
Level 6 End-point Assessment for ST0272/AP03 for Chartered Manager Degree Apprenticeship

9310-12

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End-point Assessment Customer Pack

For Centres/End-point Assessment Customers/ Employers/Higher
Education Institutions

Version and date	Change detail	Section
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3.1 March 2022	Added note about Panel Interview Form	Page 39
3.2 May 2022	Updated throughout, including 20% sampling of portfolio.	Throughout
3.3 January 2023	Revised timing for interview to 2½ hours	P38
4.0 June 2023	Amended interview guidance to remove references to panel and face to face format Added guidance on e-portfolios	Throughout
5.0 March 2024	Information brought into line with the Evidence Matrix	Section 6: Guidance for each End-point Assessment

This document is intended for Customers of ILM and City & Guilds. This guide is subject to regular revision, and maintained electronically. Please refer to the ILM website for the most up to date information. Electronic copies are version controlled.

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Section 1: Introduction

About this Apprenticeship Occupation

This End-point Assessment (EPA) pack has been designed to assess all the requirements of the Level 6 Chartered Manager Degree Apprenticeship Standards and Assessment Plan ST0272/AP03. This apprenticeship is for professional managers who take lead responsibility for people, projects, operations and/or services to deliver long term organisational success. It is applicable to managers from all sectors - the private, public or third sector - and all sizes of organisation. It will typically take 4 years to complete, although the exact duration will depend on the previous experience of the individual.

The Role

This apprenticeship has been designed to provide access to development opportunities for as wide a range of individuals as possible. This includes individuals who are at the start of their career and who wish to become professional managers and achieve professional recognition once they have passed their EPA, as well as those who may already have developed practical experience but who wish to develop their understanding of management skills further.

Occupation /Profile: Professional managers in the private, public or third sector and all sizes of organisation. Specific job roles may include: Manager; Senior Manager; Head of Department; Operations Manager; or anyone with significant management responsibilities.

- Professional managers capable of managing complexity and delivering impact at a strategic and/or operational level with management and leadership responsibility for setting and delivering organisational objectives through a wide range of functions.
- Professional managers who want to develop fully all aspects of their management and leadership skills, knowledge, self-awareness and behaviours. These include strategic decision making, setting direction and achieving results, building and leading teams, clear communication, developing skills and motivating others, fostering inclusive and ethical cultures, leading change, project management, financial management, innovation, risk management, and developing stakeholder relationships.

Who is this document for?

This document is for providers including Higher Education Institutions (HEIs) and employers wishing to use the EPA service for the Standard. This means the HEI has apprentices registered on the apprenticeship.

Gateway – prior to End-point Assessment

The Gateway process is designed to provide an opportunity for the employer/tutor to review progress of the apprentice and confirm that they are eligible for carrying out End-point assessment. The employer/tutor will review the apprentice's achievements to date, ensuring that all entry requirements have been met and that the apprentice is proficient in all areas of the standard.

On completion of the Gateway process, the apprentice will be required to sign an **Apprentice Gateway Declaration Form**. This form should be submitted as part of the Gateway process in the EPA Pro portal. A copy of this form can be found in the Support Resources section on the EPA Pro portal. The provider will be required to make a declaration and electronic signature on behalf of the employer and provider/tutor in the EPA Pro portal.

Entry requirements for End-point Assessment

To be eligible for EPA the apprentice must have successfully achieved the following at Gateway:

- On-programme part of the apprenticeship, including knowledge, skill and behavioural assessment as part of an HEI Degree in management and business. The apprentice will have compiled a portfolio and completed a work-based project.
- Apprentices will also have achieved GCSE or Level 2 Functional Skills qualifications in English and Maths. Evidence of successful completion must be provided when booking EPA.

The management degree must be awarded by an HEI. UK HEIs must follow the Quality Assurance Agency for Higher Education (QAA) Code of Practice.

End-point Assessments

The focus of EPA is for the apprentice to fully demonstrate the knowledge, skills and behaviours set out in the apprenticeship standard and to be able to demonstrate this level of professional competence in authentic workplace contexts.

EPA are formal summative assessments that conclude an apprenticeship programme. Each apprenticeship will be assessed in a number of ways to provide a clear indication of the apprentice's knowledge, skills and behaviour. For this apprenticeship the following three EPAs must be passed:

- Portfolio
- Work-Based Project
- Interview – including a Presentation, and Question & Answer session

The IEPA receives a copy of the apprentice's portfolio and work-based project for assessing ahead of the interview. The portfolio and work-based project are remotely reviewed by the IEPA, assessed and marked to confirm that there is sufficient evidence that the apprentice's learning has been applied, and that they have demonstrated all the knowledge, skills and behaviours in the Standard.

The apprentice then makes presentation to the IEPA about the outcomes of their work based project, and they will be asked clarification and testing questions in a competency based format.

The IEPA reviews all submissions to assess whether the apprentice meets the Standards to ensure that the apprentice has demonstrated the full range of knowledge, skills, and behaviours.

Guidance on the EPAOs Policies can be found on the [City & Guilds website](#).

Recognition of prior learning (RPL)

Recognition of Prior Learning may not be used as a substitute for EPA.

Grading

This apprenticeship is graded Pass, Merit, and Distinction.

Final judgement

The IEPA will make the final judgement as to whether the apprentice has met the requirements of the Standard. The IEPA's decision will be sampled and quality assured by the Lead Independent End-point Assessor (LIEPA).

City & Guilds of London Institute

Apprentices who pass their EPA are eligible for Graduateship membership of City & Guilds of London Institute, which includes use of post-nominals. Further information about the process for claiming membership is available from the Customer Service team (customer@i-l-m.com)

Security, confidentiality & copyright of End-point Assessment materials

EPA materials are protected by copyright and are supplied only to Approved Centres for use solely for the purpose of summative assessment.

The following conditions, which apply to EPA Materials, are additional to:

- The Standard Copying Conditions which can be found at <http://www.cityandguilds.com/142.html>; and
- (Where the City & Guilds ILM Assessment Materials are dated examinations), the JCQ Instructions for Conducting Examinations.

The employer and HEI must:

- Only use the EPA materials in formal, summative EPA leading to the award of an apprenticeship and not for any other purpose (including, but not restricted to, teaching, revision, as practice assessments or for commercial purposes)
- Handle and store securely the EPA materials in accordance with the following conditions
 - EPA materials must be accessible to apprentices only during formal EPA as governed by the assessment conditions specified for the individual apprenticeship;
 - The portfolio of the apprentice may contain assessment results referenced to the assessment taken but should not contain the EPA Materials (such as assessment tasks or questions or marked scripts if the tests may be reused (unless otherwise stated));

- The content of any EPA materials must not be made public in any format, either in part or in full;
- EPA materials must be securely handled and under no circumstances shared with third party organisations or individuals
- Seek written permission from the EPAO if they want to convert EPA Material for storage, retrieval and delivery in electronic form (i.e. using some form of e-assessment or e-learning system)
- Provide access, on request, to the EPAO to the system(s) on which the EPA Materials appear.

Section 2: Apprenticeship Occupation Standard

The Chartered Manager Degree Apprenticeship (CMDA) is a higher level degree apprenticeship set at Level 6. As part of the CMDA, the apprentice will study for a relevant degree, as well as undertake work based learning and professional development. It is based on the Standard which is described in this section.

The following information is taken from documentation published on the <https://www.instituteforapprenticeships.org/> website.

Standard for Operations/Departmental Manager

Knowledge

What is required (through formal learning and applied according to business environment)

Organisational Performance – delivering a long term purpose

Operational Strategy	Understand how to develop and implement organisational strategy and plans, including approaches to resource and supply chain management, workforce development, sustainability, taking and managing risk, monitoring and evaluation, and quality assurance. Know how to manage change in the organisation.
Project Management	Know how a project moves through planning, design, development, deployment and evaluation. Understand risk management models and reporting, risk benefit analysis and H&S implications.
Business Finance	Understand financial strategies, including budgets, financial management and accounting, and how to provide financial reports. Understand approaches to procurement and contracting, and legal requirements. Understand commercial context in an organisational setting and how this changes over time.
Sales and Marketing	Know how to create marketing and sales strategies. Know how to segment and target relevant markets and customers (global and local), analysis of opportunities and ways to market. Understand the need for innovation in product and service design.
Digital Business and New Technologies	Understand approaches to innovation and digital technologies and their impact on organisations, and how their application can be used for organisational improvement and development. Understand innovation and digital technology's impact on data and knowledge management for analysing business decision-making.

Interpersonal excellence – leading people and developing collaborative relationships

Communication	Understand different forms of communication (written, verbal, non-verbal, digital) and how to apply them. Know how to maintain personal presence and present to large groups. Awareness of interpersonal skills of effective listening, influencing techniques, negotiating and persuasion.
Leading People	Understand different inclusive leadership styles and models, how to develop teams and support people using coaching and mentoring approaches. Understand organisational culture and diversity management.
Managing People	Know how to recruit, manage and develop people, using inclusive talent management approaches. How to use HR systems and processes to ensure legal requirements, H&S, and well-being needs are met. Know how to set goals and manage performance.
Developing Collaborative Relationships	Understand approaches to stakeholder, customer and supplier management, developing engagement, facilitating cross functional working and negotiation. Know how to shape common purpose, as well as approaches to conflict management and dispute resolution.

