

City & Guilds Level 5 End-point Assessment for Operations Manager (9309-33)

Standard: ST0385

EPA Plan: Version V1.4

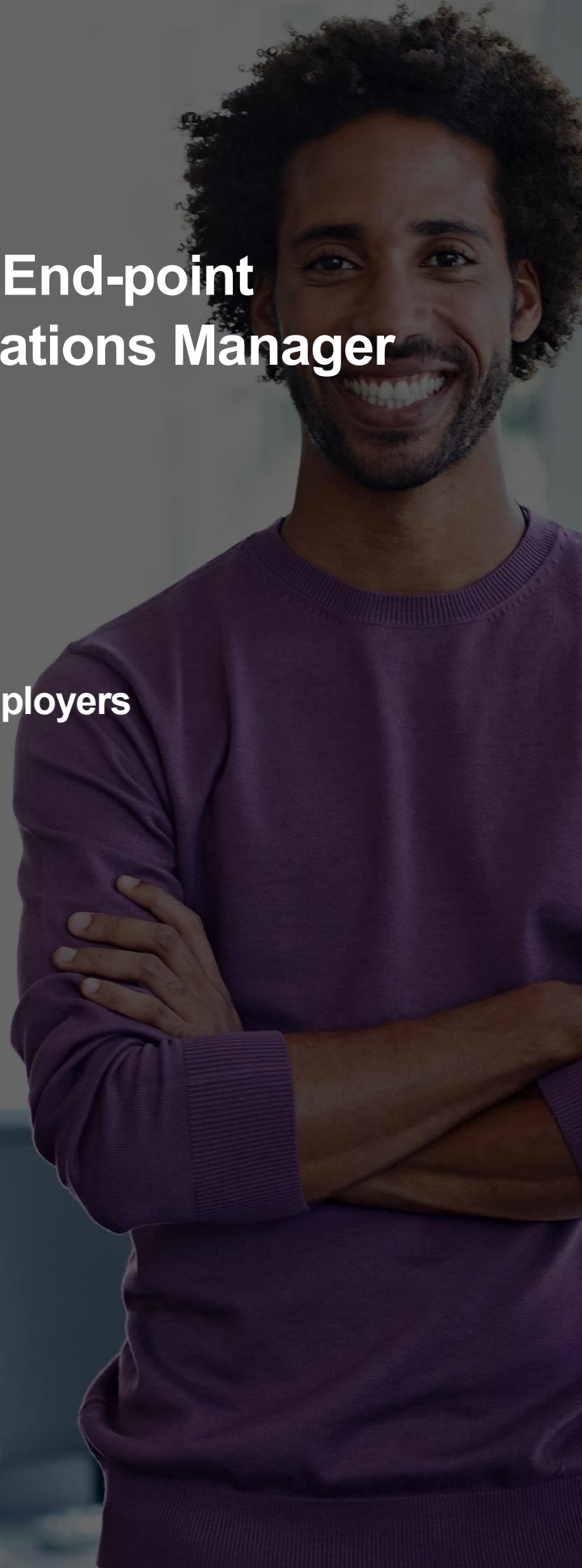
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EPA Pack for Providers and Employers

Version 1.1

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For external use



Version	Summary of changes	Section
1.0 March 2025	Document created	All
1.1 March 2025	Minor formatting updates	Throughout

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1. Apprenticeships



This pack will help providers and employers prepare apprentices for the End-point Assessment (EPA) of their City & Guilds Level 5 End-point Assessment for Operations Manager (9309-33). It explains how apprentices will demonstrate the knowledge, skills and behaviours (KSBs) which they developed during their apprenticeship.

This pack must be used alongside the:

- [ILM/City & Guilds Manual for the End-point Assessment Service](#)
- Recording Forms for Providers and Employers
- [EPA Documents Library](#), including information about the EPA Service, policies about malpractice and appeals, FAQs, and a video about EPA which can be shared with apprentices.

The ILM/City & Guilds Manual for the End-point Assessment Service includes information on:

- application, registration and booking
- assessment
- results and post results (including resits)
- fees
- quality assurance.

Full-time apprentices will typically spend 24 months on programme working towards meeting the Standard. The apprentice must spend at least 12 months on programme and complete the required amount of off-the-job training as specified in the apprenticeship funding rules. The employer should ensure that the apprentice has access to development opportunities to gain the Knowledge, Skills and Behaviours (KSBs), as outlined in the Standard, and must hold regular progress reviews with the provider and apprentice.

Once the apprentice has completed their training, they should be ready to go through 'Gateway' to EPA. See the [Gateway](#) and Assessment Instructions sections within this pack to understand what happens.

The EPA for this apprenticeship includes the following assessments which can be taken in any order, as requested by the apprentice:

- 9309-706 Project Report
- 9309-707 Professional Discussion underpinned by a Portfolio of Evidence.

Preparing for the EPA

In preparation for the EPA, providers and employers should:

- read the Assessment Instructions sections before reaching Gateway – the EPA partnership managers can help with any queries
- review which completed **Recording Forms and evidence** must be submitted, and when
- use the Recording Forms provided in the format laid out, unless indicated otherwise
- plan the venue and resources required for EPA – make sure the assessment environment is secure and comfortable, without interruptions
- use the EPA Pro portal to help manage the apprentice's progress through EPA
- for on-site assessment: arrange for a designated contact to be available on the day to ensure the correct resources are available.

To help apprentices prepare for EPA, providers and employers should:

- explain the assessments and **Recording Forms** to the apprentice – refer to details in the Assessment Instructions sections of this pack
- agree a realistic timeframe for submission of evidence that meets the EPA deadlines – any delays in submission of evidence will delay the assessments
- make sure the apprentice has the resources and time to prepare for, and undertake EPA
- take the apprentice through some mock assessments
- share the [EPA Preparation Guide](#) with the apprentice. It includes information about system requirements for virtual meetings
- let ILM/City & Guilds know if reasonable adjustments are required to support an apprentice through the EPA. Information about ILM/City & Guilds access arrangements, including reasonable adjustments, is on the ILM/City & Guilds website, under [EPA Documents Library](#).

Authenticating the apprentice's work

The Independent End-point Assessor (IEPA) must ensure all decisions satisfy Validity, Authenticity, Currency and Sufficiency (VACS). For evidence produced outside controlled conditions, the apprentice will be required to:

- sign a declaration that the work is their own
- reference all sources.

The employer/provider should also aid authentication by:

- supplementary (oral) questioning to gauge familiarity with the topic
- looking out for any changes to the apprentice's usual writing style, unusual sources/examples or the use of US spellings or phrases that might indicate cutting and pasting from the internet
- requiring access to evidence of steps in the process, eg drafts, notes, planning etc.

ILM/City & Guilds have produced forms for use when reviewing evidence produced outside of controlled conditions. These forms include a Declaration of Authenticity Form which must be completed when submitting evidence. The forms are incorporated in the Recording Forms document.

