

Level 2 Retailer v1.2

Innovate Awarding Assessment Specification



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Innovate Awarding

Meet our Managing Director



Welcome to the Level 2 Retailer 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



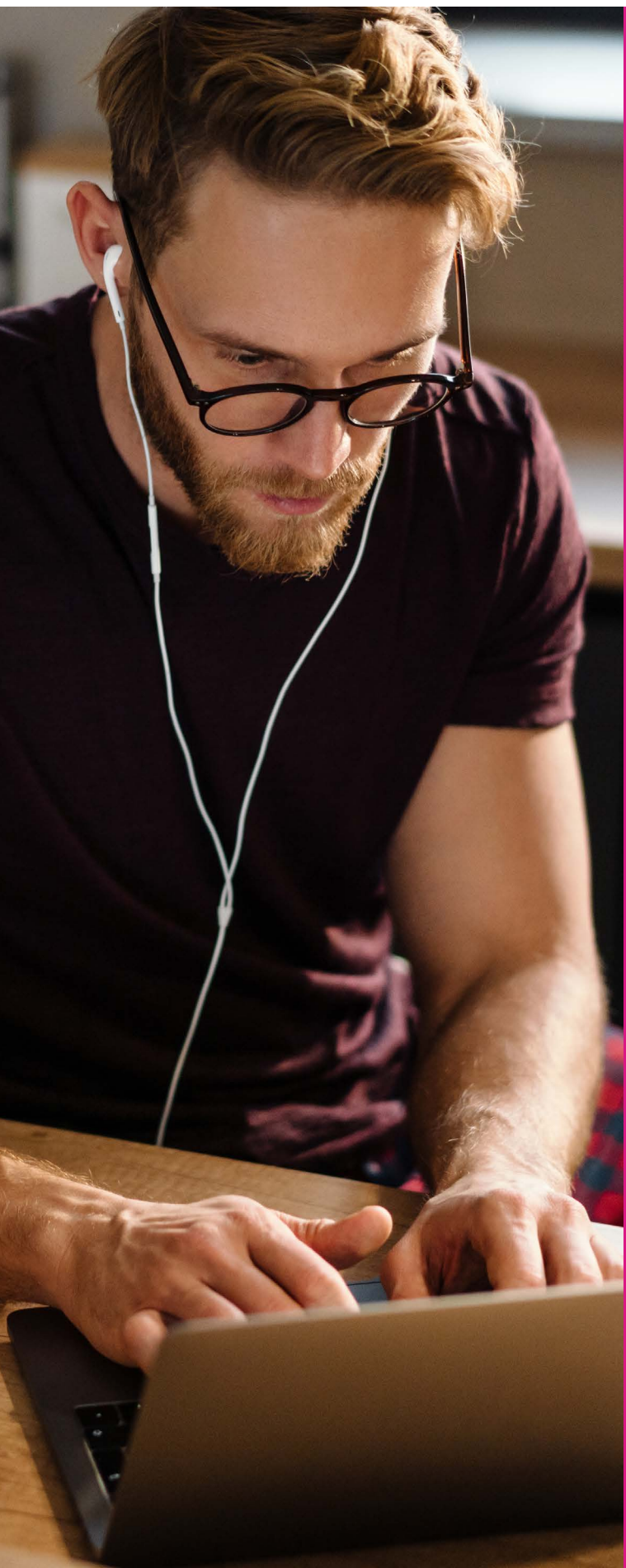
About Innovate Awarding

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 Retailer 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 Retailer 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 Retailer 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 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 three months, consisting of:

- Observation with questions
- Interview underpinned by portfolio

Assessment Journey

On Programme Learning

The minimum on programme duration for the Level 2 Retailer Standard is 12 months. During this time the apprentice will develop their knowledge, skills and behaviours and compile a portfolio of evidence.

Planning Meeting

The Planning Meeting with the apprentice and a member of the Innovate Awarding team will take place remotely and will last around 30 minutes. The employer should be present and dates for submissions and assessment will be agreed.

Interview underpinned by Portfolio

The interview will take place with an Innovate Awarding Assessor and will last for 60 minutes. They will ask at least six questions after reviewing the apprentice's portfolio of evidence. The portfolio itself will not be marked.



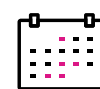
01

Gateway

To pass through Gateway the employer will need to be satisfied that the apprentice is consistently working at, or above, the occupational competence of the Level 2 Retailer. At Gateway the apprentice must have completed training towards English and Maths qualifications in line with the apprenticeship funding rules. At Gateway, the apprentice will submit their portfolio of evidence for review.