Personal Effectiveness – managing self

Awareness of Self and Others	Know how to be self-aware and recognise different learning styles. Know how to use emotional and social intelligence, and active listening and open questioning to work effectively with others.
Management of Self	Know how to manage time, set goals, prioritise activities and undertake forward planning in a business environment with a focus on outcomes.
Decision Making	Know how to undertake research, data analysis, problem solving and decision-making techniques, and understand the values, ethics and governance of your organisation.

Skills

What is required (acquired and demonstrated through continuous professional development in the workplace)

Organisational Performance – delivering a long term purpose

Operational Strategy	Support the development of organisational strategies and plans. Develop and deliver operational plans; being able to set targets and KPIs, manage resources, and monitor and measure outcomes to establish operational effectiveness, efficiencies and excellence. Produce reports that clearly present information and data, using a range of interpretation and analytical processes. Gain wide support to deliver successful outcomes.
Project Management	Plan, organise and manage resources in order to achieve organisational goals. Identify key outcomes, develop and implement plans and monitor progress, and provide reports as required. Proactively identify risk and create plans for their mitigation. Able to initiate, lead and drive change within the organisation, identifying barriers/challenges and how to overcome them. Ability to use widely recognised project management tools.
Business Finance	Managing budgets, controlling expenditure and production of financial reports.
Sales and Marketing	Use of customer insight and analysis of data to determine and drive customer service outcomes and improve customer relationships. Creative approaches to developing solutions to meet customer need.
Digital Business and New technologies	Able to identify service/organisational improvements and opportunities for innovation and growth, using qualitative and quantitative analysis of information and data and benchmarking against others.
Interpersonal excellence – leading people and developing collaborative relationships	
Communication	Communicate clearly, effectively and regularly using oral, written and digital channels and platforms. Use active listening and open questioning to structure conversations and discussions, and able to challenge when appropriate. Manage and chair meetings and clearly present actions and outcomes. Ability to apply influencing and persuading skills, to the dynamics and politics of personal interactions.
Leading People	Able to articulate organisational purpose and values. Support the creation of an inclusive, high performance work culture. Enable others to achieve by developing and supporting them through coaching and mentoring.

Managing People	Able to build teams, empower and motivate others to improve performance or achieve outcomes. Able to delegate to others, provide clear guidance and monitor progress. Ability to set goals and accountabilities.
Developing Collaborative Relationships	Able to build rapport and trust, develop networks and maintain relationships with people from a range of cultures, backgrounds and levels. Able to contribute within a team environment. Effectively influence and negotiate, being able to have challenging conversations and give constructive feedback. Work collaboratively with internal and external customers and suppliers.
Personal Effectiveness – managing self	
Awareness of Self and Others	Able to reflect on own performance, identifying and acting on learning and development needs. Ability to understand impact on others. Can manage stress and personal well-being, and confident in knowing core values and drivers.
Management of Self	Able to create personal development plan, and use widely recognised tools and techniques to ensure the management of time and pressure effectively, and prioritisation and strategic alignment of activities.
Decision Making	Use evidence-based tools and ethical approaches to undertake problem solving and critical analysis, synthesis and evaluation to support decision making.
Behaviours	What is required (developed and exhibited in the workplace)
Takes responsibility	Drive to achieve in all aspects of work. Demonstrates resilience and determination when managing difficult situations. Seeks new opportunities underpinned by commercial acumen and sound judgement.
Inclusive	Open, approachable, authentic, and able to build trust with others. Seeks the views of others and values diversity internally and externally.
Agile	Flexible to the needs of the organisation. Is creative, innovative and enterprising when seeking solutions to business needs. Positive and adaptable, responding well to feedback and need for

	change. Open to new ways of working and new management theories.
Professionalism	Sets an example, and is ethical, fair, consistent and impartial. Operates within organisational values and adheres to the requirements of relevant professional bodies.

Section 3: End-point Assessment Guidance for Centres/ EPA Customers/Employers/HEIs

This section provides an overview of how the apprentice will be assessed after they have completed a relevant degree programme that fully maps to the Standard.

Introducing the EPA to the apprentice

Prior to the Gateway process the HEI should have made the apprentice aware of the different assessment methods that make up the EPA.

For this apprenticeship the following assessment methods will be introduced to the apprentice by the HEI:

- Portfolio
- Work Based Project
- Interview – including a Presentation, and Question & Answer session

The specific details around what the employer and HEI will share with the apprentice and the timelines can be found later in this document. When introducing any assessments it is expected that the HEI set a realistic timeframe for completion of each assessment, and that this should align with any timeline agreed with the EPAO when booking EPAs.

Health and 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.

The requirement to follow safe working practices is an integral part of all EPA, and it is the responsibility of the HEI and employer to ensure that all relevant health and safety requirements are in place when working on any projects or before apprentices begin any practical assessment.

Recording forms

The EPAO has designed specific Recording forms for customers to use. Customers must use the forms in the format provided in the *End-point Assessment Recording Forms for EPA Customers (Recording Forms for Customers)* document.

Submission of portfolio & work-based project

At Gateway, the apprentice's portfolio and work-based project must be made available for review by the IEPA ahead of the interview. Please note the following requirements:

1. All evidence for the portfolio and work-based project components must be available electronically, using formats such as Word, EXCEL, PDF etc.
2. Where the apprentice has created their portfolio and work-based project using an e-portfolio platform, the HEI may choose to upload them directly onto the EPA Pro portal or by providing access to their own e-portfolio system via the EPA Pro portal.
3. The portfolio and work-based project, whether uploaded or provided via access to an e-portfolio, must be structured to clearly reference the required Knowledge, Skills and Behaviours, as set out in the City & Guilds Evidence Matrix. HEIs should note that an incomplete and/or unfocussed portfolio will likely be returned and not assessed.
4. The completed City & Guilds Evidence Matrix must be uploaded to the EPA Pro portal regardless of whether the portfolio and work-based project are uploaded or access to an e-portfolio is provided. See section 6 of this pack for further information on the portfolio and City & Guilds Evidence Matrix.

Authenticating the apprentice's work

The apprentice must:

- Sign a *Declaration of Authenticity form* confirming that the work is their own
- Reference all sources

The *Declaration of Authenticity form* must be completed and included when submitting evidence to the EPAO. This form can be found in the *EPA Recording Forms for Customers* document, and must be signed by the Line Manager, HEI and apprentice. A new signed declaration is required for re-sits/re-takes where additional evidence is being submitted.

During the Degree Apprenticeship the HEI and employer can also aid authentication by:

- Supplementary (oral) questioning to gauge familiarity with the topic
- Looking out for any changes to the apprentices usual writing style, unusual sources/examples or the use of e.g. US spellings or phrases that might indicate cutting and pasting from the internet
- Ensuring that work is fully referenced
- Requiring access to evidence of steps in the process e.g. drafts, notes, planning etc.

Determining the overall End-point Assessment grade

The IEPA will review the portfolio and work-based project, and following the interview, judge whether the apprentice has met the requirements of the Standard.

The marking decision will be made by the IEPA, subject to internal moderation by the LIEPA. Results will not be confirmed until after moderation.

This will not have any impact on the final degree classification that the HEI awards to the apprentice.

The tables below show the weighting for each component, and how the final mark is used to determine the overall grade for the apprenticeship.

The total weighted mark gives the final apprenticeship grade. A grade is not awarded for each individual EPA.

EPA component	Weighting
Portfolio (702/752)	55%
Work-based project (700/750)	25%
Interview: Presentation & Q&A (701/751)	20%
Total	100%

The total weighted mark gives the final apprenticeship grade. A grade is not awarded for each individual component.

Grade	Total Mark
Distinction	70+
Merit	60+
Pass	50+
Fail	Lower than 50

Sharing of results with apprentices

IEPAs will not share any individual results or feedback with the apprentice or customers during, immediately following or between the different assessments.

Results submission and Certification

The IEPA will share the results with the LIEPA for quality assurance. If the apprentice passes the EPA, the EPAO will issue the EPA *Record of Achievement* confirming the grade achieved to the HEI and will notify the Institute for Apprenticeships and Technical Education who will issue the Apprenticeship certificate.

Feedback

The IEPA will not provide any feedback to the apprentice during or immediately following the end-point assessment process. Feedback will be provided for all apprentices, following submission of evidence to the EPAO and after any grade determination has been carried out.

Opportunities to re-sit/re-take

Apprentices who fail any EPA can take a re-sit/re-take. A re-sit is where the apprentice takes the assessment again without the need for new learning. A re-take is where the employer determines new learning is needed first.

Apprentices are only required to re-sit any components of the EPA that they have failed. In all cases the employer and HEI will need to agree that a re-sit or re-take is an appropriate course of action, and develop a supportive action plan to prepare the apprentice based on the feedback provided by the IEPA.

Re-sits are not offered to apprentices wishing to improve the overall grade, unless the EPAO deems there to be exceptional circumstances warranting consideration. This is at the EPAO's discretion.

All EPAs must be successfully completed within 6 months of Gateway.

An EPA re-sit booking will be needed for the relevant EPA component. Although there are no restrictions in terms of re-sitting EPA for this occupation, multiple assessment opportunities are not expected. All parties should be confident that the apprentice is ready to re-sit the EPA.

Appeal Process

Any appeal in relation to the outcome of the EPA will initially be managed by the EPAO.