ILM/City & Guilds Position Statement on Artificial Intelligence

The following guidance on Artificial Intelligence (AI) is designed to help candidates, teachers and assessors to complete NEAs, coursework and other internal assessments successfully. Please ensure familiarity with it.

[Position Statement on AI | City & Guilds](#)

Health & Safety and Codes of Practice

The importance of safe working practices, the demands of the Health and Safety at Work Act and any codes of practice associated with the industry **must** always be adhered to.

Following safe working practices is an integral part of all ILM/City & Guilds assessments, and it is the responsibility of the provider and employer to ensure that all the health and safety requirements are in place when apprentices are working on any projects or before apprentices begin any EPA.

Should an apprentice fail to follow correct health and safety practices and procedures during an EPA, the IEPA will consult with the EPA Team, and may advise the apprentice to stop and explain why.

Results submission and feedback

The IEPA will not provide feedback to the apprentice during or immediately following the assessment process. The provider will be informed by the City & Guilds EPA Team of the assessment results.

The IEPA will communicate the grade allocated for each assessment to the Lead Independent End-point Assessor (LIEPA) for quality assurance and sampling. The LIEPA will submit the results to the City & Guilds EPA Team.

Summary feedback will be provided to all apprentices after any grade determination has been carried out. The feedback will cover the areas against which insufficient evidence has been provided, leading to a 'Fail'. Our 'End-point Assessment Feedback' will also cover the areas against which the apprentice's evidence has resulted in the award of a Pass or Distinction.

If the apprentice has passed EPA, the City & Guilds EPA Team will issue the EPA Statement of Achievement to the provider, confirming the grade achieved and will notify the Institute for Apprenticeships and Technical Education (IfATE) who will issue the apprenticeship certificate.

Professional recognition

Upon successful completion of EPA, apprentices will be eligible to apply for professional membership with the Institute of Leadership.

City and Guilds of London Institute

On successful completion of these qualifications, learners will be awarded the prestigious designation of Affiliateship of the City and Guilds of London Institute and will be able to use the post-nominals **AfCGI** after their names. These post-nominals provide learners with professional recognition and provide additional validation for employers and clients of their capabilities and expertise. Learners will receive a digital certificate confirming their designation.

Statement of Achievement

A printed EPA Statement of Achievement will be issued to each successful apprentice.

Providers and employers with access can view and download PDF copies of the Statement 24 hours after the results are published. A PDF supports more efficient processing of funding claims by providing evidence of learner certification before the apprentice's paper certificate arrives.

The overall apprenticeship certificate will be issued by the IfATE.

Digital credentials

A digital credential is a verified, visual representation of knowledge and skills earned in various learning environments.

Digital credentials are issued and verified online, making it easy for individuals to demonstrate their competencies to employers, clients and peers online. Each digital credential has a unique URL that can be shared electronically via social media, in an email signature and on a CV. This is a complimentary service in addition to the paper certificate.



For further information, please visit the City & Guilds EPA Digital Credentials webpage and the general terms in respect of our privacy policy or contact: digitalsupport@cityandguilds.com.

2. The Apprenticeship Standard

The Occupational Role

This occupation is found in small, medium, large and multinational organisations in private, public and third sectors across all areas of the economy.

Operations managers perform leadership and management duties with teams and senior managers to ensure that teams fulfil their roles and meet organisational goals. They are essential to all business models that have an operational area or department with a workforce to lead, manage and support.

The broad purpose of this occupation is to provide leadership, with both operational and project responsibilities. An operations manager is responsible for managing individuals or a team, offering direction, instructions and guidance to achieve set goals. They are crucial for the smooth functioning of all departments within an organisation and ensure that their functions are administered and maintained in accordance with legislation and the organisation's policies and procedures. Operations managers provide clear and inclusive leadership and direction within their area of responsibility. This typically involves setting, managing and monitoring the achievement of core objectives aligned with the organisation's overall strategic goals. In smaller organisations, they are also likely to contribute to the execution and achievement of these strategic objectives.

In their daily work, an employee in this occupation interacts with colleagues from various internal departments, including operations, human resources, finance, legal, IT, sales and marketing, and project groups. Operations managers also engage with external stakeholders such as customers, clients and suppliers. They may work in diverse environments, including offices, onsite locations or remotely, demonstrating a high level of flexibility and adaptability to meet organisational needs.

An employee in this occupation is responsible for leading and managing their operational function. This includes being accountable for developing team members, managing projects, planning and reviewing workloads and resources, delivering operational plans, resolving problems and building relationships both internally and externally.

An operations manager may work as part of a network or in a team setting. They operate within agreed budgets and available resources, reporting to senior leaders. They are responsible for decision-making and guiding or influencing the decisions of others. This includes applying business continuity principles, collecting and interpreting data to identify trends, analysing resources and finding ways to improve efficiencies.

Operations managers understand how their role supports the broader organisational structure. They apply codes of practice, legislation and regulations relevant to their



organisation's operations. This encompasses legal and ethical responsibilities, as well as equity, diversity and inclusion, health and safety, and the sustainability impacts of the organisation.

Occupational Duties

This apprenticeship Standard has a number of duties which someone working in the role would typically be able to undertake. These duties are underpinned by a range of KSBs which a successful apprentice will be able to demonstrate.

Duty	KSBs
Duty 1 Provide leadership and people management.	K2 K3 K4 K6 K10 K12 K13 K14 K15 K16 K18 K19 K20 K22 K24 K25 S2 S3 S4 S6 S7 S14 S16 S17 S19 S20 S21 B1 B2 B3 B4 B5 B6
Duty 2 Keep up to date with IT and digital interventions such as Artificial Intelligence (AI) and software that can be used in their sector.	K5 K6 K8 K11 K15 K21 S8 S12 S15
Duty 3 Analyse, interpret and cascade data to enable tracking, trend analysis and metric reporting to enable decision making for managing objectives and targets.	K1 K4 K5 K6 K7 K8 K9 K13 K15 K16 K21 S1 S3 S4 S5 S8 S9 S10 S13 S16
Duty 4 Manage and influence activities and projects within budget and resources to deliver change and continuous improvement.	K6 K7 K9 K12 K13 K15 K17 S1 S2 S3 S4 S5 S8 S9 S10 S12 S16 S17 B1 B2 B3 B5 B6
Duty 5 Collaborate with and manage stakeholder relationships.	K3 K4 K6 K9 K10 K13 K14 K15 K16 K18 S1 S2 S6 S17 B1 B2 B6
Duty 6 Lead the creation and implementation of their resource plans considering future organisation needs and impact on change requirements.	K2 K3 K4 K6 K7 K8 K11 K15 K17 K18 K20 K22 K25 S1 S2 S5 S10 S13 S15 S21 B3
Duty 7 Interpret and comply with relevant legislation and regulation and the impact on their organisation.	K2 K3 K6 K18 K19 K22 K23 S1 S11 S13 S15

