



# Pearson

## End-Point Assessor for Financial Services Customer Adviser (Level 2 & Level 3)

### About Pearson

Pearson is the world's leading learning company, with 35,000 employees in more than 70 countries working to help people of all ages to make measurable progress in their lives through learning. We put the apprentice at the centre of everything we do, because wherever learning flourishes, so do people. Find out more about how we can help you and your learners at [qualifications.pearson.com](http://qualifications.pearson.com)

### Overview of the independent end-point assessor role

Government has introduced a requirement that all apprenticeships contain an end-point assessment (EPA) which is a holistic assessment of the Knowledge, Skills and Behaviour (KSBs) that have been learnt throughout the apprenticeship. This is to make sure that apprentices meet the rigorous standard set by employers and are fully competent in the relevant occupation. Pearson must provide employers with the confidence that completing an apprenticeship means an individual is fully job-ready and that all apprentices, following the same standard, are assessed consistently, regardless of where they are undertaking their apprenticeship or who they are doing it with.

An independent EPA means that those making a decision on the competency of the apprentice have nothing to gain from the outcome of the assessment. To maintain independence within the scope of this EPA, an independent End-Point assessor can only undertake end-point assessments of apprentices, with whom they have no conflict of interest. This means they must not have been involved in the on-programme training, assessment, or line management of such apprentices.

The End-Point assessments will be conducted onsite, on dates agreed with employers and/or providers if appropriate. Independent end-point assessors (EPAs) will record and submit the EPA outcomes, with clear justifications for the grading decisions. EPA activities will be quality assured by Pearson quality assurance representatives.

EPA will be trained, standardised and approved to operate as EPAs. They will undertake EPAs in line with the associated apprenticeship assessment plan, and the materials provided by Pearson.

## Key Accountabilities:

The EPA will:

- Take part in regular training and standardisation activities, associated with the role of EPA
- Maintain and provide evidence of ongoing, relevant Continuous Professional Development (CPD)
- Assess the performance of candidates in accordance with published assessment and grading criteria and procedures, ensuring overall standards are maintained
- Follow the protocols set out in Pearson's specifications, assessment materials and quality assurance protocols, relating to the EPAs
- Maintain service-level agreements with regards to responding to EPA planning, operational activities, reports and submissions of assessment outcomes
- Report all risks and issues encountered during the end-point assessment to Pearson, including any suspected malpractice/maladministration
- Ensure all EPA reports and assessment evidence are high quality and recorded accurately
- Support Pearson, if necessary, with any appeals from apprentices, regarding assessment decisions
- Raise any conflicts of interest, including in relation to the independence of assessment
- Ensure that any personal actions are completed, as required by Pearson
- Contribute to the continuous improvement of Pearson's end-point assessment activities by the Institute for Apprenticeships and Technical Education.

## Person Specification

### Background and Experience (essential):

- Evidence of assessing staff or learner competence, at the level or above of the EPA
- Hold or be working towards an assessor qualification (e.g. A1, TAQA etc)
- Experience of leading meetings/structured interviews/discussions
- Current experience of working within one or more financial services industries for example, banks and building societies, insurance, claims and loss adjustment, pensions, mortgage and/or financial planning (for a minimum of two years)
- Current experience within a front line role related to delivering financial services to customers including leading and developing teams (for a minimum of two years)
- Evidence of CPD, in line with the EPA specialism
- Experience of complying with quality assurance/regulatory requirements
- Current DBS certificate

### Background and Experience (desirable):

- To hold an appropriate financial services qualification at level 3/4 (or higher) qualification/examination from either CBI, CII, CISI, IFA/LIBF, CILA or equivalent
- To hold, or be working towards an internal quality assurance qualification
- Experience of working in more than one industry/sector
- Experience of making grading judgements
- Knowledge of prevent & safeguarding

## **Skills & Knowledge (Essential)**

- Excellent written, verbal, IT and interpersonal skills, including the ability to effectively respond to conflicts
- Flexibility to understand and respond to the individual needs and circumstances of employers/apprentices
- Sufficient and relevant technical knowledge of:
  - financial services legal and regulatory frameworks
  - a range of products and services offered within the financial services sector
  - systems, tools and processes used within financial services roles
- Excellent understanding of the associated apprenticeship standard, assessment plan, specification, assessment instruments and recording tools
- Ability to assess, free from bias
- Ability to assess and report risks
- Ability to meet deadlines

## **Other requirements**

Any applicant undertaking this role will be expected to:

- Have personal IT equipment capable of running Pearson required software
- Have a suitable broadband connection, Microphone, Headphones and a webcam
- Have a personal and secure email account
- Have a postal address in the United Kingdom or Republic of Ireland, Guernsey, Jersey Isle of Man
- Have the right to work in the UK