Section 4: End-point Assessment Resources List

Assessment method	Resources required
Interview EPA - Presentation on work-based project followed by Question & Answer session	<ul style="list-style-type: none">• A suitable room for the apprentice to use for the presentation and interview• A laptop that is operationally ready for the apprentice to use• A suitable internet connection for the apprentice to join the web-conferencing call• Access to water and cups

Section 5: End-point Assessment Timeline

The process of setting up the EPA will typically begin six months before the completion of the apprenticeship. The timeline shows the EPA process. It is the responsibility of the employer and HEI to ensure that the apprentice is ready for each stage of this timescale.

Time line	Activity
On-going prior to completion	<p>Employer and HEI:</p> <ul style="list-style-type: none"> • Reviews progress and ensures apprentice’s performance is on track as part of the regular performance management process • Identifies any gaps and creates an action plan to address these gaps • Creates a plan for the EPA with the apprentice • Considers whether the apprentice’s potential evidence for portfolio is appropriate and sufficient to assess the entirety of the Standard • Makes an EPA registration on Walled Garden <p>Apprentice:</p> <ul style="list-style-type: none"> • Completes the English and Maths components of the apprenticeship • Completes their portfolio of evidence and undertakes work based project • Completes management degree
Gateway process	<p>The apprentice and line manager/tutor review progress and confirm that the apprentice is ready for end-point assessment.</p> <ul style="list-style-type: none"> • All supporting evidence is uploaded into the EPA Pro portal through the Gateway process. Where an e-portfolio platform has been used, access must be provided to the IEPA via the EPA Pro portal. • The apprentice signs the completed Apprentice Gateway Declaration Form and this is uploaded by the provider in the EPA Pro portal Gateway process. • The provider completes a declaration and e-signature on behalf of the provider and employer in the EPA Pro portal.
Book EPA in line with the EPA booking timelines	<p>HEI:</p> <ul style="list-style-type: none"> • Makes EPA booking on Walled Garden • Provides Gateway evidence • Makes additional arrangements for the interview EPA, e.g. book equipment

Time line

Activity

EPA Team:

- Contact HEI to agree potential date(s) for the interview EPA
- Contact the prospective IEPA, and provide them with the provisional details along with the range of potential date(s) for the interview EPA
- Communicate with the HEI and IEPA to agree and confirm a mutually convenient date
- Formally confirms the booking by email to HEI

End-point
Assessment

HEI:

- Submits apprentice's portfolio electronically at least two weeks ahead of the Interview EPA date
- Submits apprentice's work-based project electronically at least two weeks ahead of the interview EPA date

Apprentice:

- (Interview EPA) Presentation to the IEPA
- Undertakes a competency based interview with the IEPA following the presentation

IEPA:

- Marks each assessment component after it has been undertaken
- Makes the final decision about the marks for each individual EPA

End of
apprenticeship

IEPA:

- The IEPA communicates marks allocated for each assessment to the LIEPA
- Uploads recording forms and calculator to the EPA Pro Portal
- The LIEPA samples and quality assures assessments and confirms overall grade

EPA Team:

- The EPA Team communicates the results to the HEI via Walled Garden within 24 hours
- The EPA Team processes the overall result. If the apprentice has passed the EPA the EPA Team advises the Institute for Apprenticeships and Technical Education (IFATE) which

Time line

Activity

issues the certificate directly to the employer. The data will be provided to IFATE by the EPA Team

- If the apprentice has passed the EPA a *Statement of Achievement* will also be issued and sent to the HEI within 20 working days
 - If the apprentice has failed any of the components the EPA Team will notify the HEI
-

Section 6: Guidance for each End-point Assessment

The entirety of the Standard must be achieved holistically. The information below explains how each assessment component is structured and guidance on how to prepare evidence for submission.

Assessment 702/752 Portfolio

Assessment Specification

The apprenticeship provides an integrated approach to developing and assessing knowledge, skills and behaviours across a range of modules within the degree programme. Each HEI will develop its own degree programme and will map the individual modules to the outcomes in the Standard. Individual modules will contribute to the on-programme assessment of knowledge, skills and behaviour outcomes en-route to the final synoptic EPA.

A portfolio of evidence will be created during the on-programme activity and then assessed during EPA. The employer and HEI will help the apprentice develop their portfolio to ensure that it is complete and that it covers the Standard.

Instructions for Customers

The apprentice's portfolio will include a variety of pieces of evidence that cover the totality of the Standard. This will be a range of materials and documents generated over the period of the apprenticeship which demonstrate application of leadership and management concepts, as well as their achievements and capabilities.

The employer and HEI will advise the apprentice in the completion of their portfolio and the selection of the best evidence. For apprentices operating at this level it is reasonable to expect them to take a high level of ownership of their portfolio so the employer and HEI must make them aware of their responsibility. The HEI must ensure that the apprentice understands the approach to marking to help them prepare their portfolio.

The portfolio is the apprentice's opportunity to efficiently demonstrate their performance in relation to the learning outcomes. The evidence contained within the portfolio may also be referred to as part of the interview EPA.

The portfolio will be produced by the apprentice having first learned, and then applied the relevant skills/competencies and behaviours. It will show their very best work, enabling them to showcase how they have applied their knowledge and understanding in a real work environment to achieve real work objectives. It will show how they have demonstrated the behaviours against the Standards, especially around communication and team work, as well as areas where they have exceeded the requirements of the role.

The HEI will submit the apprentice's electronic portfolio, either directly to the EPA Pro portal or by providing access to their own e-portfolio system via the EPA Pro portal, at least two weeks before the interview EPA, along with the mandatory *Declaration of Authenticity* and *City & Guilds Evidence Matrix*.

The completed *City & Guilds Evidence Matrix* directs the IEPA to where in the portfolio they can find the apprentice's evidence for the entirety of the standard, enabling the IEPA to assess the evidence effectively.

Apprentices may choose how they reference their evidence; typically, the reference should include the document and the page, or time if it's recorded evidence. There is not a prescribed number of pieces of evidence, however it is not expected that there will be unique evidence presented for each learning outcome. An apprentice working at this level should be able to provide pieces of evidence which cover a range of learning outcomes holistically.

Types of evidence

The evidence should be produced in electronic format or scanned/ photographed to give a clear electronic representation, as it must be submitted electronically for EPA.

It can be for example:

- Work products e.g. Electronic documents such as minutes from meetings, feedback on performance, appraisals etc
- Reflective journal – an account from the apprentice providing evidence of their thinking e.g. their considerations of processes used; reasons for decisions made; evaluations and suggested improvements to future practice.
- Witness testimony – evidence from a reliable, authentic witness giving their account of what the apprentice has done in their job role. The witness can range from a manager to a customer. Statements should be dated and signed by the witness
- 360 degree feedback from managers and peers
- Project plans and documentation
- Reports
- Minutes of meetings
- Demonstrations
- Presentations
- Academic assignments
- Research projects
- Video or audio evidence – it is helpful if the IEAP can easily identify the key pertinent points within the recording where an outcome is being met, and which individual is the apprentice. This could be further supported with an annotated or written summary

All evidence must be of the apprentice's own work and, for any team work, must clarify and focus only on their own contribution.

The IEPA will not be familiar with the apprentice or the specifics of their work environment, so evidence must be clear and unambiguous – supporting context statements are recommended to support evidence that could be open to misinterpretation.

Where necessary, confidentiality and data protection requirements must be adhered to e.g. permissions for use of video/images containing identifiable individuals (e.g. colleagues, clients), anonymisation of documentation, and permission when submitting sensitive information.

Selecting evidence

To assemble their portfolio, the apprentice with the support of their employer and HEI, should consider all the evidence they have available that shows they have fully met the Standards.

Evidence collected towards the end of their apprenticeship, as they become independent in their work, is likely to provide the most holistic evidence – i.e. covering a number of learning

outcomes at once. From this, they should select evidence that most efficiently meets holistically all learning outcomes, and which demonstrates their best performance.

In selecting evidence for the portfolio, the apprentice should review the *City & Guilds Evidence Matrix* to identify the evidence that can be generated from their learning and practice whilst on the apprenticeship. The *City & Guilds Evidence Matrix* includes:

- the learning outcomes to be covered between the portfolio and project

Where the knowledge, skills and behaviours are not naturally occurring, the employer could expose the apprentice to projects, meetings or workplace shadowing to generate evidence. Case study/scenario assessments are allowed in exceptional circumstances and should be used sparingly. A discussion with the employer should always be the first step taken to explore ways of creating a project/activity around areas not ordinarily covered by the role in the work place as opposed to completing a case study/simulation.

Overlap may occur as there will be product evidence, supported by other evidence (e.g. Professional Discussion) providing context and details of the apprentice's role in creating it. These pieces of evidence should cover and be presented against multiple learning outcomes a following a holistic approach to assessment. It is not expected that multiple pieces of evidence will be presented against a single criterion or learning outcome.

There are two questions that an apprentice should consider when selecting work to form their portfolio:

1. Which pieces **holistically** (most efficiently) give evidence that together cover multiple learning outcomes?
2. Is this the **best** evidence I have, showing that I have met all of the requirements?