Duty	KSBs
Duty 8 Lead and manage the team to ensure the application of equity, diversity and inclusion principles.	K2 K3 K4 K8 K16 K18 K23 S2 S6 S7 S10 S11 S15 S17 B1 B2 B6
Duty 9 Lead the team and individual training needs and support continuous professional development.	K3 K4 K8 K20 K24 S2 S3 S4 S7 S10 S19 S20 B4 B6
Duty 10 Communicate complex information to build understanding and drive team and organisational performance.	K1 K13 K14 K25 S1 S16 S21
Duty 11 Manage activities which drive the organisation's sustainability goals.	K2 K6 K8 K11 K12 K15 K17 K19 K22 K23 S2 S3 S8 S9 S10 S11 S13 S15 S18 B5 B6
Duty 12 Build and manage internal relationships and collaborate with colleagues to enable cross-team working.	K3 K13 K14 K15 K16 K18 S1 S6 S16 S17 B1 B2 B6
Duty 13 Lead and respond to risk management, assessing the opportunities which could affect individual and team performance, and finding solutions that meet their needs.	K6 K8 K9 K10 K12 K15 K17 K18 K19 K21 S1 S2 S3 S8 S13 S14 B1 B5 B6
Duty 14 Develop and implement their operational plan that aligns with the strategic direction of the organisation.	K1 K4 K6 K7 K11 K15 K19 K23 K25 S1 S2 S3 S5 S10 S18 S21 B5

Knowledge, skills and behaviours

KSBs are mapped to the two assessment methods as indicated in the table below. Grading descriptors are provided in the assessment-specific sections of this document.

Ref.	Knowledge	Assessment method
K1	Presentation skills and methods.	Project with Report
K2	Relevant regulation and legislation requirements, and their impact on their team, the individual, their role and the organisation.	Professional Discussion underpinned by a Portfolio of Evidence
K3	Legislation and organisational policies relating to equity, diversity and inclusion in the workplace and their impact on the organisation and stakeholders.	Professional Discussion underpinned by a Portfolio of Evidence
K4	Approaches to people management, for example recruitment, performance management, reward, and talent management and resource planning.	Professional Discussion underpinned by a Portfolio of Evidence
K5	IT and software tools used to support the current and future needs of the organisation, including advances in technology.	Project with Report
K6	Methods for researching, analysing, interpreting and evaluating data to inform judgements and enable decision making.	Project with Report
K7	Financial management techniques and implications of decisions for budgets.	Project with Report
K8	How to identify and manage organisational improvement opportunities.	Project with Report
K9	Project management tools and techniques.	Project with Report
K10	Methods used to identify, manage and prioritise stakeholder relationships.	Project with Report
K11	The current and future needs of the sector and the impact on their organisation.	Project with Report

K12	Problem solving and decision-making techniques.	Project with Report
K13	Influencing and negotiation models and techniques.	Project with Report
K14	Conflict resolution and mediation processes.	Professional Discussion underpinned by a Portfolio of Evidence
K15	Communication techniques and approaches.	Project with Report
K16	Ethics and values-based leadership theories and principles, for example employee well-being.	Professional Discussion underpinned by a Portfolio of Evidence
K17	Change management concepts and methods for implementing change within the organisation.	Project with Report
K18	Leadership and management tools and techniques.	Professional Discussion underpinned by a Portfolio of Evidence
K19	The sector in which the organisation operates and its impact on their role.	Professional Discussion underpinned by a Portfolio of Evidence
K20	The continuous development requirements and learning needs of their team.	Professional Discussion underpinned by a Portfolio of Evidence
K21	Business continuity principles, including risk assessment, contingency planning and disaster recovery.	Professional Discussion underpinned by a Portfolio of Evidence
K22	Organisational policies and procedures, for example health and safety.	Professional Discussion underpinned by a Portfolio of Evidence
K23	Responsible organisation policies and practices covering social, environmental and economic factors, including sustainability.	Professional Discussion underpinned by a Portfolio of Evidence
K24	Coaching and mentoring techniques.	Professional Discussion underpinned by a Portfolio of Evidence

K25	The strategic direction of the organisation and the impact on operational plans.	Professional Discussion underpinned by a Portfolio of Evidence
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Ref.	Skills	Assessment method
S1	Communicate and present information to stakeholders using different types of media.	Project with Report
S2	Identify problems and provide solutions.	Project with Report
S3	Manage and set goals and accountabilities for individuals and teams.	Professional Discussion underpinned by a Portfolio of Evidence
S4	Analyse performance data for individuals and teams to identify areas for improvement.	Professional Discussion underpinned by a Portfolio of Evidence
S5	Manage and influence project activity to deliver within budget and resource requirements.	Project with Report
S6	Lead and influence the team and individuals to support an inclusive culture of equity, diversity and the promotion of well-being.	Professional Discussion underpinned by a Portfolio of Evidence
S7	Motivate team members and individuals through collaborative activities, for example one-to-one coaching and team meetings, to achieve organisational goals.	Professional Discussion underpinned by a Portfolio of Evidence
S8	Use digital tools to analyse information and monitor performance and budgets to drive the implementation and delivery of plans and projects.	Project with Report
S9	Research, interpret and analyse information to inform the implementation of business plans or projects.	Project with Report

S10	Evaluate the impact of outcomes from organisational plans or projects to drive the decision-making process.	Project with Report
S11	Interpret and implement the practical application of regulation, legislation and organisational policies for stakeholders.	Professional Discussion underpinned by a Portfolio of Evidence
S12	Manage continuous improvement and change for their team and organisation.	Project with Report
S13	Analyse and prioritise organisation activities in response to the operating environment.	Professional Discussion underpinned by a Portfolio of Evidence
S14	Implement business continuity plans, including risk assessment, contingency planning and disaster recovery, to ensure the uninterrupted operation of critical functions.	Professional Discussion underpinned by a Portfolio of Evidence
S15	Identify and respond to external factors that may influence the future landscape and evaluate their impact on the organisation.	Project with Report
S16	Influence and negotiate with stakeholders to shape and agree goals and outcomes.	Project with Report
S17	Manage relationships across multiple and diverse stakeholders.	Professional Discussion underpinned by a Portfolio of Evidence
S18	Deliver sustainable services and solutions which allow the organisation to respond to changes in social, economic and environmental factors.	Professional Discussion underpinned by a Portfolio of Evidence
S19	Manage and facilitate learning and continuous professional development for their team.	Professional Discussion underpinned by a Portfolio of Evidence

S20	Coach and mentor individuals within their team.	Professional Discussion underpinned by a Portfolio of Evidence
S21	Develop and implement operational plans that align with the strategic direction of the organisation.	Professional Discussion underpinned by a Portfolio of Evidence

Ref.	Behaviours	Assessment method
B1	Acts professionally, ethically and with integrity.	Professional Discussion underpinned by a Portfolio of Evidence
B2	Supports an inclusive culture, treating colleagues and stakeholders fairly and with respect.	Professional Discussion underpinned by a Portfolio of Evidence
B3	Takes accountability and ownership of their own and the team's tasks and workload.	Project with Report
B4	Seeks learning opportunities and continuous professional development for self and the wider team.	Professional Discussion underpinned by a Portfolio of Evidence
B5	Works flexibly and adapts to circumstances.	Project with Report
B6	Works collaboratively with others across the organisation and stakeholders.	Project with Report

Overall grade

This End-point Assessment is graded Fail, Pass, Distinction. The EPA will be assessed and graded by the IEPA.