02



03

Observation with Questions

The apprentice will complete a two-and-a-half-hour observation with questions with an Innovate Awarding Assessor at their workplace. They will be observed demonstrating customer support, stock control and communication during the observation. The assessor will ask at least five questions both during and after the observation.



04



05

Grading and Certification

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



06

The Apprentice

A Retailer is found in organisations of all sizes within the retail and tourism sector such as food, fashion, furniture, and automotive. Retail outlets range from traditional high street shops to larger organisations such as supermarkets and department stores. They are found in multi-national employers, small independent employers, and employers who trade through a variety of channels for example face to face, telephone, on-line and mail order retail.

The broad purpose of a Retailer is to advise on and sell products and services in a customer-centric retail environment. This includes creating an accessible and well-presented environment. Retailers provide information and advice to customers regarding stock, products, different ways customers can shop and various payment methods.

A Retailer works flexible hours and shifts such as evenings, nights, and weekends. Face to face or instore roles may involve moving and replenishing stock, using relevant equipment such as pallet truck, steps, and trolley.

In their daily work, a Retailer interacts with internal stakeholders such as members of their own team, other

departments, and senior management. They also interact with external stakeholders such as customers, delivery drivers and compliance officers.

A Retailer will be responsible for maintaining business standards; ensuring stock is presented, replenished and available for the customer to purchase. A Retailer will contribute towards the commerciality of the business by achieving targets, including sales and customer service, and following stock control in line with business objectives. They need to know the services they are selling to be able to build customer confidence in their business.

A Retailer works to meet or exceed customer expectations and experience and will identify specific needs of individual customers. They will respond to customer enquiries complying with both business and legal requirements. They will have a knowledge of sustainability in relation to products such as dealing with excess packaging, waste and product sourcing.

A Retailer who works within smaller retail sites may have additional responsibilities such as where the stock is placed in store and planning the order of tasks. A Retailer may be responsible for supporting the development of new colleagues through buddying or one to one coaching. A Retailer typically works as part of a wider team, depending on the size of the organisation, reporting to a line manager or small shop owner.

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 Retailer Apprenticeship Standard, and the provider and employer will 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 Retailer and ready to enter EPA. This decision should be taken after conversation with the provider and 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 Retailer 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 EPA, so they can claim that competency.

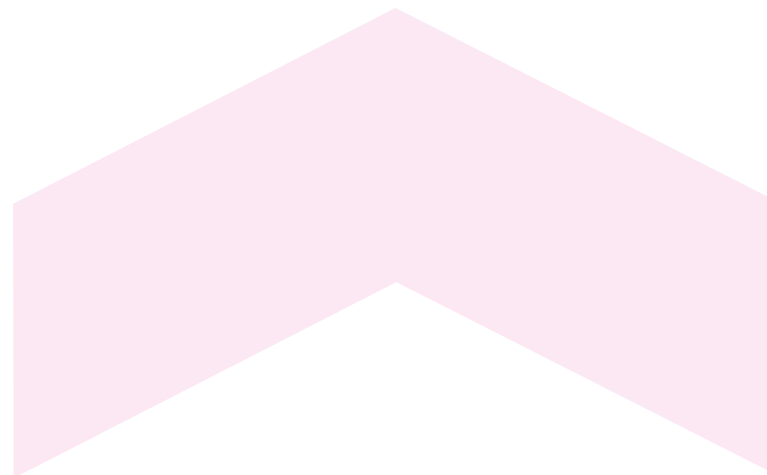
To pass through Gateway, the apprentice must have been training for a minimum of 12 months. They must also have:

- Achieved English and maths qualifications in line with the apprenticeship funding rules
- Satisfied their employer that they are consistently working at, or above, the occupational competence of the Level 2 Retailer
- Compiled a portfolio of evidence
- A signed declaration
- Declared any reasonable adjustments and special considerations

Readiness for Gateway includes confirming that the apprentice's portfolio meets the requirements of the knowledge, skills and behaviours set out within the Level 2 Retailer Standard. This will be confirmed at Gateway and documented on epaPRO. This notifies us that the apprentice is ready for their assessment and the EPA planning meeting will be organised.

✧ What happens during Gateway?

The portfolio of evidence will be provided at Gateway. The Innovate Awarding Representative will agree a plan and schedule for each assessment method with the apprentice and employer to ensure all components can be completed within a three-month end-point assessment window.