Confirming the evidence selection

When the apprentice has selected the evidence, this must be reviewed by the employer and HEI to ensure that:

- All learning outcomes have been met in relation to the Standards
- It has been generated during the apprenticeship
- There is no unnecessary duplication of evidence against the learning outcome
- The work selected represents the best evidence available
- The clarity of any images or scanned evidence is sufficient to determine the quality of the original evidence
- The role and contribution of the apprentice is clear when evidence is from project or team work
- Authenticity of evidence has been established

Submitting evidence

Evidence must be presented as follows:

- In electronic format, with a header on each page containing the name of the apprentice, and the date the evidence was produced and an evidence reference number
- Each piece of evidence must be referenced to the learning outcomes and assessment method it is being submitted against on the *City & Guilds Evidence Matrix*
- One *City & Guilds Evidence Matrix* should be submitted to cover both the portfolio and work-based project which covers the entirety of the standard
- Every learning outcome must be evidenced between the portfolio or work-based project
- The *City & Guilds Evidence Matrix* must be uploaded in Word format
- A completed and signed *Declaration of Authenticity* must be provided

Submitting an e-portfolio

Any suitable e-portfolio may be used, for example Pebble Pad, OneFile and Maytas. Where an e-portfolio is used the HEI must ensure the following additional requirements are met:

- Secure access to the e-portfolio is provided to allow the IEPA/LIEPA to review the content between Gateway and the conclusion of the EPA for each apprentice.
- Information about the e-portfolio system is uploaded to the EPA Pro portal, including:
 - details of how the IEPA/LIEPA will access the e-portfolio
 - guidance and support is provided to ensure the IEPA/LIEPA can effectively access all required content in the chosen e-portfolio platform, including how prompt support will be provided during the assessment, if required.
- Evidence to be submitted via an e-portfolio is carefully checked and confirmed as relevant to the Knowledge, Skills and Behaviours, as set out in and referenced to the City & Guilds Evidence Matrix. The completed City & Guilds Evidence Matrix must be uploaded to the EPA Pro portal whenever an e-portfolio is used.
- Each e-portfolio must be locked to prevent any changes to content once the access details have been submitted to the EPA Pro portal.
- On request, access to e-portfolio content must be provided for a period of three years following the assessment date should any review, appeal, malpractice investigation or other monitoring activity be necessary.

Portfolio checklist

A portfolio checklist has been created to help the HEI and apprentice ensure that all relevant information is accounted for:

Portfolio checklist		Tick when confirmed
1.	Is all evidence named, dated, and given a reference number on the City & Guilds Evidence Matrix?	
2.	Is all evidence valid, authentic, current and sufficient (VACS)?	

Portfolio checklist		Tick when confirmed
3.	Does evidence clearly show it is the apprentice's individual work (and if involved in team work is it clear the specific contribution the apprentice made)?	
4.	Does the evidence clearly demonstrate their relevant knowledge?	
5.	Does it showcase the apprentice's best pieces of work?	
6.	Is the majority of the evidence holistic in its nature, and not unnecessarily duplicated?	
7.	Is there sufficient evidence to cover the whole of the Standard?	
8.	Are any witness testimonies or employer references tailored to the apprentice and demonstrate the relevant skills and behaviours?	
9.	Has any sensitive information been anonymised?	
10.	Have all external sources of information being appropriately documented and referenced to the original source, showing clear understanding of how they relate to the criteria?	
11.	The HEI and employer have ensured that the apprentice's portfolio includes sufficient evidence for all the criteria that meets the entirety of the standard.	

Portfolio Sampling

The IEPA will use a sampling plan to assess 20% learning outcomes as per the assessment plan. Once the 20% has been achieved the IEPA will then consider the merit and distinction level descriptors listed below:

Merit level descriptors
Have they critically reviewed, consolidated and extended a systematic and coherent body of knowledge, utilising specialised skills?
Have they transferred and applied diagnostic and creative skills and exercised significant judgement in a range of situations?

Distinction level descriptors

Have they critically evaluated new concepts and evidence from a range of sources?

Have they accepted accountability for determining and achieving group and/or personal outcomes?

The portfolio carries a total of 55 marks which are weighted and will contribute to the overall EPA grade.

Re-sits/re-takes

If the apprentice fails the EPA, a reservation request (re-sit) must be booked.

A new *City & Guilds Evidence Matrix* is completed by the apprentice with any additional evidence for the learning outcomes previously failed. The IEPA will only review the new evidence and existing evidence will not be re-assessed.

Instructions for Apprentices

You will have compiled a portfolio during your apprenticeship which will include a variety of pieces of evidence that cover the totality of the Standard. This will be a range of materials and documents which demonstrate application of leadership and management concepts, as well as your achievements and capabilities.

The portfolio is your opportunity to efficiently demonstrate your performance in relation to the learning outcomes. The evidence contained within your portfolio may also be referred to as part of the interview EPA.

Your portfolio will need to be submitted at least two weeks before the interview EPA, along with the mandatory *Declaration of Authenticity* and *City & Guilds Evidence Matrix*.

The completed *City & Guilds Evidence Matrix* directs the IEPA to where in the portfolio they can find your evidence for the entirety of the standard.

You may choose how you reference the evidence; typically, the reference should include the document and the page, or time if it's recorded evidence. There is not a prescribed number of pieces of evidence, however it is not expected that there will be unique evidence presented for each learning outcome. Working at this level you should be able to provide pieces of evidence which cover a range of learning outcomes holistically.

Types of evidence

All evidence must be your own work and, for any team work, you must clarify and focus only on your own contribution.

The IEPA will not be familiar with you or the specifics of your work environment, so evidence must be clear and unambiguous – supporting context statements are recommended to support evidence that could be open to misinterpretation.

Where necessary, confidentiality and data protection requirements must be adhered to e.g. permissions for use of video/images containing identifiable individuals (e.g. colleagues, clients), anonymisation of documentation, and permission when submitting sensitive information.

Selecting evidence

To assemble your portfolio, you with the support of your employer and HEI, should consider all the evidence available that shows you have fully met the Standards.

Evidence collected towards the end of your apprenticeship, as you become independent in your work, is likely to provide the most holistic evidence – i.e. covering a number of learning outcomes at once. From this, you should select evidence that most efficiently meets holistically all learning outcomes, and which demonstrates your best performance.

Confirming the evidence selection

Once you have selected the evidence, this must be reviewed by your employer and HEI to ensure that:

- All learning outcomes have been met in relation to the Standards
- It has been generated during your apprenticeship
- There is no unnecessary duplication of evidence against the learning outcome
- The work selected represents your best evidence available
- The clarity of any images or scanned evidence is sufficient to determine the quality of the original evidence
- Your role and contribution is clear when evidence is from project or team work
- Authenticity of evidence has been established

Submitting evidence

Your evidence must be presented as follows:

- In electronic format, with a header on each page containing your name, and the date your evidence was produced and an evidence reference number
- Each piece of evidence must be referenced to the learning outcomes and assessment method it is being submitted against on the *City & Guilds Evidence Matrix*
- One *City & Guilds Evidence Matrix* should be submitted to cover both the portfolio and work-based project which covers the entirety of the standard
- Every learning outcome must be evidenced between the portfolio or work-based project
- The *City & Guilds Evidence Matrix* must be uploaded in Word format
- A completed and signed *Declaration of Authenticity* must be provided

Portfolio Sampling

The IEPA will use a sampling plan to assess 20% learning outcomes as per the assessment plan. Once the 20% has been achieved the IEPA will then consider the merit and distinction level descriptors listed below:

Merit level descriptors
Have they critically reviewed, consolidated and extended a systematic and coherent body of knowledge, utilising specialised skills?
Have they transferred and applied diagnostic and creative skills and exercised significant judgement in a range of situations?
Distinction level descriptors
Have they critically evaluated new concepts and evidence from a range of sources?
Have they accepted accountability for determining and achieving group and/or personal outcomes?

The portfolio carries a total of 55 marks which are weighted and will contribute to your overall EPA grade.

Re-sits/re-takes

If you fail the EPA a new *City & Guilds Evidence Matrix* should be completed with any additional evidence for the learning outcomes previously failed. The IEPA will only review the new evidence and existing evidence will not be re-assessed.

Assessment 700/750 Work Based Project

Assessment Specification

The work-based project is a substantive piece of evidence from a business related project demonstrating the application of skills and knowledge accumulated throughout the apprenticeship, bringing together elements of all learning. The project will take place towards the end of the apprenticeship and will also be part of the management degree activity.

Each project must enable the following to be demonstrated:

- The application of knowledge and skills to meet the outcomes of the Standard
- The approach to planning and completion of the project
- The application of behaviours from the Standard

It is designed to assess apprentices in a consistent way, irrespective of their workplace and HEI. The project should be conducted as part of the apprentice's normal work.

The completed project work will be submitted to the HEI for assessment as part of the degree, and also for the IEPA to assess as part of the EPA.

Instructions for Customers

Selecting and delivering the project

Because of the significance of the project, the employer and HEI will work together with the apprentice to agree a project that is achievable within the employer's business constraints whilst meeting the needs of the Standard. The EPAO does not need to agree or approve the project topic.

The employer should make allowance, in terms of time and resource, for the project to be undertaken. Any elements which need to be undertaken outside of normal work should be agreed between the employer, apprentice and HEI so that apprentices are not disadvantaged in any way from performing their job and meeting the requirements of the project.