Information about how each assessment is graded can be found in the Assessment Instructions sections of this pack. The apprentice will fail an assessment method if they do not meet the grading criteria.

The IEPA will individually grade the Project with Report and the Professional Discussion underpinned by a Portfolio of Evidence.

Apprentices who fail one or more assessment method will be awarded an overall EPA 'Fail'.

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

Performance in the EPA will determine the apprenticeship grade of Fail, Pass or Distinction.

To achieve an overall Pass, the apprentice must achieve at least a Pass in **all the assessment methods**, by meeting all the pass descriptors.

To achieve an overall Distinction, the apprentice must achieve a Distinction in **both assessment methods**, by meeting all the pass and distinction descriptors.

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

Assessment 1: Project with Report	Assessment 2: Professional Discussion underpinned by a Portfolio of Evidence	Overall grading
Fail	Fail	Fail
Fail	Pass	Fail
Pass	Fail	Fail
Pass	Pass	Pass
Pass	Distinction	Pass
Distinction	Pass	Pass
Distinction	Distinction	Distinction

The overall EPA grade will be capped at a Pass if the apprentice has had to resit or retake any assessment method, however the grade the apprentice has achieved for each component is not capped and will be identified on the Statement of Achievement.

Introduction and summary table

A full-time operations manager apprentice typically spends 24 months on programme. The apprentice must spend at least 12 months on programme and complete the required amount of off-the-job training in line with the apprenticeship funding rules.

The EPA should be completed within an **EPA period lasting typically five months.**

The apprentice must complete their training and meet the Gateway requirements before starting their EPA. The EPA will assess occupational competence.

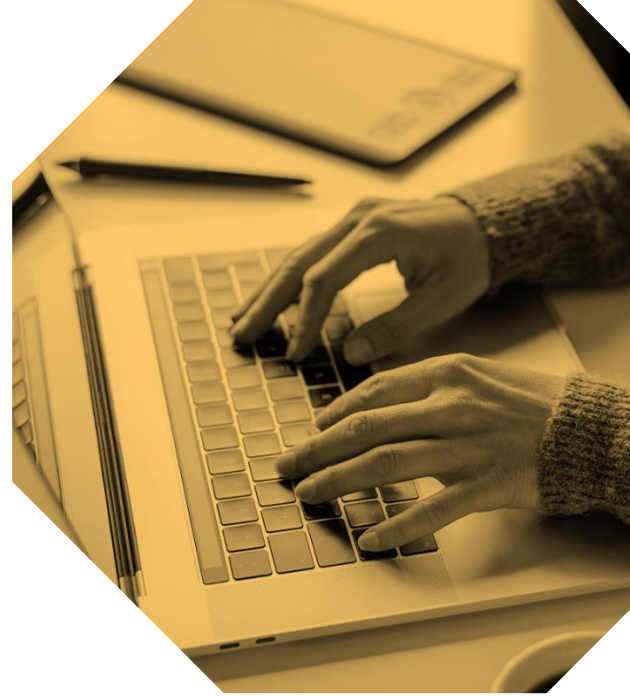
This EPA has two assessment methods:

Assessment method	Summary
Project with Report	<p>Written project report</p> <ul style="list-style-type: none"> 4,000 words +/-10% <p>Duration:</p> <p>Presentation with questioning must last 60 minutes, typically:</p> <ul style="list-style-type: none"> presentation of 20 minutes and questioning lasting 40 minutes. <p>Questions:</p> <p>The IEPA must ask at least six questions. Follow-up questions are allowed where clarification is required. *</p>
Professional Discussion underpinned by a Portfolio of Evidence	<p>Duration:</p> <p>Must last 60 minutes</p>

Assessment method	Summary
	<p>Questions:</p> <p>The IEPA must ask at least six questions. Follow-up questions are allowed where clarification is required. *</p>
<p>* For each assessment method, the IEPA can increase the total time by up to 10% to allow the apprentice to respond to a question or to complete their last point if necessary.</p>	

3. Gateway

The EPA period will only start when the **employer** is satisfied that the apprentice is consistently working at, or above the level of, the Standard. The apprentice must be able to evidence that they fully demonstrate the Occupational Standard and required level of professional competence in an authentic workplace context. In making this decision, the employer could take advice from the provider, but the ultimate decision is made solely by the employer.



If there is a **provider** working alongside the employer, they should support the apprentice's preparation for Gateway.

The apprentice must provide the following at Gateway:

- English and mathematics qualifications in line with the apprenticeship funding rules
- a portfolio of evidence for the professional discussion.

The following should be completed on the EPA Pro platform:

- Gateway Declaration Form signed by the apprentice
- Gateway Declaration by the provider, on behalf of the employer and tutor, confirming that the apprentice has completed at least 12 months on programme
- Gateway Declaration by the employer, supported by the training provider, confirming that the project was completed on programme, is a significant and defined piece of work that has real business application and benefit, and is relevant to the apprentice's occupation and apprenticeship.

ILM/City & Guilds will confirm when all the Gateway requirements have been met.

The Assessment Instructions sections provide details about the evidence that must be submitted at Gateway.

4. Timetable for End-point Assessment

The EPA period is typically completed within five months of the EPA Gateway, starting when ILM/City & Guilds has confirmed that all Gateway requirements have been met.



Further information about the booking process and timelines can be found in the [ILM/City & Guilds Manual for the End-point Assessment Service](#).

Planning meetings are optional for this Standard. The EPA partnership managers can provide additional guidance.

