KSBs mapped to this assessment method.

The apprentice will have the opportunity, if required, to move from one area/function of the business to another in order to best demonstrate how they have applied their KSBs in a real-work environment to achieve genuine and demanding work objectives.

The following activities must be observed during the observation:

- Loading or unloading of goods to/from the sortation hub
- Transfer goods to sortation equipment
- Operate sortation equipment to process goods
- Follow all safety and security and compliance procedures
- Collaborate with workers in the team in order to complete the sortation tasks

The Innovate Awarding Assessor will plan the observation in conjunction with the employer and apprentice to take account of the occupational context. Apprentices must be given at least two weeks' notice of the date and time of the observation with questions.

Following the observation, the Innovate Awarding Assessor will ask a minimum of five questions to assess the apprentice's breadth and depth of competence against the grading descriptors.





Assessment Method 3  
Interview

The interview will be appropriately structured to draw out the best of the apprentice’s competence and cover the KSBs assigned to this assessment method.

Innovate Awarding will make arrangements with the employer for the interview. The apprentice will be given at least 10 days’ notice of the date and time of the interview.

The Innovate Awarding Assessor will conduct and assess the interview. The interview will last for 60 minutes, with the assessor having the discretion to increase the time of the interview by up to 10% to allow the apprentice to complete their last answer.

The interview will be conducted in a controlled environment (a quiet room, away from the normal place of work).

The interview will have a minimum of 12 questions. The purpose of the questions will be to assess the following topics:

- Sortation Hub landscape
- Best practice
- Operational performance
- Maintenance, emergencies and incidents

The Innovate Awarding Assessor may ask follow-up questions generated by themselves to either probe replies further and/or to seek clarification on rationale.

Apprentices are expected to understand and use relevant occupational language that would be typical of a competent person in this occupation.



Grading

Performance in the EPA determines the apprenticeship grade of:

- Distinction
- Pass
- Fail

The Innovate Awarding Assessor will grade the multiple choice test, observation with questions and the interview.

The Innovate Awarding Assessor will combine the individual assessment method grades to determine the overall EPA grade.

To achieve an overall distinction, the apprentice must achieve a pass in the observation with questions and a distinction in both the multiple choice test and interview.

To achieve an overall pass, the apprentice must achieve at least a pass in all the assessment methods.

If the apprentice fails one or more assessment method, they will be awarded an overall fail.

Grades from individual assessment methods must be combined in the following way to determine the grade of the EPA overall.

Multiple Choice Test	Observation with Questions	Interview	Overall Grading
Distinction	Pass	Distinction	Distinction
Distinction	Pass	Pass	Pass
Pass	Pass	Distinction	Pass
Pass	Pass	Pass	Pass
Any grade	Any grade	Fail	Fail
Any grade	Fail	Any grade	Fail
Fail	Any grade	Any grade	Fail



## Annex 1

### ✧ Assessment Plan and Occupational Standard

The Level 2 Express Delivery Sortation Hub Operative Apprenticeship Standard and the latest version of the Assessment Plan can be accessed using this link:

<https://www.instituteforapprenticeships.org/apprenticeship-standards/express-delivery-sortation-hub-operative-v1-0>

**Level 2 Express Delivery Sortation Hub Operative ST0753/AP01  
Version 1.0**

**Sector: Transport and Logistics  
EQA Organisation: Ofqual**



Level 2 Express Delivery Sortation Hub Operative

## Annex 2 Additional Information

### ✧ Results and Certifications

All final assessment component results are published on epaPRO within **seven working days** of the assessment taking place.

We will submit a certificate claim with the ESFA within 15 working days after the final result has been uploaded to epaPRO. The ESFA will send the certificate directly to the employer.

For replacement certificates a request must be emailed to [epa@innovateawarding.org](mailto:epa@innovateawarding.org). Within two days of receiving the email, a replacement certificate will be requested from the ESFA.

### ✧ 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 or re-take any failed assessment method only.

A re-sit is typically taken within two months of the EPA outcome notification. The timescale for a re-take is dependent on how much re-training is required and is typically taken within three months of the EPA outcome notification.