HEIs must use the following guidance from the Assessment Plan to support the apprentice in designing, delivering and documenting their work-based project:

Design of the project

- Specification of what has to be delivered on completion of the project – this must include the outputs, project plans etc.
- Terms of reference developed by the apprentice and agreed by the HEI and employer early in the project
- HEI to provide clear project assessment criteria including terms of reference, approach to the problem, solution design and implementation, the final report and presentation.
- Apprentices must document their assumptions and highlight the consequences of these assumptions – enabling them to demonstrate their understanding of commercial pressures and the application of their thinking and problem solving skills

- Agreement to be made between the apprentice, employer and HEI on what systems, tools and platforms will be required (if any) to complete the tasks and how these will be made available

Delivery of the project

- HEIs will work with the employer and apprentice to agree the project title and support arrangements required to enable the project to be undertaken
- The project should normally be based on an agreed business problem that forms part of the apprentice's role
- Suitable time should be set aside by the employer for the apprentice to plan, undertake and write up their project
- The apprentice will first work out what is required and present terms of reference and an initial plan for agreement with the employer and HEI
- The project will typically be undertaken at the employer's premises
- The employer and HEI will ensure that the apprentice has access to the tools and systems required to complete the tasks within the project
- The apprentice will provide a signed *Declaration of Authenticity* to confirm the project is their own work
- The synoptic project will be set and completed during the final year of the apprenticeship, near the end of the programme

Requirements for the project environment

- A suitable project environment should be provided ensuring access to all required tools and systems. This may be the apprentice's normal place of work/work station, or another environment suitable for the project
- Someone responsible for managing the project from the employer perspective should be assigned e.g. work based supervisor or coach

Guidance on evidence

The HEI must submit the apprentice's work-based project to the EPA Pro Portal at least two weeks ahead of the date of the interview EPA, along with the mandatory *Declaration of Authenticity* (if not already supplied) and *City & Guilds Evidence Matrix*.

The apprentice's project will include a collection of pieces of evidence. The *City & Guilds Evidence Matrix* directs the IEPA to where they can find the apprentice's evidence for the learning outcomes, enabling the IEPA to assess the evidence efficiently and effectively.

Apprentices may choose how they reference their evidence; typically the reference should include the document and the page, or time if it's recorded evidence. There is not a prescribed number of pieces of evidence, however it is not expected that there will be one piece of evidence for each learning outcome. An apprentice working at this level should be able to provide pieces of evidence which cover a range of learning outcomes.

The work-based project should typically include:

- evidence of the design, planning and delivery of the project
- an explanation of the business need which has been identified
- the terms of reference agreed with the HEI and employer

The evidence may take the form of:

- meeting notes and correspondence
- project plans
- communication, stakeholder and document registers

Each project must enable the following to be demonstrated:

- The application of knowledge and skills to meet the outcomes in the standard
- The approach to planning and completion of the project
- The application of behaviours from the standard

Confirming the evidence selection

When the apprentice has selected the evidence, this must be reviewed by the employer and HEI to ensure that:

- All the skills, knowledge and behaviours in the standard have been met holistically
- It has been generated during the apprenticeship
- There is no unnecessary duplication of evidence against the same learning outcome
- The work selected represents the best evidence available
- The clarity of any images or scanned evidence is sufficient to determine the purpose and quality of the original evidence
- Authenticity of evidence has been established

Submitting evidence

Evidence must be presented as follows:

- In electronic format, with a header on each page containing the name of the apprentice, the date the evidence was produced and an evidence reference number
- Each piece of evidence must be referenced to the learning outcome and assessment method it is being submitted against on the *City & Guilds Evidence Matrix*
- One *City & Guilds Evidence Matrix* should be submitted to cover both the portfolio and work-based project
- **All learning outcomes must be evidenced to meet the entirety of the standard between the portfolio and work-based project**
- **The apprentice will decide which learning outcome they provide evidence for**
- The *City & Guilds Evidence Matrix* must be uploaded in Word format
- A completed and signed *Declaration of Authenticity* must be provided (if not already supplied)

Marking

Once the requirements listed above have been achieved the IEPA will then consider the merit and distinction level descriptors listed below:

Merit level descriptors
Have they critically reviewed, consolidated and extended a systematic and coherent body of knowledge, utilising specialised skills?
Have they transferred and applied diagnostic and creative skills and exercised significant judgement in a range of situations?

Distinction level descriptors

Have they critically evaluated new concepts and evidence from a range of sources?

Have they accepted accountability for determining and achieving group and/or personal outcomes?

The work-based project will not be awarded a grade. The work-based project marks will contribute to the overall EPA grade.

The work-based project carries a total of 25 marks which are weighted and will contribute to the overall EPA grade.

Re-sits/re-takes

If the project does not demonstrate the practical requirements of the synoptic project including design and delivery, application of the standard (knowledge, skills, behaviours) approach to planning and completion of the project, this will result into a fail.

If the apprentice fails the EPA, a reservation request (re-sit) must be booked.

A new City & Guilds Evidence Matrix is completed by the apprentice with any additional evidence for the learning outcomes previously failed. The IEPA will only review the new evidence and existing evidence will not be re-assessed.

Instructions for Apprentices

You will have completed a work-based project towards the end of your apprenticeship that demonstrates the knowledge, skills and behaviours that you have acquired.

Selecting, designing and delivering your project

Because of the significance of the project, your employer and HEI will work together with you to agree a project that is achievable within your employer's business constraints whilst meeting the needs of the Standard.

Your employer should make allowance, in terms of time and resource, for your project to be undertaken. Any elements which need to be undertaken outside of normal work should be agreed between your employer, you and your HEI so that you are not disadvantaged in any way from performing your job and meeting the requirements of your project.

Your employer and HEI can advise you about designing, delivering and documenting your project, and the selection of best evidence to demonstrate that you have met the Standards. You should take a high level of ownership of your work-based project.

You'll start by working out what is required and present it in a terms of reference and an initial plan for agreement with your employer and HEI.

Guidance on evidence

Your work-based project will include a collection of pieces of evidence. The *City & Guilds Evidence Matrix* directs the IEPA to where they can find the apprentice's evidence for the learning outcome.

You may choose how to reference your evidence; typically your reference should include the document and the page, or time if it's recorded evidence. There is not a prescribed number of pieces of evidence, however it is not expected that there will be one piece of evidence for each learning outcome. Working at this level you should be able to provide pieces of evidence which cover a range of learning outcomes.

Your work-based project should typically include:

- evidence of the design, planning and delivery of your project
- an explanation of the business need which you have identified
- the terms of reference agreed with your HEI and employer

Your evidence may take the form of:

- meeting notes and correspondence
- project plans
- communication, stakeholder and document registers

Your project must enable the following to be demonstrated:

- The application of knowledge and skills to meet the outcomes in the standard
- The approach to planning and completion of the project
- The application of behaviours from the standard

Confirming the evidence selection

Once you have selected your evidence, this must be reviewed by your employer and HEI to ensure that:

- All the skills, knowledge and behaviours in the standard have been met holistically
- It has been generated during your apprenticeship
- There is no unnecessary duplication of evidence against the same learning outcome
- The work selected represents your best evidence available
- The clarity of any images or scanned evidence is sufficient to determine the purpose and quality of the original evidence
- Authenticity of evidence has been established

Submitting evidence

Your evidence must be presented as follows:

- In electronic format, with a header on each page containing your name, the date your evidence was produced and an evidence reference number
- Each piece of evidence must be referenced to the learning outcome and assessment method it is being submitted against on the *City & Guilds Evidence Matrix*
- One *City & Guilds Evidence Matrix* should be submitted to cover both the portfolio and work-based project
- **All learning outcomes must be evidenced to meet the entirety of the standard between the portfolio and work-based project**
- **You will decide which learning outcome you provide evidence for**
- The *City & Guilds Evidence Matrix* must be uploaded in Word format
- A completed and signed *Declaration of Authenticity* must be provided (if not already supplied)

Your work-based project must be submitted at least two weeks ahead of the date of the interview EPA, along with the mandatory *Declaration of Authenticity* (if not already supplied) and *Evidence*.

Marking

Once the requirements listed above have been achieved the IEPA will then consider the merit and distinction level descriptors listed below:

Merit level descriptors
Have they critically reviewed, consolidated and extended a systematic and coherent body of knowledge, utilising specialised skills?
Have they transferred and applied diagnostic and creative skills and exercised significant judgement in a range of situations?
Distinction level descriptors
Have they critically evaluated new concepts and evidence from a range of sources?
Have they accepted accountability for determining and achieving group and/or personal outcomes?

Your work-based project will not be awarded a grade. Your work-based project marks will contribute to your overall EPA grade.

The work-based project carries a total of 25 marks which are weighted and will contribute to the overall EPA grade.

Re-sits/re-takes

If your work-based project does not demonstrate the practical requirements of the synoptic project including design and delivery, application of the standard (knowledge, skills, behaviours) approach to planning and completion of the project, this will result into a fail.

If you fail the EPA a new *City & Guilds Evidence Matrix* should be completed with any additional evidence for the learning outcomes previously failed. The IEPA will only review the new evidence and existing evidence will not be re-assessed.

Assessment 701/751 Interview (Presentation and Question & Answer)

Assessment Specification

Interview

The interview is the final EPA assessment. The apprentice will be required to take part in two activities – a presentation on the work-based project, and a question and answer session (Q&A).

Presentation

The apprentice will deliver a 15 minute presentation which describes the objectives and outcomes of their work-based project and will demonstrate:

- What the apprentice set out to achieve
- What they have produced during the project
- How they approached the work and dealt with any issues
- Appropriate interpersonal and behavioural skills

Question and answer session

After the presentation, a Q&A session of 40-50 minutes will take place between the IEPA and apprentice.

The apprentice will provide responses to a series of competency based questions put to them by the IEPA. The questions will require the apprentice to draw on their experiences throughout their apprenticeship but will also focus on the findings/ recommendations made within their work-based project activity.