Ongoing during on programme	Evidence and forms
<p>Provider and employer</p> <ul style="list-style-type: none"> Reviews progress as part of their regular performance management process and ensures apprentice's performance is on track Identifies any gaps and creates a plan with the apprentice Enrols apprentice on EPA Pro and provides 'Expected Date Ready for EPA' and (optional) 'Preferred Planning Meeting Date' 	N/A
<p>Apprentice</p> <ul style="list-style-type: none"> Complete training to develop the KSBs outlined in this apprenticeship Standard Complete training towards, or provide evidence of, English and mathematics qualifications in line with the apprenticeship funding rules Compile a portfolio of evidence 	<p>Start to collate:</p> <ul style="list-style-type: none"> Portfolio of evidence English and mathematics certifications

Gateway process	Evidence and forms
<p>Employer</p> <ul style="list-style-type: none"> • Reviews progress and ensures the apprentice is ready for the EPA • Reviews evidence to confirm that it is appropriate and sufficient to meet the Standard • Confirms that the project was completed on programme, is a significant and defined piece of work that has real business application and benefit, and is relevant to the apprentice's occupation and apprenticeship • Attends the optional EPA planning meeting 	<ul style="list-style-type: none"> • Declaration of Authenticity • Project Declaration Form
<p>Apprentice</p> <ul style="list-style-type: none"> • Attends the optional EPA planning meeting • Must have been on programme for a minimum of 12 months • Completes and submits evidence and forms 	<p>Submits to provider:</p> <ul style="list-style-type: none"> • Apprentice Gateway Declaration • Portfolio of evidence • English and mathematics certifications
<p>Provider – on EPA Pro</p> <ul style="list-style-type: none"> • Books EPA on the EPA Pro portal, in line with ILM/City & Guilds booking timelines in the EPA Manual • Makes ILM/City & Guilds aware of any additional needs of the apprentice so that they can review reasonable adjustments – see the current policy on the ILM/City & Guilds website, under EPA Documents Library • Completes Provider Gateway Declaration on behalf of the employer and tutor • Uploads evidence and forms onto EPA Pro 	<p>Completes on EPA Pro:</p> <ul style="list-style-type: none"> • Provider Gateway Declaration • (Optional) Preferred Planning Meeting Date form (on behalf of the employer) <p>Signs:</p> <ul style="list-style-type: none"> • Declaration of Authenticity <p>Uploads onto EPA Pro:</p> <ul style="list-style-type: none"> • Apprentice Gateway Declaration • Portfolio of evidence • Portfolio of Evidence

Gateway process	Evidence and forms
	Matrix
IEPA <ul style="list-style-type: none"> Attends the optional EPA planning meeting 	Creates: The assessment plan on EPA Pro
City & Guilds EPA Gateway Team <ul style="list-style-type: none"> Formally confirms when all the Gateway requirements have been met Amend/re-arrange EPA events as required and agreed with EPA Gateway Team and EPA Team 	N/A
City & Guilds EPA Team <ul style="list-style-type: none"> Agrees with the provider and IEPA a mutually convenient date for the optional EPA planning meeting Or Agrees with the provider and IEPA a mutually convenient date for the EPA events 	N/A
End-point Assessment	Evidence and forms
Apprentice <ul style="list-style-type: none"> Submits evidence post Gateway Completes End-point Assessments 	Submits to provider: <ul style="list-style-type: none"> Written project report and presentation EPA Recording Form
Employer <ul style="list-style-type: none"> Ensures the apprentice has access to the resources required for the assessments (see the Resources section) 	Submits to provider: <ul style="list-style-type: none"> Declaration of Authenticity
Provider <ul style="list-style-type: none"> Submits evidence for the written project report and presentation and forms by end of week 12 of the EPA period 	Uploads onto EPA Pro: <ul style="list-style-type: none"> Written project report and presentation EPA Recording Form

Gateway process	Evidence and forms
	incorporating the Declaration of Authenticity
<p>IEPA</p> <ul style="list-style-type: none"> • Reviews the portfolio of evidence, written project report and presentation prior to the EPA events • Carries out End-point Assessments • Grades each assessment, communicates the results to the LIEPA • Provides feedback for assessments in EPA Pro 	<p>Completes:</p> <ul style="list-style-type: none"> • Recording forms • Feedback forms
<p>LIEPA</p> <ul style="list-style-type: none"> • Samples and quality assures assessments according to the LIEPA sampling strategy • Confirms overall grade to EPA Team 	<p>Reviews:</p> <ul style="list-style-type: none"> • Project Report Recording Form • Professional Discussion Recording Form • End Point Assessment Feedback Form • Publishes the grade in EPA Pro
<p>City & Guilds EPA Team</p> <ul style="list-style-type: none"> • Communicates the results to the provider via EPA Pro • Processes the overall result if the apprentice has passed all the assessments and advises IfATE, who issue the certificate. The data will be provided to IfATE once a month, on the fourth working day of the month 	<p>N/A</p>

Summary timescales

Readers should check the above timetable and the Assessment Instruction sections of this document for the detailed requirements for each stage.

Further information on EPA Service timelines can be found on www.cityandguilds.com.

On programme

Enrol apprentice on EPAPro including 'expected date ready for EPA'. The apprentice must:

- complete training to develop the KSBs outlined in this apprenticeship's Standard
- complete training towards English and mathematics qualifications in line with the apprenticeship funding rules
- compile a portfolio of evidence

Gateway process

Provider submits evidence and forms on EPAPro and provides (optional) planning meeting dates. The apprentice must:

- have achieved English and mathematics qualifications in line with the apprenticeship funding rules
- have completed an on-programme project which will form the basis of their written project report in the EPA
- submit a portfolio of evidence for the Professional Discussion

The employer, supported by the training provider, must confirm that the project was completed on programme, is a significant and defined piece of work that has real business application and benefit, and is relevant to the apprentice's occupation and apprenticeship.

Gateway

Assessment components can only be booked after Gateway has been approved

Planning meeting

Planning meeting (optional) a minimum of 10 working days after Gateway

Project report

The apprentice must complete and submit the written project report and any presentation materials to ILM/City & Guilds by the end of week 12 of the EPA period. The IEPA must have at least two weeks to review the submitted evidence. The apprentice must be given at least two weeks' notice of the presentation with questions.

Professional Discussion

The apprentice must be given two weeks' notice of the Professional Discussion. The IEPA must have at least two weeks to review the portfolio of evidence.

End-point Assessment completed

5. End-point Assessment resources

Assessment method	Resources required
Project with Report	<ul style="list-style-type: none"> • Access to a computer with video-conferencing software which is tested prior to the assessment starting. The video-conferencing software will be advised at point of booking.
	<ul style="list-style-type: none"> • Quiet room, free from distractions and interruptions
Professional Discussion underpinned by a Portfolio of Evidence	<ul style="list-style-type: none"> • Access to a computer with video-conferencing software which is tested prior to the assessment starting. The video-conferencing software will be advised at point of booking.
	<ul style="list-style-type: none"> • Quiet room, free from distractions and interruptions

6. Assessment information: 9309-706 Project with Report

Overview

This assessment method includes two components:

- written project report
- presentation with questions.

Rationale

This assessment method is being used because:

- it allows for the assessment of KSBs that take place over a long period of time
- it allows for a broad set of KSBs to be evidenced during the post-Gateway period
- it assesses KSBs holistically
- it can produce something that is of genuine business benefit to the apprentice's employer
- it allows the apprentice to directly demonstrate KSBs relating to communication and presentation
- the written project report is designed to demonstrate the application of knowledge, skills and behaviours as they would occur in occupational practice. Producing a written project report reflects normal practice in the workplace for an operations leader, so this assessment method is appropriate for this occupation
- it demonstrates the apprentice's understanding of their organisation and department.

