



Level 4 Business Analyst

EPA Overview

July 2024



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1. EPA headlines

- Must be on programme 366 days before entering gateway
- Must have Portfolio, Project Proposal Title and Summary Document, Maths and English prior to Gateway
- Project Proposal Title & Summary document (Gateway) - Max 500 words +/- 10%
- EPA window 3 months – 6 months if re-sit required
- 2 x Assessment methods at EPA – 1. Project Proposal & Presentation, 2. Professional Discussion underpinned by the portfolio
- Project must start within the EPA window
- Project Proposal and Presentation must be submitted after a Maximum 6 weeks of EPA start date
- Project Proposal (EPA) - Max 5,000 words +/- 10%
- Presentation & Questioning Lasts 45 Mins
- Professional Discussion Lasts 60 mins – Underpinned by Portfolio
- Professional Discussion - Minimum of 10 open ended questions

2. Gateway

Gateway is the point that the employer is satisfied that the apprentice is consistently working at or above the level set out in the occupational standard. In making this decision, the employer may take advice from the training provider, but the decision must ultimately be made by the employer.

Apprentices must have been on programme for at least 366 days prior to entering gateway, and must also meet the following gateway requirements for Level 4 Business Analyst programme:

- Portfolio of evidence
- Portfolio checklist
- Project proposal title and summary document
- EPA gateway form
- Employer declaration
- Level 2 English and Maths evidence

The EPAO determines when all gateway requirements have been met, and the EPA period will only commence once the EPAO has confirmed this..

3. End Point Assessment

The EPA window for Level 4 Business Analyst is typically 3 months but may be extended to a maximum of 6 months if an apprentice is required to re-sit or re-take any assessment(s).

For the End Point Assessment, the learner must complete the following assessments:

- Assessment method 1: Project Proposal with Presentation and Questioning
- Assessment method 2: Professional Discussion underpinned by Portfolio

Assessment Method 1: Project Proposal with Presentation and Questioning

The Project Proposal with Presentation and Questioning assessment is graded Pass, Distinction or Fail. This assessment has 2 components.

Component 1: Project Proposal

The project proposal must be undertaken after the apprentice has gone through the gateway process. Apprentices will create a project proposal for a work-based project in the form of an electronic report. Apprentices will also prepare a presentation to be delivered to an Independent Assessor. The project proposal and presentation must be submitted to the EPAO after a maximum of 6 weeks of the EPA start date.

The employer must ensure the apprentice has sufficient time and the necessary resources, within this period, to undertake the project and prepare a presentation. Whilst completing the project proposal, the apprentice should be subject to normal workplace supervision.

The project proposal 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.

The project proposal may be based on any of the following:

- An idea/opportunity to improve the business or a system by using the Business Analysis techniques and stakeholder engagement
- A specific business problem concerning stakeholder engagement challenges to be addressed using Business Analysis techniques
- A recurring issue with stakeholder relationships within a Business Analysis context to be addressed using Business Analysis techniques.

The project proposal must include:

- An introduction
- Scope and proposed aims of the project
- Plan of activities
- How the proposed aims will be achieved
- Proposed approach including communications and stakeholder engagement
- Research, analysis, and findings
- Recommendations

The project proposal has a maximum word limit of 5,000 words, including tables, graphs, figures, though excluding references and annexes. A tolerance of plus or minus 10% is allowed. The project proposal must map, in an appendix, how it evidences the relevant KSBs for this assessment method.

Component 2: Presentation with Questioning

The project presentation with questioning is carried out with an Independent Assessor sourced by the EPAO. The presentation and questioning will last 45 minutes, with a discretionary 10% additional time to allow the apprentice to complete their last answer. The presentation will typically last 15 minutes, and the questioning will follow. The apprentice will be asked a minimum of 10 questions based on the knowledge, skills, and behaviours identified for this assessment method.

The Independent Assessor will have a minimum of one week to review the project proposal and presentation ahead of the questioning. The project proposal and presentation must be available to the apprentice during the questioning assessment.

Assessment Method 2: Professional Discussion underpinned by Portfolio

The Professional Discussion underpinned by Portfolio assessment is graded Pass, Distinction or Fail.

The professional discussion is carried out with an Independent Assessor sourced by the EPAO. The professional discussion will last 60 minutes, with a discretionary 10% additional time to allow the apprentice to complete their last answer. The apprentice will be asked a minimum of 10 open questions based on the knowledge, skills, and behaviours identified for this assessment method.

The portfolio will be compiled by the learner whilst on programme and should relate to the KSBs for this assessment. The portfolio underpins the professional discussion but is not directly assessed and therefore will not be marked. A copy of the portfolio must be available to the apprentice during the professional discussion.

4. Grading

Project Report with Questioning	Professional Discussion underpinned by Portfolio	Final Grade
Fail	Any grade	Fail
Any grade	Fail	Fail
Pass	Pass	Pass
Pass	Distinction	Merit
Distinction	Pass	Merit
Distinction	Distinction	Distinction

5. Resit and Retakes

Apprentices who fail one or more assessment method will be offered the opportunity to take a resit or a retake at the employer’s discretion. The employer will need to agree that either a resit or retake is an appropriate course of action. A resit does not require further learning, whereas a retake does.

Apprentices will have a supportive action plan to prepare for a resit or a retake of any failed assessment. All assessments must be successfully completed within the maximum EPA window, otherwise the full EPA will need to be resat or retaken.

Where any assessment method must be resat or retaken, the apprentice will be awarded a maximum EPA grade of Distinction.

Further information on the Level 4 Business Analyst EPA can be found in the [assessment plan](#). A full list of the Knowledge, Skills and Behaviours (KSBs) can be found on the Institute for Apprenticeships website [here](#).