Instructions for Customers

Arranging the interview

The HEI will co-ordinate the EPA with the EPA Team to gather potential date(s).

The interview EPA will take place remotely using an online virtual meeting platform.

1¼ hours should be allowed per apprentice, to include the apprentice's presentation, followed by the Q&A session.

The employer and HEI must ensure they have provided a quiet room free from distractions and interruptions, along with any equipment required by the apprentice for their presentation. They must ensure that the assessment environment is maintained throughout the duration of the assessment activity. This could include appropriate signposting.

Preparing the apprentice

The employer and HEI will prepare the apprentice for the presentation and Q&A by:

- ensuring they are aware of the requirements of the EPA

- supporting the development of their presentation and interview skills
- reviewing the content of their presentation to ensure that it demonstrates the knowledge, skills and behaviours exhibited during the work-based project
- instructing them to bring photo ID. The assessment cannot proceed without the ID process being completed to the IEPA's satisfaction

The interview EPA

The IEPA will welcome the apprentice and explain what will happen in the EPA. The apprentice must show their photo identification.

The first stage of the interview EPA is the presentation by the apprentice about their work-based project. The apprentice will deliver a 15 minute presentation which describes the objectives and outputs of their work based project.

The IEPA will stop the presentation after 17 minutes, so the apprentice should ensure that their presentation doesn't overrun.

The EPAO has not specified the format of the presentation, and presentation skills will not be marked, however good presentation and interview skills will help the apprentice showcase their knowledge, skills and behaviours. Apprentices may use PowerPoint and presentation aides as they see fit. Technical requirements must be agreed with the HEI in advance so that the appropriate equipment is available.

The Q&A session will consist of open, competency based questions about the apprentices experience during their apprenticeship, with follow up questions allowed for clarification. The questions will not be shared with the apprentice prior to the EPA. As a guide, the questions will be based around their project, and the areas of the apprenticeship (organisational performance, interpersonal excellence, professional effectiveness).

The apprentice can have their own notes, their portfolio and work-based project available during the interview EPA.

Marking

Marks are awarded where the IEPA sees that the apprentice is sufficiently demonstrating the knowledge, skills and behaviours required in the Standard. The learning outcomes provided in the *City & Guilds Evidence Matrix* for the portfolio and project apply. These can be found in the *Recording Forms for Customers* document.

The Presentation is marked out of 10, and the Q&A is marked out of 30. The marks awarded by this assessment component are weighted to a total of 20 marks. The Assessment Plan dictates that the interview EPA mark is given a weighting of 20% towards the final EPA mark, which in turn dictates the final EPA grade. Pass, Merit or Distinction grades are not awarded to the individual interview EPA.

Re-sits/re-takes

If the apprentice fails the EPA, a reservation request (re-sit) must be booked. A new interview EPA meeting will be arranged. The entire component is marked again.

Instructions for Apprentices

As part of the interview EPA you will be required to:

- bring photo ID to the presentation
- make a presentation on your work-based project
- join a question and answer session about your experience during your apprenticeship

This EPA will usually take 1-1¼ hours. The assessment cannot proceed without the ID process being completed to IEPA's satisfaction.

Presentation

Your presentation will focus on the outcomes of your work-based project. You'll be making the presentation to the IEPA. Your presentation should be 15 minutes and describe the objectives and outcomes of your work-based project, and demonstrate:

- What you set out to achieve
- What you have produced during the project
- How you approached the work and dealt with any issues
- Demonstrations of appropriate interpersonal and behavioural skills

You should ensure that your presentation doesn't overrun, and it will be stopped if you run over 17 minutes.

You can decide how to make your presentation, and what presentation aides you want to use. Presentation skills will not be marked, however good presentation and interview skills will help you showcase your knowledge, skills and behaviours. Your employer and HEI can help you develop your presentation skills and decide what to include in your presentation. You'll typically want to include the key points from your work-based project EPA submission.

All evidence must be of your own work and, for any team work, must clarify and focus only on your contribution. You can have your own notes, portfolio and work-based project available during the presentation and Q&A session.

Make sure that your HEI has arranged for any equipment you need to be available at the venue, and that it's compatible and in working order. Your employer and HEI will ensure that there is a quiet room free from distractions and interruptions.

Q&A session

After the presentation, a 40-50 minute Q&A session will take place with the IEPA about your experience during your apprenticeship. You will be asked a series of competency based questions. You will need to draw on your experiences throughout your apprenticeship and the outcomes of your work-based project activity.

Marking

Marks are awarded where the IEPA sees that you are sufficiently demonstrating the knowledge, skills and behaviours required in the Standard.

Your presentation is marked out of 10, and the Q&A is marked out of 30. The marks awarded by this assessment component are weighted to a total of 20 marks. The Assessment Plan

dictates that the interview EPA mark is given a weighting of 20% towards your final EPA mark, which in turn dictates your final EPA grade.

The final EPA grade is awarded based on the total mark across all of the individual assessment components.

Re-sits/Re-takes

In the event where you fail the interview (presentation with Q&A), the entire presentation will need to take place followed by the interview with Q&A.

Section 7: Level 6 CMDA Assessment Criteria

The learning outcomes and assessment criteria for the Chartered Manager Degree Apprenticeship have been based upon the following level 6 descriptors:

- critically review, consolidate and extend a systematic and coherent body of knowledge, utilising specialized skills across an area of study;
- critically evaluate new concepts and evidence from a range of sources;
- transfer and apply diagnostic and creative skills and exercise significant judgment in a range of situations;
- accept accountability for determining and achieving group and/or personal outcomes.

The following table specifies the learning outcomes, assessment criteria and assessment methods for this Standard.

Topic	Learning Outcome	Assessment Criteria	Assessment Method
Organisational performance - delivering a long-term purpose			
1. Operational Strategy	K1.1 How to develop and implement organisational strategy and plans, including approaches to resource and supply chain management, workforce development, sustainability, taking and managing risk, monitoring	Knowledge K1.1.1 Evaluate theories of organisational strategies and review own organisations strategy in the context of these K1.1.2 Analyse own organisations strategy for resource and supply chain management K1.1.3 Analyse own organisations strategy for workforce development K1.1.4 Interpret key principles of sustainability within own organisation	Portfolio: include evidence that show that the candidate has understood and applied relevant organisational theories. Evidence must demonstrate that the candidate is able to apply theory to support the development,

Topic	Learning Outcome	Assessment Criteria	Assessment Method
	and evaluation, and quality assurance	K1.1.5 Evaluate risk management models and review own organisations approach to the identification and monitoring of risk K1.1.6 Evaluate quality assurance models in the context of own organisation	implementation and monitoring of organisational strategies and plans Work-based project: set within the context of own organisation's strategy and make efficient use of resources available Interview: test knowledge and understanding of organisational strategy and the application of this
	K1.2 How to manage change in the organisation	K1.2.1 Critically evaluate change management models K1.2.2 Apply relevant model(s) to effectively manage substantial change in a select area of own organisation	
	S1.3 Support the development of organisational strategies and plans	Skills S1.3.1 Review own organisation's strategies and plans and support further development of these	
	S1.4 Develop and deliver operational plans; set targets and key performance indicators, manage resources, and monitor and measure outcomes to establish operational effectiveness, efficiencies and excellence	S1.4.1 Develop operational plan to include realistic, measurable targets and key performance indicators S1.4.2 Demonstrate effective delivery of operational plan S1.4.3 Identify and manage appropriate resources to deliver plan S1.4.4 Accurately monitor and measure outcomes and evaluate results	

Topic	Learning Outcome	Assessment Criteria	Assessment Method
	S1.5 Produce reports that clearly present information and data, using a range of interpretation and analytical processes	S1.5.1 Construct a range of detailed management reports and analyse and interpret these	
	S1.6 Gain wide support to deliver successful outcomes	S1.6.1 Deliver successful outcomes demonstrating the effective use of wide support from a range of sources.	
2. Project Management	K2.1 How a project moves through planning, design, development, deployment and evaluation	Knowledge K2.1.1 Analyse the key stages of a project and demonstrate the application of these	Portfolio: include evidence obtained using a range of assessment methods to show that the candidate has understood the project, the management process and has successfully applied this to produce positive outcomes Work-based project: will follow the principles of project management as appropriate Interview: will test knowledge and

Topic	Learning Outcome	Assessment Criteria	Assessment Method
			understanding of project management and how the candidate has applied this to achieve successful outcomes
	K2.2 Risk management models and reporting, risk benefit analysis and health and safety implications	K2.2.1 Evaluate risk management models and risk versus benefit K2.2.2 Present methods of reporting and monitoring risk, including health and safety, and the mitigation of identified risks	
	S2.3 Plan, organise and manage resources in order to achieve organisational goals	Skills S2.3.1 Exhibit the effective planning, organisation, and management of identified resources, demonstrating how this contributes to the achievement of project goals	
	S2.4 Identify key outcomes, develop and implement plans and monitor progress, and provide reports as required	S 2.4.1 Identify key project outcomes, developing and implementing plans to ensure that these are achieved S2.4.2 Monitor progress towards the achievement of project outcomes and produce reports that clearly demonstrate this	
	S2.5 Proactively identify risk and create plans for their mitigation	S2.5.1 Select and apply a risk management model to project, identifying and monitoring risks and actions to mitigate of these	