All assessment methods must be taken within a seven month period, otherwise the entire EPA will need to be re-sat/ re-taken.

Re-sits and re-takes are not offered to apprentices wishing to move from pass 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 we determine there are exceptional circumstances requiring a re-sit or re-take.

### ✧ Reasonable Adjustments, Special Considerations and Appeals

Information on reasonable adjustments, special considerations and the appeals process can be accessed by using this link:

<https://innovateawarding.org/end-point-assessment/apprentice-information>



# **Annex 3**

## Support Materials

### ✧ Assessment Method 2 Grading Descriptors



Assessed Criteria	Pass Grading Descriptor
Receiving and Matching Items for Sortation	
<b>K4</b> Machinery operating procedures including sortation belts, chutes, York roll containers, drop bags, mail bags, mail cages, and boom loaders.	Selects the correct equipment to perform both manual and mechanical loading or unloading of items in accordance with operating procedures. <b>(K4 K5 S1 B1)</b>
<b>K5</b> Manual handling and mechanical handling techniques for different types of goods. Techniques for selecting the safest option applicable to the circumstances.	
<b>S1</b> Unload and load items using the correct equipment. For example this may involve cages, bags or booms.	
<b>B1</b> Takes ownership of work.	

Operating Sortation Equipment	
<b>K7</b> Terminology and procedures that apply when using dedicated sortation IT equipment and automated sortation systems.	Selects, prepares and operates the correct equipment/technique to match the items for sortation in line with procedures. <b>(K7 K11 S2 S3)</b>
<b>K11</b> Sortation equipment cycles.	
<b>S2</b> Matches items for sortation with the correct manual, mechanical, or automated handling technique.	
<b>S3</b> Prepares and operates sortation equipment in line with operating instructions.	
<b>S6</b> Respond to data to support the correct flow of automated sortation.	Monitors sortation of items, both by monitoring and responding to equipment performance, and by adjusting the flow of sortation in light of available IT/machine data. <b>(S6 S9)</b>
<b>S9</b> Monitor and maintain sortation equipment to the required functionality. For example, the minor adjusting of belts and chutes during a typical shift.	Monitors automated sorting equipment using data outputs to support any adjustments to the sortation process. <b>(S6 S9)</b>
Teamwork and Compliance	
<b>S15</b> Coordinate own work with that of others in the team to provide the required sortation tasks.	Demonstrates team focus when performing sortation, by coordinating own responsibilities with those of others. <b>(S15 B3)</b>
<b>B3</b> Team-focused and works effectively with colleagues and others.	
<b>S17</b> Work compliantly by following relevant health and safety legislation.	Complies with own organisation’s safety and security requirements and health and safety legislation. <b>(S17 B2)</b>
<b>B2</b> Puts safety and security first for themselves and others.	



## **Annex 3**

# Support Materials

### ✧ Assessment Method 3 Grading Descriptors



Assessed Criteria	Pass Grading Descriptor	Distinction Grading Descriptor
Sortation Hub Landscape		
<b>K2</b> The range of different job roles across express delivery, from supplier through to sortation hub and final mile services.	Lists at least four different job roles that are involved in a successful express delivery service from the point of collection to delivery. <b>(K2)</b>  Explain why both the role of the sortation hub, and working shift patterns, are important. <b>(K3 K20)</b>	Explains why all job roles in the express delivery service contribute equally to the success of the operation. <b>(K2)</b>
<b>K3</b> The importance of the sortation hub in completing a successful express delivery service.		
<b>K20</b> The principles of working with others in shift patterns.		
<b>K19</b> Methods of communication.	Explains how they adapt methods of communication to situation and audience using correct sortation terminology where appropriate. <b>(K19 S5)</b>	Describes a time when the communication methods they first considered were later discounted and justifies their reasons <b>(K19 S5)</b>
<b>S5</b> Adapts own method of communication to the circumstances, using correct sortation terminology.		