Number of questions	<ul style="list-style-type: none">• The IEPA must ask at least six questions• Follow up questions are allowed where clarification is required
Grading	<ul style="list-style-type: none">• Fail/Pass/Distinction
Duration	<ul style="list-style-type: none">• The presentation with questions must last 60 minutes• This will typically include a presentation of 20 minutes and questioning lasting 40 minutes• The IEPA can increase the total time of the presentation and questioning by up to 10%
Marking	<ul style="list-style-type: none">• The IEPA must make the grading decision
Permitted materials	<ul style="list-style-type: none">• N/A

Location

- The presentation with questions will be conducted by video conferencing

Assessment Specification

Overview – Component 1 project with report

This assessment method has two components:

- written project report
- presentation with questions and answers.

Together, these components give the apprentice the opportunity to demonstrate the KSBs mapped to this assessment method. They are assessed by an independent assessor.

The apprentice must complete a written project report. This involves the apprentice completing a significant and defined piece of work that has a real business application and benefit. The written project report must meet the needs of the employer's business and be relevant to the apprentice's occupation and apprenticeship.

Written project report with presentation and questions – requirements

For the written project report with presentation and questions, the employer, supported by the training provider, must confirm that the project completed on programme is a significant and defined piece of work that has real business application and benefit, and is relevant to the apprentice's occupation and apprenticeship. The Project Declaration Form, available within the **Recording Forms** document, must be submitted at Gateway.

The written project report will present a typical business task, appropriate for demonstrating the skills and knowledge in the Occupational Standard. The project completed on programme will be comparable in terms of content and complexity for all apprentices; it is the context within which the knowledge and skills must be demonstrated that will vary. The project will typically take six months for the apprentice to complete. It will typically be undertaken on the employer's premises or, where this is not practical, on the training provider's premises.

Delivery

Examples of types of projects that could be used for the apprentice's written project report are:

- introduction of a new process, service or product to the operational area
- identification and implementation of a change plan to improve efficiency or direct saving (eg percentage decrease in direct costs, reduction in headcount)
- implementation of a performance improvement plan for the operational area that required significant collaboration with wider stakeholders

- evaluation of an internal communications project that involved communicating change to different stakeholders.

The written project report output must be in the form of a report and presentation.

The apprentice must start the written project report after Gateway. The employer should ensure the apprentice has the time and resources, within the written project report period, to plan and complete their report. The research and project will be completed on programme and before Gateway.

The apprentice may work as part of a team to complete the project, which could include internal colleagues or technical experts. The apprentice must however complete their written project report and presentation unaided, and they must be reflective of their own role and contribution. The apprentice and their employer must confirm this when the written project report and any presentation materials are submitted, filling in the Project Report Declaration of Authenticity Form available within the **Recording Forms** document.

The report must include at least:

- an executive summary
- an introduction
- the scope and business need of the project (including key performance indicators, aims and objectives)
- research and analysis outcomes
- project outcomes – did it deliver the benefits included? was it completed to time and cost?
- discussion of findings
- recommendations and conclusions
- references – from external resources
- appendix containing mapping of KSBs to the report.

The written project report must have a word count of **4,000 words**. A tolerance of 10% above or below is allowed at the apprentice's discretion. Appendices, references and diagrams are **not** included in this total. The apprentice must produce and include a mapping in an appendix, ie the Written Project Report and Presentation Matrix within the **Recording Forms** document, showing how the report evidences the KSBs and grading descriptors mapped to this assessment method.

Note: The submission of a fully completed Written Project Report and Presentation Matrix is mandatory. Failure to do so means that the IEPA will return the written project report and presentation without being reviewed.

In the case where the evidence has been referenced in the Written Project Report and Presentation Matrix but it is not present within the documentation provided, the IEPA will request the missing evidence from the provider.

Any written project report submitted with a word count outside of these requirements, or submitted without showing an accurately calculated total word count, will be dealt with as follows:

- written project report submitted with fewer than 3,600 accurately calculated words will be assessed as submitted; there is no specific penalty for failing to meet the minimum word count requirement. However, apprentices are to be reminded that this shortfall is likely to reduce their opportunity to pass and achieve a higher grade.
- written project report submitted with more than 4,400 accurately calculated words will be assessed as submitted. However, the IEPA will only consider the first 4,400 words and will not assess any content beyond this limit against the grading criteria. There is no specific penalty for exceeding the maximum word count requirement. However, apprentices are to be reminded that this is likely to reduce their opportunity to pass and achieve a higher grade, especially where recommendations and conclusions are included towards the end of the submitted report.

Overview – Component 2 presentation with questions

The presentation with questions must be structured to give the apprentice the opportunity to demonstrate the KSBs mapped to this assessment method to the highest available grade.

The apprentice must prepare and deliver a presentation to an IEPA. The presentation should cover:

- an analysis of the internal and external factors that impacted the choice of project
- a critical evaluation of the project activity justifying the reason for the project
- detail of the impact the project has had since it was completed.

The apprentice must complete and submit the written project report and any presentation materials to ILM/City & Guilds by the **end of week 12** of the EPA period. The apprentice must notify the ILM/City & Guilds, at that point, of any technical requirements for the presentation.

The apprentice must be given at least two weeks' notice of the presentation with questions. After the presentation, the IEPA must ask the apprentice questions about their project, written project report and presentation.

Duration

The presentation with questions must last **60 minutes**. This will typically include a presentation of **20 minutes** and questioning lasting **40 minutes**. The IEPA must use the full time available for questioning. The IEPA can increase the time of the presentation and questioning by up to **10%**. This time is to allow the apprentice to complete their last point or respond to a question if necessary.

The apprentice may choose to end the assessment method early. The apprentice must be confident they have demonstrated competence against the assessment requirements for the assessment method.

The IEPA must ask at least **six** questions. Follow up questions are allowed where clarification is required.

The purpose of the IEPA's questions is:

- to verify that the activity was completed by the apprentice
- to seek clarification where required
- to assess those KSBs that the apprentice did not have the opportunity to demonstrate with the report, although these should be kept to a minimum
- to assess level of competence against the grading descriptors.

Assessment location

During the presentation, the apprentice must have access to:

- audio-visual presentation equipment
- a flip chart and writing and drawing materials
- a computer.

The presentation with questions can be conducted by video conferencing. It should take place in a quiet room, free from distractions and influence.

ILM/City & Guilds have processes in place to verify the identity of the apprentice and ensure the apprentice is not being aided. Face-to-face assessments can be arranged via the EPA Partnership Manager.

Grading

This assessment method is graded:

- Fail
- Pass
- Distinction

The two assessments components, written project report and presentation with questions, will be graded holistically.

Fail means the apprentice does not meet the pass criteria.

