

City & Guilds Level 7 End-point Assessment for Apprenticeship Senior Leader (9311-22)

Standard: ST0480

EPA Plan: Version 1.2

QN: 610/0347/5

EPA Pack for Providers and Employers

Version 1.0

Last modified February-2025

For external use



Version	Summary of changes	Section
1.0 February 2025	Document Created	

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1. Apprenticeships



This pack will help providers and employers prepare apprentices for the End-point Assessment (EPA) of their City & Guilds Level 7 End-point Assessment for Apprenticeship Senior Leader (9311-22). It explains how apprentices will demonstrate the knowledge, skills and behaviours (KSBs) which they developed during their apprenticeship.

This pack must be used alongside the:

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

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

- Using the EPA Pro portal
- The process for booking EPA
- Acceptable qualifications and certificates at Gateway
- Uploading files to the EPA Pro portal
- Use of electronic signatures
- Knowledge tests on evolve (where applicable)
- Responsibilities of providers and employers
- The Quality Assurance process

Full-time apprentices will typically spend 2 years on-programme working towards meeting the Standard, with required off-the-job training as specified by the apprenticeship funding rules. The employer should ensure that the apprentice has access to development opportunities to gain the KSBs, as outlined in the Standard, and must hold regular progress reviews with the provider and apprentice.

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

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

- Strategic Business Proposal, Presentation with Questioning
- Professional Discussion, underpinned by a Portfolio of Evidence

Preparing for EPA

In preparation for EPA, providers and employers should:

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

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

- explain the assessments and **Recording Forms** to the apprentice – refer to details in the Assessment Instructions sections of this pack
- agree a realistic timeframe for submission of evidence that meets the EPA deadlines – any delays in submission of evidence will delay the assessments
- make sure the apprentice has the resources and time to prepare for, and undertake, EPA
- take the apprentice through some mock assessments
- share the [EPA Preparation Guide](#) with the apprentice, which includes information about system requirements for virtual meetings

- let ILM/City & Guilds know if access arrangements are required to support an apprentice through EPA. Information about ILM/City & Guilds access arrangements, including reasonable adjustments is on the ILM/City & Guilds website, under [EPA Documents Library](#).

Authenticating the apprentice's work

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

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

The employer/provider should also aid authentication by:

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

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

City & Guilds Position Statement on artificial intelligence

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

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

Health & Safety and Codes of Practice

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

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

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

Results submission and feedback

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

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

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

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

Professional recognition

This apprenticeship Standard is designed to prepare successful apprentices to meet the requirements for application as a Fellow with The Institute of Leadership & Management.

City & Guilds Limited

Successful completion of this EPA will lead to Membership of City & Guilds Limited. The apprentice will be eligible to use the post nominals MCGI.

Statement of Achievement

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

The overall apprenticeship certificate will be issued by the IfATE.

Digital credentials

A digital credential is a verified, visual representation of knowledge and skills earned in various learning environments. Please see an example below:



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

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

2. The apprenticeship Standard

Occupation summary

This occupation is found in small, medium and large organisations in the public, private or third sectors and sustainability as an area of the economy including health, finance, engineering, manufacturing, business and professional services, education, retail, leisure, technology and construction. Senior Leaders are a key component of all types of business model where there is a workforce to lead, manage and support. The broad purpose of the occupation is to provide clear, inclusive and strategic leadership and direction relating to their area of responsibility within an organisation. Typically, this involves setting, managing and monitoring achievement of core objectives that are aligned to the overall strategic objectives of their organisation's Board (or equivalent). In a smaller organisation they are also likely to contribute to the execution and achievement of these strategic objectives. A Senior Leader influences at a higher organisational level, including sometimes at Board (or equivalent) level, and sets the culture and tone across their area of responsibility. They may work in varied environments including in an office, onsite, or remotely and demonstrate a high level of flexibility and adaptability to meet the needs of the organisation. In their daily work, an employee in this occupation interacts with internal stakeholders such as members of their team, other senior leaders/managers, support services (for example: finance, marketing, HR) and project groups and, in larger organisations, they may be part of a wider specialist team. Depending on the size of their organisation, a Senior Leader may be responsible for reporting results relating to their area of responsibility to a Board, trustees, shareholders, executive team or to other senior management within the organisation. Externally, a Senior Leader acts as an ambassador for their organisation with wide-ranging networks typically involving customers/clients, supply chains and statutory/regulatory bodies. An employee in this occupation will be responsible for:

- Setting direction, vision, governance and providing a clear sense of purpose for their area of responsibility.
- Providing clear and inclusive leadership.
- Identifying longer-term opportunities and risks using data from internal intelligence sources and external influences.
- Developing sustainable, ethical, innovative and supportive cultures that get the best from people and enable the delivery of results.
- Resources that may include budgets, people, assets and facilities.
- Staying up to date with innovation and championing its adoption.
- Keeping pace with - and responding to change - by leading agile transformation.



- Leading and promoting sustainable business practices.
- Responding and managing crisis situations.

Occupational duties

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

Duty	KSBs & Assessment Method
Duty 1 Set the overall strategic direction of their area of responsibility in partnership with the Board (or equivalent), encouraging employees to buy into the organisation's vision.	Strategic Business Proposal: K14, S2, S11
	Professional Discussion: K1, K2, K13, S1, S10, B2
Duty 2 Lead on the development and critical review of operational policies and practices within their area of responsibility, to ensure they are aligned to the needs of the organisation and remain fit for purpose and sustainable.	Strategic Business Proposal: K16, S2, S11
	Professional Discussion: K2, K6, K19, S7, S10, B2
Duty 3 Lead and influence agreed projects to deliver organisational strategy such as change and agile transformation programmes, diversification, new product implementation, and customer experience improvement.	Strategic Business Proposal: K3, K5, K14, K15, S2, S3, B3
	Professional Discussion: K6, K7, S4, B2
Duty 4 Make decisions about organisational resource requirements (budgets, people, technology) based on strategic insight and reliable evidence.	Strategic Business Proposal: K8, K9, S11
	Professional Discussion: K4, K6, K7, S5, S7, S10, S12, B2
Duty 5 Lead and respond to crisis management, assessing the risks and opportunities which could affect	Strategic Business Proposal: K5

business/department performance, and finding solutions that meet the needs of both the organisation and its customers/stakeholders in a responsible and ethical way.	Professional Discussion: K6, K17, K19, S4, S5, S8, B1
Duty 6 Lead people development including talent management, succession planning, workforce design, and coaching, and mentoring arrangements for people within their area of responsibility.	Strategic Business Proposal: S2, S13
	Professional Discussion: K6, K10, K11, K18, S9, S14, S15, S16, S18, B1, B4, B5
Duty 7 Promote an ethical, inclusive, innovative, and supportive culture that generates continuous business improvement.	Strategic Business Proposal: S13
	Professional Discussion: K6, K10, K11, S4, S9, S14, S15, S16, S17, S18, B1, B4, B5
Duty 8 Report to the Board (or relevant governance/management structure) on the progress of their operational activities towards achieving business goals.	Strategic Business Proposal: K12, S19, S20
	Professional Discussion: K13, B1
Duty 9 Cultivate and maintain collaborative relationships with key senior internal and external stakeholders to influence key decision makers as appropriate.	Strategic Business Proposal: K12, S2, S19
	Professional Discussion: K4, K7, K13, S6, B1
Duty 10 Shape the approach to external communications for their area of responsibility and ensure it aligns with any wider organisational communications strategy.	Strategic Business Proposal: K15, S2
	Professional Discussion: K20, S21, B1
Duty 11 Proactively keep up to date with social, economic and technological trends and developments relevant to their	Strategic Business Proposal: K3, S3, S13, B3