✧ 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 can 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 Retailer Standard will have a 30 minute planning meeting which will book assessment timeslots for the:

- Observation with questions
- Interview underpinned by portfolio

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.



✧ Portfolio of Evidence Guidance

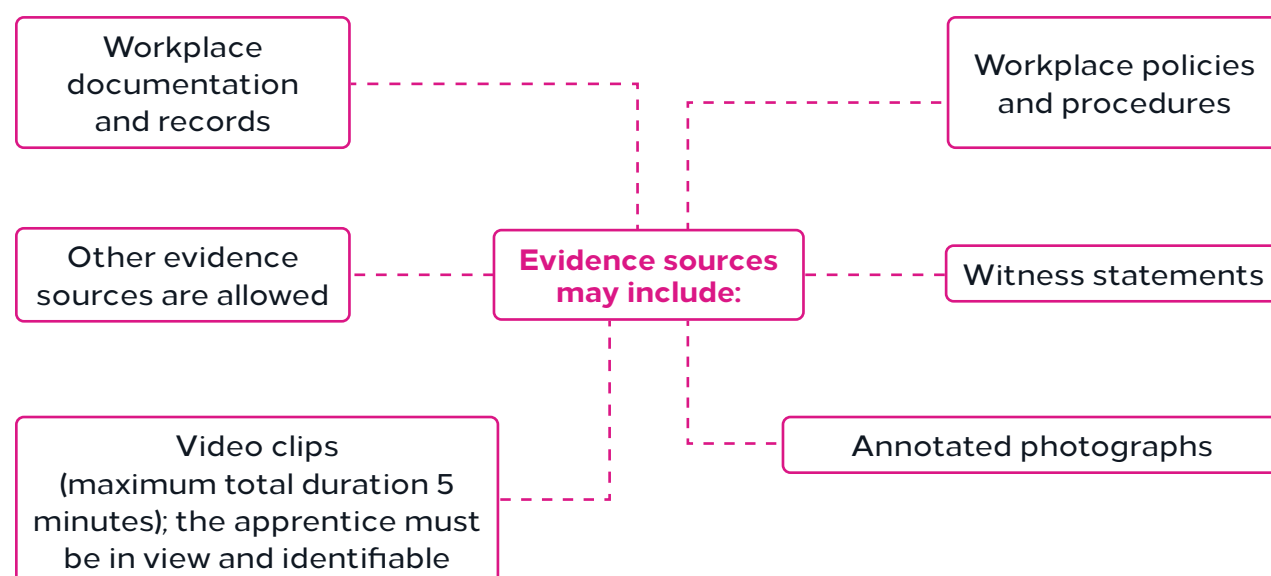
Employers will ensure their apprentice has compiled a portfolio during the on-programme period of the apprenticeship, which will be submitted at Gateway. It underpins the interview but will not be assessed by us.

We will review the portfolio of evidence in preparation for the interview prior to Gateway. Feedback is not required, although generally if Gateway is rejected due to the portfolio of evidence being inadequate, a courtesy email will be sent with an explanation, including the rejection reason on epaPRO.

Portfolio of evidence content and format are typically Word documents, presentations, video or audio recordings. The provider will upload the portfolio of evidence to epaPRO at Gateway, either by inserting a link to a SharePoint or including a zip file.

Portfolio of evidence requirements:

- Apprentices must compile a portfolio of evidence during the on-programme period of the apprenticeship
- It must contain evidence related to the KSBs that will be assessed by the interview
- The portfolio of evidence will typically contain 14 discrete pieces of evidence
- Evidence must be mapped against the KSBs
- Evidence may be used to demonstrate more than one KSB; a qualitative as opposed to quantitative approach is suggested



End-Point Assessment

✧ Assessment Methods

Assessment Method 1

Observation with questions

The observation with questions must take two and a half hours, the Innovate Awarding Assessor can increase the time of the observation by up to 10%. This time is to allow the apprentice to complete a task or respond to a question if necessary.

The Innovate Awarding Assessor observes the apprentice in their workplace. The apprentice completes their day-to-day duties under normal working conditions. This allows the apprentice to demonstrate the KSBs shown in the mapping through naturally occurring evidence.

The observation and responses to questions must be assessed holistically by the Innovate Awarding Assessor when they are deciding the grade for the observation with questions.

Innovate Awarding must give an apprentice seven days' notice of the observation and the observation may be split into discrete sections held on the same working day.