Topic	Learning Outcome	Assessment Criteria	Assessment Method
	S2.6 Initiate, lead and drive change within the organisation, identifying barriers/challenges and how to overcome them	S2.6.1 Initiate, lead and drive change within a specific area of own organisation, identifying barriers/ challenges and presenting strategies to overcome these	
	S2.7 Use widely recognised project management tools	S2.7.1 Demonstrate the successful use of project management tools	
3. Business Finance	K3.1 Financial strategies, including budgets, financial management and accounting, and how to provide financial reports	Knowledge K3.1.1 Evaluate the importance of strategic financial management in relation to the organisational strategy K3.1.2 Assess the key elements of financial planning and review K3.1.3 Create and analyse financial reports	Portfolio: include evidence obtained using a range of assessment methods to show that the candidate has an understanding of financial management, is able to apply this and analyse financial data and draw conclusions Work-based project: include financial
	K3.2 Approaches to procurement and contracting, and legal requirements	K3.2.1 Evaluate the use of procurement and contracting and analyse their use within the context of own organisation K3.2.2 Assess the legal requirements around procurement and contracting and how to comply with these	

Topic	Learning Outcome	Assessment Criteria	Assessment Method
	K3.3 Commercial context in an organisational setting and how this changes over time	K3.3.1 Assess the commercial context that own organisation operates within	considerations as appropriate Interview: test knowledge and understanding of business finance and how this has been effectively utilised by the candidate
	S3.4 Manage budgets, control expenditure and produce financial reports	<p>Skills</p> <p>S3.4.1 Identify how a budget can be produced taking into account financial constraints and achievement of targets, legal requirements and accounting conventions</p> <p>S3.4.2 Demonstrate competent management of a budget ensuring control over expenditure in accordance with targets</p> <p>S3.4.3 Access financial data, assess its validity and produce clear financial reports that analyse data and draw conclusions</p>	
4. Sales and Marketing	K4.1 How to create marketing and sales strategies	<p>Knowledge</p> <p>K4.1.1 Evaluate sales and marketing theories to inform strategy</p> <p>K4.1.2 Assess methods for setting sales and marketing objectives</p> <p>K4.1.3 Explain methods for applying and monitoring the implementation of a sales and marketing plan</p>	Portfolio: include evidence obtained using a range of assessment methods to show that the candidate has understood sales and marketing theories and

Topic	Learning Outcome	Assessment Criteria	Assessment Method
	K4.2 How to segment and target relevant markets and customers (global and local), analysis of opportunities and ways to market	K4.2.1 Critically evaluate types of market segmentation and apply to own organisation's customer base K4.2.2 Analyse segments in relation to own organisation and propose a strategy to assist targeting	methods, and is able to analyse and use data to meet customer needs Work-based project: consider sales and marketing as appropriate Interview: test knowledge and understanding of sales and marketing and how the candidate has applied this to achieve beneficial results
K4.3 The need for innovation in product and service design	K4.3.1 Explain the importance of innovation in product and design K4.3.2 Analyse approaches to innovation employed by own organisation making recommendations as appropriate		
S4.4 Use customer insight and analysis of data to determine and drive customer service outcomes and improve customer relationships	Skills S4.4.1 Analyse sources of information for customer insight and data S4.4.2 Demonstrate use of customer insight and data to determine and drive customer service outcomes and improve customer relationships		
S4.5 Use creative approaches to developing solutions to meet customer needs	S4.5.1 Demonstrate use of creative approaches in developing a range of solutions to meet customer needs and review the effectiveness of these		

Topic	Learning Outcome	Assessment Criteria	Assessment Method
5. Digital business and new technologies	K5.1 Approaches to innovation and digital technologies and their impact on organisations, and how their application can be used for organisational improvement and development	Knowledge K5.1.1 Critically evaluate the impact of innovation and digital technologies on organisations K5.1.2 Evaluate the use of these for organisational development K5.1.3 Review the use of innovation and digital technologies in own organisation and make recommendations for improvement	Portfolio: include evidence obtained using a range of assessment methods to show that the candidate has understood the use of innovation and digital technologies and the use of data and knowledge management Work-based project: include innovation and digital technologies as appropriate Interview: test knowledge and understanding of the
	K5.2 Innovation and digital technology's impact on data and knowledge management for analysing business decision-making	K5.2.1 Analyse the impact of innovation and digital technologies on data and knowledge management K5.2.2 Demonstrate how this can be utilised for making business decisions	

Topic	Learning Outcome	Assessment Criteria	Assessment Method
	S5.3 Identify service/organisational improvements and opportunities for innovation and growth, using qualitative and quantitative analysis of information and data and benchmarking against others	<p>Skills</p> <p>S5.3.1 Demonstrate the use of qualitative and quantitative analysis of information to identify service/ organisational improvements and opportunities for innovation and growth</p> <p>S5.3.2 Analyse information and data to benchmark against others</p>	application of innovation, digital technologies, data and knowledge management to business
Interpersonal excellence – leading people and developing collaborative relationships			
6. Communication	K6.1 Different forms of communication (written, verbal non-verbal, digital) and how to apply them	<p>Knowledge</p> <p>K6.1.1 Evaluate different types of communication and the application of these analyse their strengths and weaknesses in different contexts</p>	Portfolio: include evidence obtained using a range of assessment methods to show that the candidate is able to use all forms of communication appropriately and effectively, and
	K6.2 How to maintain personal presence and present to large groups	<p>K6.2.1 Determine how to maintain personal presence</p> <p>K6.2.2 Prepare and present successfully to large groups</p>	

Topic	Learning Outcome	Assessment Criteria	Assessment Method
	K6.3 Interpersonal skills awareness including effective listening, influencing techniques, negotiating and persuasion	K6.3.1 Analyse own interpersonal skills and take responsibility to further develop of these	demonstrate high level interpersonal skills in a variety of contexts Work-based project: well-structured and demonstrates good written presentation skills
	S6.4 Communicate clearly, effectively and regularly using oral, written and digital channels and platforms	Skills S6.4.1 Show effective and appropriate use of all forms of communication	Interview: review the candidate's communication style and their ability to influence and negotiate
	S6.5 Use active listening and open questioning to structure conversations and discussions, and able to challenge when appropriate	S6.5.1 Use active listening and open questioning to structure conversations and discussions and demonstrate the use of these to challenge others when appropriate	
	S6.6 Manage and chair meetings and clearly present actions and outcomes	S6.6.1 Demonstrate confident and effective chairing of meetings including preparation and follow up	

Topic	Learning Outcome	Assessment Criteria	Assessment Method
	S6.7 Apply influencing and persuading skills, to the dynamics and politics of personal interactions	S6.7.1 Effectively apply influencing and persuading skills to the dynamics and politics of personal interactions	
7. Leading People	K7.1 Different inclusive leadership styles and models, how to develop teams and support people using coaching and mentoring approaches	Knowledge K7.1.1 Evaluate a range of leadership styles and models to include inclusive leadership K7.1.2 Know own leadership style and how to adapt to situations K7.1.3 Evaluate the use of coaching and mentor	Portfolio: include evidence obtained using a range of assessment methods to show that the candidate has understood the impact of leadership on culture and is able to lead and coach people Work-based project: include leading people as appropriate Interview: test knowledge and understanding of leadership and own
	K7.2 Organisational culture and diversity management	K7.2.1 Evaluate types of organisational culture and how these are created K7.2.2 Explain diversity management and review approach in own organisation	
	S7.3 Articulate organisational purpose and values	Skills S7.3.1 Explain purpose and values and analyse how effectively these are communicated and articulated in own organisation	

Topic	Learning Outcome	Assessment Criteria	Assessment Method
	S7.4 Support the creation of an inclusive, high performance work culture	S7.4.1 Take actions that support the creation of an inclusive work culture S7.4.2 Take actions that support the creation of an high performance work culture	leadership style, how this can be used to affect performance
	S7.5 Enable others to achieve by developing and supporting them through coaching and mentoring	S7.5.1 Enable others to achieve by developing and supporting them through coaching and mentoring	
8. Managing People	K8.1 How to recruit, manage and develop people, using inclusive talent management approaches	Knowledge K8.1.1 Explain recruitment strategies and review the effectiveness of own organisation's strategy K8.1.2 Examine inclusive talent management approaches and how this can be used to recruit, manage, and develop people K8.1.3 Analyse the use of inclusive talent management within own organisation	Portfolio: include evidence obtained using a range of assessment methods that the candidate has understood and can apply inclusive approaches to recruitment and management to meet organisational needs
	K8.2 How to use HR systems and processes to ensure legal requirements, health and safety, and wellbeing needs	K8.2.1 Discuss the use of HR systems and processes to ensure legal requirements, health and safety, and well-being needs are met	

Topic	Learning Outcome	Assessment Criteria	Assessment Method
	K8.3 How to set goals and manage performance	K8.3.1 Critically evaluate goal setting theories and models K8.3.2 Set realistic achievable goals for others, monitoring and managing progress towards these	<p>Work-based project: include managing people as appropriate</p> <p>Interview: test knowledge and understanding of people management</p>
	S8.4 Build teams, empower and motivate others to improve performance or achieve outcomes	<p>Skills</p> <p>S8.4.1 Demonstrate successful team building skills to significantly empower and motivate others</p>	
	S8.5 Delegate to others, provide clear guidance and monitor progress	S8.5.1 Identify and delegate tasks to others, demonstrating the provision of clear guidance and the effective monitoring of progress to achieve positive results	
	S8.6 Set goals and accountabilities	S8.6.1 Set realistic goals for others and ensure accountability	