<p>area of responsibility and wider organisation and promote innovation to address changing requirements and to take advantage of new opportunities.</p>	<p>Professional Discussion: K4, K7, K19, S4, S7, S9</p>
<p>Duty 12 Ensure that their area of responsibility is compliant with internal governance, such as any assurance framework requirements, and with external governance, such as any regulatory and statutory requirements.</p>	<p>Strategic Business Proposal: K9, S3, B3</p>
	<p>Professional Discussion: K2, S8, S12</p>

Knowledge, skills and behaviours

Knowledge	Assessment Method
K1: How to shape organisational mission, culture, and values.	Professional Discussion
K2: Organisation structures; business modelling; diversity; global and horizon scanning perspectives; governance and accountability; technological and policy implications.	Professional Discussion
K3: New market strategies, changing customer demands and trend analysis.	Strategic Business Proposal
K4: Innovation; the impact of disruptive technologies (mechanisms that challenge traditional business methods and practices); drivers of change and new ways of working across infrastructure, processes, people and culture and sustainability.	Professional Discussion
K5: Systems thinking, knowledge/data management, research methodologies and programme management.	Strategic Business Proposal
K6: Ethics and values-based leadership theories and principles.	Professional Discussion
K7: Competitive strategies and entrepreneurialism, approaches to effective decision making, and the use of big data and insight to implement and manage change.	Professional Discussion
K8: Financial strategies, for example scenarios, modelling and identifying trends, application of economic theory to decision-making, and how to evaluate financial and non-financial information, such as the implications of sustainable approaches.	Strategic Business Proposal
K9: Financial governance and legal requirements, and procurement strategies.	Strategic Business Proposal
K10: Organisational/team dynamics and how to build engagement and develop high performance, agile and collaborative cultures.	Professional Discussion

K11: Approaches to strategic workforce planning, for example, talent management, learning organisations, group work, workforce design, succession planning, diversity and inclusion.	Professional Discussion
K12: Influencing and negotiating strategies both upwards and outwards.	Strategic Business Proposal
K13: The external social and political environment and use of diplomacy with diverse groups of internal and external stakeholders.	Professional Discussion
K14: Working with board and other company leadership structures.	Strategic Business Proposal
K15: Brand and reputation management.	Strategic Business Proposal
K16: Working with corporate leadership structures, for example, the markets it operates in, roles and responsibilities, who its stakeholders are and what they require from the organisation and the sustainability agenda.	Strategic Business Proposal
K17: Crisis and risk management strategies.	Professional Discussion
K18: Coaching and mentoring techniques.	Professional Discussion
K19: Approaches to developing a Corporate Social Responsibility programme.	Professional Discussion
K20: The organisation's developing communications strategy and its link to their area of responsibility.	Professional Discussion

Skills	
S1: Use horizon scanning and conceptualisation to deliver high performance strategies focusing on growth/sustainable outcomes.	Professional Discussion
S2: Set strategic direction and gain support for it from key stakeholders.	Strategic Business Proposal
S3: Undertake research, and critically analyse and integrate complex information.	Strategic Business Proposal
S4.1: Lead change in their area of responsibility, create an environment for innovation and creativity. S4.2: Establish the value of ideas and change initiatives and driving continuous improvement.	Professional Discussion
S5: Lead and respond in a crisis situation using risk management techniques.	Professional Discussion
S6: Act as a Sponsor/Ambassador, championing projects and transformation of services across organisational boundaries, such as those impacted by sustainability and the UK Net Carbon Zero by 2050 target.	Professional Discussion
S7: Challenge strategies and operations in terms of ethics, responsibility, sustainability, resource allocation and business continuity/risk management.	Professional Discussion
S8: Apply principles relating to Corporate Social Responsibility, Governance and Regulatory compliance.	Professional Discussion
S9: Drive a culture of resilience and support development of new enterprise and opportunities.	Professional Discussion
S10: Oversee development and monitoring of financial strategies and setting of organisational budgets based on Key Performance Indicators (KPIs), and challenge financial assumptions underpinning strategies.	Professional Discussion
S11: Uses financial data to allocate resources.	Strategic Business Proposal