The Innovate Awarding Assessor will explain to the apprentice the format and timescales of the observation before it begins. This does not count towards the assessment time.

The Innovate Awarding Assessor will observe the following during the observation:

- Customer support
- Stock control
- Communication

The Innovate Awarding Assessor must ask at least five questions about KSBs that were not observed to gather assessment evidence. Questioning can be asked both during and after the direct observation and the time for questioning is included in the overall assessment time.

The observation with questions must take place in the apprentice's normal place of work (for example the employer's premises or a customer's premises). Equipment and resources needed for the observation must be provided by the employer and be in good working condition.

Questioning that occurs after the observation should take place in a quiet room, free from distractions and influence.

Assessment Method 2:
Interview underpinned by portfolio

In the interview, the Innovate Awarding Assessor and apprentice have a formal two-way conversation. It gives the apprentice the opportunity to demonstrate their competency across the KSBs as shown in the mapping.

Innovate Awarding will give an apprentice seven days’ notice of the interview. The Innovate Awarding Assessor will need at least two week(s) to review the supporting documentation.

The apprentice will have access to their portfolio of evidence during the interview, which they can refer to and use to illustrate their answers. The portfolio of evidence is not directly assessed.

The interview must last for 60 minutes. The Innovate Awarding Assessor can increase the time of the interview by up to 10%. This time is to allow the apprentice to respond to a question if necessary.

For the interview, the independent assessor will ask at least six questions. Follow-up questions may be asked.

The interview should take place in a quiet room, free from distractions and influence. It can be conducted by video conferencing. Innovate Awarding will verify the identity of the apprentice and ensure the apprentice is not being aided.



Grading

Performance in the EPA determines the apprenticeship grade of:

- Distinction
- Pass
- Fail

The Innovate Awarding Assessor will grade the observation with questions and the interview underpinned by portfolio.

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

To achieve an overall distinction, apprentices must achieve distinction in both assessment methods.

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

If the apprentice fails one or more assessment methods, 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.

Observation with Questions	Interview underpinned by portfolio	Overall Grade
Distinction	Distinction	Distinction
Distinction	Pass	Pass
Pass	Distinction	Pass
Pass	Pass	Pass
Any grade	Fail	Fail
Fail	Any grade	Fail

Annex 1

✧ Assessment Plan and Occupational Standard

The Level 2 Retailer Apprenticeship Standard Occupational Standard and the latest version of the Assessment Plan can be accessed using this link:

<https://www.instituteforapprenticeships.org/apprenticeship-standards/retailer-v1-2>

**Level 2 Retailer
Version 1.2**

**Sector: Sales, Marketing and Procurement
EQA Organisation: Ofqual**



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. Within two days of receiving the request, 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. You 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 methods only.

Any assessment method re-sit or re-take must be taken within a six-month period from the EPA outcome notification, otherwise the entire EPA must be taken again, unless, in the opinion of us, exceptional circumstances apply outside the control of the employer or the apprentice.

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 1 Grading Descriptors



Assessed Criteria	Pass Grading Descriptor	Distinction Grading Descriptor
Customer Support		
K6 Methods for communicating with customers, to support and increase sales, and encourage customer loyalty.	Communicates using a range of techniques to identify customer requirements and influence their purchasing decisions in line with legislation, brand standards, and business procedures and values. (K6 S1 S2 S4) Acts as an ambassador for the business or brand to maintain its reputation. (K8 B2)	Explains how their approach encourages customer loyalty and repeat business and why this is important. (K6 K8 S1 S2 S4 B2)
K8 The importance of brand and business reputation and what can affect it.		
S1 Communicate with customers to meet their requirements and encourage customer loyalty and repeat business.		
S2 Serve customers in line with brand standards, legislation, business procedures and the values of the business.		
S4 Use face to face or online sales techniques such as product and price comparisons to support or influence the customer in their purchasing decisions.		
B2 Acts as an ambassador for their business and brand.		