Best Practice		
<b>K22</b> Own organisation’s equality and diversity requirements.	Outlines the organisation’s equality and diversity requirements and gives an example of how they have acted with integrity to apply the requirements to support others. <b>(K22 S19 B7)</b>	Justify the upholding of equality and diversity requirements in the workplace. <b>(K22 S19 B4 B7)</b>
<b>S19</b> Support others by following own organisation’s equality and diversity requirements.		
<b>B7</b> Acts with integrity, following own organisation’s required standards.		
<b>B4</b> Committed to keeping up to date with industry best practice.	Explains how they keep up with industry best practice. <b>(B4)</b>	
<b>S16</b> Store and share data only when it is permitted to do so, in line with data protection legislation.	Outlines the steps they follow that ensures they store data correctly and only share data when permitted to do so. <b>(S16)</b>	N/A
Operational Performance		
<b>K6</b> Procedures for collections and returns.	Outlines the main steps they follow that ensures that both their own organisational procedures and any contractual arrangements are followed when handling the goods they are responsible for (including both deliveries, collections and returns situations). <b>(K6 S4)</b>	Justifies the need to follow organisational procedures and contractual arrangements when handling deliveries, collections and returns. <b>(K6 S4)</b>
<b>S4</b> Responds to deliveries, collections and returns in accordance with own organisation procedures and any relevant contractual arrangements.		



<b>K15</b> The European agreement concerning the international carriage of dangerous goods (ADR). Techniques to apply this legislation within own area of responsibility when working with dangerous goods.	Describes the techniques used to apply ADR legislation within their own area of responsibility in the identification and handling of dangerous goods. <b>(K15 S14)</b>	Assesses the impact of ADR legislation on sortation hub working practices. <b>(K15 S14)</b>
<b>S14</b> Identify and handle dangerous goods correctly in accordance with legislative requirements.		
<b>S7</b> Assess and update labelling where required to support smooth transition through sortation to delivery.	Describes an incident where either labelling or item cost was incorrect and how their solution contributed to their continuous improvement and development. <b>(S7 S8 B5)</b>	Explains how their solution to costing or labelling errors could (help or be adopted by) others. <b>(S7 S8 B5)</b>
<b>S8</b> Match item cost to delivery service and respond to irregularities. (For example, identifying a large envelope with a regular stamp).		
<b>B5</b> Sources solutions and seeks to continuously improve and develop.		
<b>S11</b> Create reports on sortation performance, within limits of own role.	Outlines the steps they follow when creating a report on sortation performance. <b>(S11)</b>	N/A
<b>S18</b> Maintain the integrity and security of items in line with procedures.	Describes the procedures which apply to maintain the integrity and security of items being dealt with by their organisation. <b>(S18)</b>	N/A

Maintenance, Emergencies and Incidents		
<b>K10</b> Cleaning and maintenance protocols.	Outlines the cleaning and maintenance protocols for any one type of sortation equipment. <b>(K10 K12 S10)</b>  Explains how they identify any problems with equipment and how they ensure that their own remedies to basic faults are to the expected standard. <b>(K10 K12 S10)</b>	N/A
<b>K12</b> Fault finding principles.		
<b>S10</b> Identify and remedy basic faults in sortation equipment.		
<b>K13</b> Reporting and escalation procedures.	Explains the strategies/techniques they would use to stay calm when they identified a sortation problem where organisational reporting and/or escalation procedures would have to be followed. <b>(K13 S12 B6)</b>	N/A
<b>S12</b> Identify problems beyond own responsibility and escalate to the relevant person.		
<b>B6</b> Calm under pressure.		
<b>K14</b> Contingency plans.	Outlines the organisation's contingency plans that relate to incidents and emergencies. <b>(K14 S13)</b>	N/A
<b>S13</b> Follow the contingency procedures that relate to incidents and emergencies. For example, damaged parcels or breakages.		



## **Level 2 Express Delivery Sortation Hub Operative**

# **Innovate Awarding Assessment Specification**

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