Topic	Learning Outcome	Assessment Criteria	Assessment Method
9. Developing Collaborative Relationships	K9.1 Approaches to stakeholder, customer and supplier management, developing engagement, facilitating cross functional working and negotiation	<p>Knowledge</p> <p>K9.1.1 Describe the principles of stakeholder, customer and supplier engagement and management</p> <p>K9.1.2 Analyse stakeholder, customer and supplier engagement and management in own organisation and identify strategies for improvement</p> <p>K9.1.3 Explain the benefits and challenges of cross-functional working and apply this method of working to deliver positive results</p> <p>K9.1.4 Evaluate negotiation strategies and practice these</p>	<p>Portfolio: include evidence obtained using a range of assessment methods to show that the candidate has understood collaborative relationships and has put these into practice</p> <p>Work-based project: include collaborative relationships as appropriate</p> <p>Interview: test knowledge and understanding of developing and sustaining collaborative relationships</p>
	K9.2 How to shape common purpose, as well as approaches to conflict	<p>K9.2.1 Explain methods for shaping common purpose</p> <p>K9.2.2 Evaluate models of conflict management and resolution and successfully apply these</p>	
	S9.3 Build rapport and trust, develop networks and maintain relationships with people from a range of cultures, backgrounds and levels	<p>Skills</p> <p>S9.3.1 Develop and maintain networks and relationships</p> <p>S9.3.2 Build rapport and trust, demonstrating how this takes place with all people including those from different cultures, backgrounds and levels</p>	
	S9.4 Contribute within a team environment	S9.4.1 Demonstrate useful contributions to a team environment	

Topic	Learning Outcome	Assessment Criteria	Assessment Method
	S9.5 Effectively influence and negotiate, being able to have challenging conversations and give constructive feedback	S9.5.1 Demonstrate effective negotiation and influencing skills S9.5.2 Manage difficult conversations and give constructive feedback	
	S9.6 Work collaboratively with internal and external customers and suppliers	S9.6.1 Demonstrate collaborative working with internal customers S9.6.2 Demonstrate collaborative working with external customers and suppliers.	
Personal effectiveness – managing self			
10. Awareness of self and others	K10.1 How to be self-aware and recognise different learning styles	Knowledge K10.1.1 Evaluate theories of learning styles and apply to self and others	Portfolio: include evidence obtained using a range of assessment methods to show that the candidate is aware of self and others has plans for self-development that will enhance impact Work-based project: demonstrate effective
	K10.2 How to use emotional and social intelligence, and active listening and open questioning to work effectively with others	K10.2.1 Evaluate models of emotional intelligence and their use in the workplace K10.2.2 Evaluate the concept of social intelligence and its use in the workplace K10.2.3 Explain the importance of active listening and open questioning and demonstrate their uses in working with others	

Topic	Learning Outcome	Assessment Criteria	Assessment Method
	S10.3 Reflect on own performance, identifying and acting on learning and development needs	Skills S10.3.1 Analyse own performance, identifying learning and development needs S10.3.2 Devise and implement strategies to address learning and development needs	management of self as appropriate Interview: test the candidate's self-awareness, impact upon others, and strategies for development of self
	S10.4 Understand impact on others	S10.4.1 Explain factors that influence impact on others, both positive and negative, and demonstrate a positive impact on others	
	S10.5 Manage stress and personal well-being, being confident in knowing core values and drivers	S10.5.1 Determine and apply stress management techniques in the workplace to ensure personal well-being S10.5.2 Demonstrate confidence in knowledge of core values and reflect these in own performance	
11. Management of Self	K11.1 How to manage time, set goals, prioritise activities and undertake forward planning in a business environment with a focus on outcomes	Knowledge K11.1.1 Assess a broad range of techniques for managing time K11.1.2 Review own time management skills and create and implement strategies to improve K11.1.3 Evaluate goal setting theories and models K11.1.4 Set achievable goals/objectives for self and monitor progress towards these	Portfolio: include evidence obtained using a range of assessment methods to show that the candidate can effectively manage self and

Topic	Learning Outcome	Assessment Criteria	Assessment Method
	S11.2 Create a personal development plan, and use widely recognised tools and techniques to ensure the management of time and pressure effectively, and prioritisation and strategic alignment of activities	Skills S11.2.1 Demonstrate use of time management techniques and tools S11.2.2 Effectively manage own workload to achieve objectives S11.2.3 Align personal development objectives to the organisational strategy S11.2.4 Demonstrate on-going commitment to personal development	demonstrated plans for self-improvement Work-based project: demonstrate effective management of self to complete this Interview: test the candidate's management of self, including self-development, and plans to maintain ongoing CPD
12. Decision Making	K12.1 How to undertake research, data analysis, problem solving and decision-making techniques	Knowledge K12.1.1 Critically evaluate research methods and the types of data generated K12.1.2 Analyse complex data and draw sensible conclusions K12.1.3 Evaluate and apply problem solving techniques K12.1.4 Evaluate and apply decision making techniques	Portfolio: include evidence obtained using a range of assessment methods to show that the candidate is able to use strategies to solve problems and make decisions Work-based project: demonstrates factors affecting problem solving
	K12.2 The values, ethics and governance of your organisation	K12.2.1 Describe and evaluate the values and ethics of your organisation K12.2.2 Review the impact of the governance of your organisation in terms of the decision making process	

Topic	Learning Outcome	Assessment Criteria	Assessment Method
	S12.3 Use evidence-based tools and ethical approaches to undertake problem solving and critical analysis, synthesis and evaluation to support decision making	Skills S12.3.1 Demonstrate the use of evidence based tools to solve problems S12.3.2 Demonstrate the consistent use of critical analysis, synthesis and evaluation to support decision making S12.3.3 Use ethical approaches in problem solving and decision making	and decision making as appropriate Interview: test knowledge and understanding of decision making and how the candidate utilises information to inform this

Behaviours required (developed and exhibited in the workplace)	Assessment Method
Takes responsibility <ul style="list-style-type: none"> • Drive to achieve in all aspects of work • Demonstrates resilience and determination when managing difficult situations • Seeks new opportunities underpinned by commercial acumen and sound judgement 	Portfolio will include evidence obtained using a range of assessment methods 360 degree feedback from others to show that the candidate has demonstrated these behaviours Interview may scrutinise and require examples of when and how the candidate demonstrates these behaviours

Inclusive

- Open, approachable, authentic, and able to build trust with others
- Seeks the views of others and values diversity internally and externally

Portfolio will include evidence obtained using a range of assessment methods including 360 degree feedback from others to show that the candidate has demonstrated these behaviours.

Interview may scrutinise and require examples of when and how the candidate demonstrates these behaviours

Agile

- Flexible to the needs of the organisation
- Is creative, innovative and enterprising when seeking solutions to business needs
- Positive and adaptable, responding well to feedback and need for change
- Open to new ways of working and new management theories

Portfolio will include evidence obtained using a range of assessment methods including 360 degree feedback from others to show that the candidate has demonstrated these behaviours

Interview may scrutinise and require examples of when and how the candidate demonstrates these behaviours

Professionalism

- Sets an example, and is ethical, fair, consistent and impartial
- Operates within organisational values and adheres to the requirements of relevant professional bodies

Portfolio will include evidence obtained using a range of assessment methods including 360 degree feedback from others to show that the candidate has demonstrated these behaviours.

Interview may scrutinise and require examples of when and how the candidate demonstrates these behaviours

Portfolio and Work based project descriptors	
Merit level descriptor	Distinction level descriptor
Clear evidence that original critical thinking, analysis and evaluation are used to inform decisions.	Critical evaluation and justification of decisions and actions when managing complex and/or difficult situations, with reflection on outcomes.
Clear evidence of applying organisational values, ensuring they are woven into everyday working and consideration of their impact, and Creates an environment enabling staff to engage with each other productively and efficiently.	Ensures sustainable integration of organisational, staff, customer and societal concerns into organisational strategy.
Demonstrates self-directed adaptability showcasing a range of leadership and communication styles appropriate to the situation. Evidences understanding of complex issues in a number of business areas and makes clear recommendations as to how solutions could be managed.	Communicates and justifies complex plans, tasks and processes in a clear, concise and easily understandable manner, and Innovative application of theories, principles and concepts that advance organisational change and development.
Acts as a role model, providing vision, inspiration and direction to others, and Exhibits drive and energy beyond that required to achieve the outputs required of their role; for example, sought information and guidance from those beyond immediate work perimeter in order to achieve excellence in work.	Evidences complex examples of adaptability of leadership style and theory across all stakeholders with justification as to why the change is required and anticipated outcomes.

Identifies and acts upon new opportunities based on analytical commercial considerations and backed by sound justifications and evidence to accelerate organisation's performance.

Develops and influences the organisation's strategic direction demonstrating ability to future proof, **and**

Improvements impact beyond immediate role and responsibilities.

Useful Information

ILM links

EPA Assessment enquiries	EPAassessor@cityandguilds.com
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ILM New Apprenticeship Standards webpage	www.i-l-m.com/Learning-and-Development/management-apprenticeships
Walled Garden	www.walled-garden.com

External links

Apprenticeship Standards	https://www.instituteforapprenticeships.org/apprenticeship-standards/chartered-manager/
Institute for Apprenticeships and Technical Education	https://www.instituteforapprenticeships.org/
Education and Skills Funding Agency (ESFA)	www.gov.uk/government/organisations/education-and-skills-funding-agency

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