To achieve a Pass, the apprentice must demonstrate all of the pass descriptors.

To achieve a Distinction, the apprentice must demonstrate all of the pass descriptors and all of the distinction descriptors.

7. Assessment instructions: 9309-707 Professional Discussion underpinned by a Portfolio of Evidence



Overview

This assessment method comprises a professional discussion underpinned by a portfolio of evidence.

Rationale

This assessment method is being used because:

- it assesses KSBs holistically and objectively
- it allows for the assessment of KSBs that do not occur on a predictable or regular basis
- it allows for assessment of responses where there are a range of potential answers
- it can be conducted remotely, potentially reducing cost.

Number of questions	<ul style="list-style-type: none">• The IEPA must ask at least six questions• Follow up questions are allowed where clarification is required
Grading	<ul style="list-style-type: none">• Fail/Pass/Distinction
Duration	<ul style="list-style-type: none">• The professional discussion must last 60 minutes• The IEPA can increase the total time of the professional discussion by up to 10%
Marking	<ul style="list-style-type: none">• The IEPA must make the grading decision
Permitted materials	<ul style="list-style-type: none">• The apprentice must have access to their portfolio of evidence during the professional discussion
Location	<ul style="list-style-type: none">• The professional discussion will be conducted by video conferencing

Assessment Specification

Overview

In the professional discussion, an IEPA and apprentice have a formal two-way conversation. It gives the apprentice the opportunity to demonstrate the KSBs mapped to this assessment method.

The apprentice can refer to and illustrate their answers with evidence from their portfolio of evidence.

Portfolio of evidence

The apprentice **must** compile a portfolio of evidence during the on-programme period of the apprenticeship. It should only contain evidence related to the KSBs that will be assessed by the professional discussion. It will typically contain **16 discrete pieces of evidence**.

Evidence must be mapped against the KSBs using the Portfolio of Evidence Matrix Form within the **Recording Forms** document. Evidence may be used to demonstrate more than one KSB; a **qualitative** as opposed to quantitative approach is suggested.

Evidence sources may include:

- workplace documentation and records, for example:
- workplace policies and procedures
- witness statements
- annotated photographs
- video clips with a maximum total duration of five minutes; the apprentice must be in view and identifiable.

This is not a definitive list; other evidence sources can be included.

The portfolio of evidence should **not** include reflective accounts or any methods of self-assessment.

Any employer contributions should focus on direct observation of performance, for example witness statements, rather than opinions. The evidence provided should be valid and attributable to the apprentice. The portfolio of evidence should contain a statement from the employer and apprentice confirming this. The required statement is included in the Portfolio Declaration of Authenticity Form, within the **Recording Forms** document.

The completed portfolio, including the Declaration of Authenticity and Portfolio of Evidence Matrix must be submitted at Gateway.

Note: The submission of a fully completed Portfolio of Evidence Matrix is mandatory. Failure to do so means that the IEPA will return the portfolio without being reviewed.

In the case where the evidence has been referenced in the Portfolio of Evidence Matrix but is not present within the documentation provided, the IEPA will request the missing evidence from the provider.

The IEPA will not assess the portfolio of evidence directly as it underpins the professional discussion. The IEPA will review the portfolio of evidence to prepare questions for the professional discussion. They are not required to provide feedback after this review.

Recommended approach for portfolio submission

A portfolio will typically comprise 16 pieces of evidence. A piece of evidence may:

- be an individual document, such as a Word file, or
- be organised into a folder where documents are combined to support a specific piece of product evidence (eg a spreadsheet with a Word document providing context).

It is advised that each folder contains no more than two documents.

Delivery

The professional discussion must be structured to give the apprentice the opportunity to demonstrate the KSBs mapped to this assessment method to the highest available grade.

An IEPA will conduct and assess the professional discussion.

The purpose is to assess the apprentice's competence against the following themes:

- Managing and leading a team
- Organisational governance
- Operational planning
- Stakeholder relationships

ILM/City & Guilds must give an apprentice two weeks' notice of the date of the professional discussion.

The apprentice must have access to their portfolio of evidence during the professional discussion.

The apprentice can refer to and illustrate their answers with evidence from their portfolio of evidence, however, the portfolio of evidence is not directly assessed.

Duration

The professional discussion **must last for 60 minutes**. The IEPA can increase the time of the professional discussion by up to 10%. This time is to allow the apprentice to respond to a question if necessary.

The apprentice may choose to end the assessment method early. The apprentice must be confident they have demonstrated competence against the assessment requirements for the assessment method.

The IEPA **must ask at least six questions**. Follow up questions are allowed where clarification is required.

Assessment Location

The professional discussion will be conducted by video conferencing. ILM/City & Guilds have processes in place to verify the identity of the apprentice and ensure the apprentice is not being aided. Face-to-face assessments can be arranged via the EPA Partnership Manager.

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

Grading

This assessment method is graded:

- Fail
- Pass
- Distinction

Fail means the apprentice does not meet the pass criteria.

To achieve a Pass, the apprentice must demonstrate all of the pass descriptors.

To achieve a Distinction, the apprentice must demonstrate all of the pass descriptors and all of the distinction descriptors.

8. Resits and retakes

Apprentices who fail one or more assessments will be offered the opportunity to take a resit or retake:

- A resit is where the apprentice takes the assessment again without the need for new learning.
- A retake is where the employer determines new learning is needed first.



If the apprentice fails one assessment method or more, they can take a resit or a retake at their employer's discretion. The apprentice should have a supportive action plan to prepare for a resit or a retake.

The employer and the IEPA should agree the timescale for a resit or retake. A resit is typically taken within two months of the EPA outcome notification. The timescale for a retake is dependent on how much re-training is required and is typically taken within three months of the EPA outcome notification. Failed assessment methods must be resat or retaken within a six-month period from the EPA outcome notification, otherwise the entire EPA will need to be resat or retaken in full.

Resits and retakes are not offered to an apprentice wishing to move from a Pass to a higher grade. The apprentice will get a maximum overall EPA grade of a Pass if they need to resit or retake one or more assessment methods unless ILM/City & Guilds determines there are exceptional circumstances.

9309-706 Project with Report

If the apprentice fails the project assessment method, they must amend the project output, ie the written report and presentation, in line with the independent assessor's feedback. The apprentice will be given four weeks to rework and submit the amended materials.

The presentation with questions will be carried out in the same way as the original assessment. The IEPA will use a different set of questions.

In the event of a resit/retake, the apprentice must submit a new set of recording forms, which must indicate any additional and/or amended evidence.

9309-707 Professional Discussion underpinned by a Portfolio of Evidence

If the apprentice fails the professional discussion underpinned by a portfolio of evidence, they may choose to submit additional and/or amended evidence against the failed KSBs and

grading descriptors **only**. This could be a mixture of new evidence and evidence previously submitted. It is **not** necessary to resubmit the full portfolio.