Stock Control and Merchandising		
K5 The business approach to sustainability and its carbon footprint such as approaches to product sourcing, waste reduction and recycling.	Contributes to effective and safe merchandising activities, applying visual and/or digital skills to enhance sales. (K9 S7) Organises and maintains stock levels and storage conditions in order to meet customer demand and minimise losses, whilst ensuring safety. (K10 S8) Complies with relevant regulations, legislation, and business procedures, including those related to the business approach to sustainability such as waste reduction and recycling. (K5 S11)	Explains how implementing successful merchandising and stock control supports the business, and the potential consequences of poor practice. (K10 S8)
K9 The use of visual and/or digital merchandising skills including the use of “hot spots” and the relationship this has with sales and use of space.		
K10 How to maintain stock levels and the conditions they must be stored in to meet customer demand, sales opportunities, marketing activities and seasonal variations.		
S7 Maintain good merchandising to meet the needs of the business whilst ensuring safety.		
S8 Maintain stock levels and storage conditions such as correct temperature, lighting, ventilation, packaging to meet customer demand and minimise stock loss.		
S11 Comply with regulations and legislation relevant to their role and business.		

Technology		
K11 How to operate IT and digital systems, and applications.	Uses technology and applications to support sales and service, reporting maintenance issues in line with the business' procedures, and explaining how they have adapted when necessary. (K11 S9 B5)	Uses IT and digital systems confidently, explaining how they can improve the customer experience and benefit the business. (K11 S9)
S9 Use technology and applications to support sales and service ensuring that maintenance issues are reported.		
B5 Works flexibly and adapts to circumstances.		

Annex 3

Support Materials

✧ Assessment Method 2 Grading Descriptors



Assessed Criteria	Pass Grading Descriptor	Distinction Grading Descriptor
Legislation, Regulations and Organisational Policies/Procedures		
K13 Relevant regulatory and legislative requirements which impact on the retail sector such as the sale of bladed items, high fats, salt and sugar, safety requirements, and age restricted sales.	Explains the regulatory and legislative requirements which impact on their role in retail. (K13) Details the business’s policy for exchange and refunds of products. (K16) Explains, with examples, how they have handled or escalated complaints in an approachable and professional way, building positive relationships with customers. (S13 B6)	Explain how dealing with refunds, exchanges and legislative requirements can impact on the business, both positively and negatively. (K13 K16)
K16 The business’s policy for exchange and refunds of products for in-store and/or online purchases.		
S13 Handle complaints within remit or escalate as appropriate.		
B6 Acts in an open and approachable manner to build and maintain inclusive relationships with others.		



Customer Profiles, Business Objectives and Reputation		
K1 The customer profile of the business and customers’ purchasing habits.	Describes the typical customers of the local community, the business, and their purchasing habits and how they use this to provide a retail service that balances customer needs with additional linked products and services, and the promotion of seasonal or local offers. (K1 K4 S3 S5) Describes the brands, products and services provided by the business and explain how this supports sales throughout the calendar year. (K7 S14) Explains how their role contributes to the business aims and objectives, and how it supports the overall financial performance of the business. (K2 K3) Gives examples of ways in which they can support the business’s approach to sustainability in their role. (S12) Describe how they identified a situation that had the potential to damage the business’ reputation and the professional actions they took to minimise any damage. (S6 B1)	Explains the importance of understanding the makeup of their local community and how this impacts the requirements of the customer. (K4)
K2 The business aims and objectives and how their work contributes to them.		
K3 The principles of running a retail business to support the overall financial performance, for example by aiming to exceed targeted sales, reduce wastage and returns.		
K4 The makeup of the local community and the requirements of customers within it.		
K7 The brands, products and services provided by the business including knowledge of the technical specification of a product and aftercare service.		
S3 Provide a retail service that balances the customers’ needs with additional linked products and services.		
S5 Promote seasonal or local offers through in-store or online promotions.		
S6 Identify situations that may damage business reputation in line with company policy and escalate as required.		
S12 Contribute to continuous improvement activities which focus on improving sustainability within the business.		

S14 Support sales across a range of promotional events throughout the calendar year.		
B1 Acts in a professional manner with integrity and confidentiality.		
Self and Team Development		
K12 How to support and influence the team, and how all colleagues and teams work together to meet business objectives.	Provides examples of how they support and develop their team in line with equality, diversity, and inclusion principles, explaining how this benefits the customer and business. (K12 K14 K15 S10) Explains how they manage their workload and gives examples of when they have sought learning and development opportunities. (B3 B4)	N/A
K14 Principles of equality, diversity and inclusion and the impact on the customer experience and business.		
K15 The support requirements and/or coaching needs of their team.		
S10 Support team and colleague development through buddying and/or coaching.		
B3 Seeks learning opportunities and continuous development.		
B4 Has accountability and ownership of their tasks and workload.		

Level 2 Retailer v1.2

Innovate Awarding Assessment Specification

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