Additional/amended evidence must be clearly referenced on the Portfolio of Evidence Matrix Form. During the professional discussion resit/retake, the apprentice will need to demonstrate the descriptors (Pass/Distinction) they previously met, not just the descriptors they failed during the original assessment.

The professional discussion will be carried out in the same way as the original assessment. The IEPA will question the apprentice on whole subject area using a different set of questions.

In the event of a resit/re-take, the apprentice must submit a new set of recording forms, which must indicate any additional and/or amended evidence.

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- whilst the portfolio of an Apprentice may contain EPA assessment results referenced to the EPA assessment taken from time to time, they do not at any time contain the EPA Assessment Materials, unless otherwise stated in the individual Apprenticeship Standard; and
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- provide access, on request, to City & Guilds to any system(s) on which any EPA Assessment Materials appear, are stored or delivered from time to time.

9309-706 Project Report: Themes, KSBs and grading descriptors

Theme KSBs	Pass	Distinction
<p>Project scope and planning</p> <p>K6 K8 K10 K11 K17 S2 S15 S16</p>	<p>Explains how they identify problems and use methods for researching, analysing, interpreting and evaluating data to inform judgements and provide solutions. (K6, S2)</p>	<p>Evaluates the impact of their approach to influencing and negotiating with stakeholders to shape and agree goals and outcomes when identifying and managing organisational improvement opportunities. (K8, S16)</p>
	<p>Explains how they manage and prioritise stakeholder relationships and influence and negotiate with stakeholders to shape and agree goals and outcomes when identifying and managing organisational improvement opportunities. (K8, K10, S16)</p>	
	<p>Describes the change management concepts and the methods they use to implement change within their organisation in line with the project brief. (K17)</p>	
	<p>Explains how they identify the current and future needs of the sector and respond to any external factors that may influence the future landscape</p>	

	and evaluates their impact on the organisation. (K11, S15)	
Theme KSBs	Pass	Distinction
Project implementation K5 K7 K9 K12 K13 S5 S8 S9 S12 B3 B5 B6	Explains how they use IT and software tools to support the needs of the organisation, including advances in technology, and use digital tools to analyse information and monitor performance and budgets to drive the implementation and delivery of plans and projects. (K5, S8)	Evaluates the impact of the project and financial management techniques they have used to deliver projects within resource requirements, suggesting improvements to facilitate the success of future projects. (K7, K9, S5) Evaluates their approach to managing continuous improvement and change within the project. (S12)
	Explains how they apply project and financial management tools and techniques to manage and deliver projects within budget and resource requirements, taking accountability and ownership of their own and the team's tasks and workload. (K7, K9, S5, B3)	
	Outlines the problem solving, decision making, influencing, and negotiating models and techniques they used in the project. (K12, K13)	
	Explains how they work collaboratively with others to research, interpret, and analyse information which informs the implementation of business plans or projects. (S9, B6)	

	Explains how they work flexibly and adapt to change when managing continuous improvement and change for their team and organisation. (S12, B5)	
Theme KSBs	Pass	Distinction
Evaluation and recommendations K1 K15 S1 S10	Selects and applies different communication techniques and methods to present information to stakeholders. (K1, K15, S1)	N/A
	Evaluates the impact of outcomes from organisational plans or projects to drive the decision-making process. (S10)	

9309-707 Professional Discussion: Themes, KSBs and grading descriptors

Theme KSBs	Pass	Distinction
<p>Managing and leading a team</p> <p>K4 K14 K16 K18 K20 K24 S3 S4 S7 S19 S20 B1 B4</p>	<p>Analyses performance data for individuals and teams to identify areas for improvement, continuous development requirements and learning needs. (K20, S4)</p>	<p>Critically evaluates their people management approach to motivating team members and individuals. (K4, S7)</p>
	<p>Proactively seeks, manages and facilitates learning opportunities and continuous professional development for themselves and their wider team. (S19, B4)</p>	<p>Evaluates the impact coaching and mentoring techniques have on individuals in their team. (K24, S20)</p>
	<p>Evaluates how their use of leadership and management tools and techniques helps them to lead and manage a team ethically, set goals and accountabilities, and mediate and resolve any conflicts. (K14, K16, K18, S3, B1)</p>	
	<p>Outlines the people management techniques and collaborative activities they use to coach, mentor and motivate</p>	

	individuals in their team to achieve organisational goals. (K4, K24, S7, S20)	
Theme KSBs	Pass	Distinction
Organisational governance K2 K3 K22 S6 S11	Applies organisational policies and procedures, and relevant regulatory and legislative requirements, while considering their impact on the team, the individual, their role and the organisation, and interprets and communicates the practical implications of these for stakeholders. (K2, K22, S11)	Evaluates their approach to supporting, delivering and promoting equity, diversity, inclusion and well-being in terms of impact on the workplace. (K3, S6)
	Proactively applies organisational policies and legislative guidelines to lead and influence the team and individuals to support an inclusive culture of equity, diversity, and the promotion of well-being. (K3, S6)	
Theme KSBs	Pass	Distinction
Operational planning K19 K21 K23 K25 S13 S14 S18 S21	Analyses and prioritises organisational activities in response to the operating environment and the impact this has on their role. (K19, S13)	Evaluates the extent to which business continuity principles they apply have ensured the

	<p>Justifies the business continuity principles they apply to ensure the uninterrupted operation of critical functions. (K21, S14)</p>	<p>uninterrupted operation of critical functions. (K21, S14)</p>
	<p>Explains how organisation policies and practices were followed to deliver sustainable services and solutions which enable the organisation to respond to changes in social, economic and environmental factors. (K23, S18)</p>	<p>Evaluates the extent to which organisation policies and practices followed to deliver sustainable services and solutions enabled the organisation to respond to changes in social, economic and environmental factors. (K23, S18)</p>
	<p>Evaluates the degree to which operational plans they have developed and implemented align with the strategic direction of the organisation. (K25, S21)</p>	
Theme KSBs	Pass	Distinction
<p>Stakeholder relationships</p> <p>S17 B2</p>	<p>Explains how they manage relationships across multiple and diverse stakeholders, ensuring they are treated fairly, inclusively and with respect. (S17, B2)</p>	<p>Evaluates the impact of their approach to managing stakeholder relationships and recommends improvements. (S17, B2)</p>

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Who we are

As part of the City & Guilds Group, we believe in a world where people and organisations have the confidence and capabilities to prosper, today and in the future.

As workplaces evolve, so do we. That's why we set the standard for skills that transform lives, industries, and economies.

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Founded in 1878 to develop the knowledge, skills, and behaviours needed to help businesses thrive, we offer a broad and imaginative range of products and services that help people achieve their potential through workbased learning. We believe in a world where people and organisations have the confidence and capabilities to prosper, today and in the future. So we work with like-minded partners to develop the skills that industries demand across the world.

City and Guilds Group

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