S12: Oversee procurement, supply chain management and contracts, such as consideration of sustainable approaches.	Professional Discussion
S13: Use personal presence and "storytelling" to articulate and translate vision into operational strategies, demonstrating clarity in thinking such as consideration of sustainable approaches.	Strategic Business Proposal
S14: Create an inclusive culture, encouraging diversity and difference and promoting well-being.	Professional Discussion
S15: Give and receive feedback at all levels, building confidence and developing trust, and enable people to take risks and challenge where appropriate.	Professional Discussion
S16: Enable an open culture and high-performance working environment and set goals and accountabilities for teams and individuals in their area.	Professional Discussion
S17: Lead and influence people, building constructive working relationships across teams, using matrix management where required.	Professional Discussion
S18: Optimise skills of the workforce, balancing people and technical skills and encouraging continual development.	Professional Discussion
S19: Manage relationships across multiple and diverse stakeholders.	Strategic Business Proposal
S20: Lead within their area of control/authority, influencing both upwards and outwards, negotiating and using advocacy skills to build reputation and effective collaboration.	Strategic Business Proposal
S21: Shape and manage the communications strategy for their area of responsibility.	Professional Discussion

Behaviours	
B1: Work collaboratively enabling empowerment and delegation.	Professional Discussion
B2: Take personal accountability aligned to clear values.	Professional Discussion
B3: Curious and innovative - exploring areas of ambiguity and complexity and finding creative solutions.	Strategic Business Proposal
B4: Value difference and champion diversity.	Professional Discussion
B5: Seek continuous professional development opportunities for self and wider team.	Professional Discussion

Overall grade

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

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

All assessment methods are weighted equally in their contribution to the overall EPA grade. Performance in the EPA will determine the apprenticeship grade of Fail, Pass or Distinction.

Grades from individual assessment methods should be combined in the following way to determine the grade of the EPA as a whole:

Assessment Method 1: Strategic Business Proposal, Presentation with Questioning	Assessment Method 2: Professional Discussion, underpinned by a Portfolio of Evidence	Overall Grade
Fail	Fail	Fail
Pass	Fail	Fail
Fail	Pass	Fail
Distinction	Fail	Fail
Fail	Distinction	Fail
Pass	Pass	Pass
Distinction	Pass	Pass
Pass	Distinction	Pass
Distinction	Distinction	Distinction

The overall EPA grade must be capped at a Pass if the apprentice has had to resit or retake any assessment method. If the apprentice needs to re-sit or retake any assessment component, the maximum grade they can achieve for that component is a pass.

3. Gateway

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



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

The apprentice must provide the following at Gateway:

- A Strategic Business Proposal 500-word Summary with the subject, title, and scope of the Proposal. **This will be reviewed by the IEPA to confirm its suitability**
- A Portfolio of Evidence, with a City & Guilds Evidence Matrix, and Declaration of Authenticity
- Evidence of achievement of Level 2 English and Level 2 Mathematics either before or during their apprenticeship (*see note below)

* For apprentices with an Education, Health and Care Plan (EHC) or a legacy statement, the English and mathematics minimum requirement is Entry Level 3. British Sign Language (BSL) qualifications are an alternative to English qualifications for those for whom BSL is their primary language.

The following should be completed on the EPA Pro platform:

- Gateway Declaration Form signed by the apprentice
- Gateway Declaration by the provider, on behalf of the employer and tutor, confirming that the apprentice has completed at least 12 months on-programme.

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

At Gateway, the apprentice's portfolio of evidence must be made available for review by the IEPA ahead of the professional discussion. Please note the following requirements:

- All evidence for the portfolio must be available electronically, using formats such as Word, EXCEL, PDF etc.
- Where the apprentice has created their portfolio using an e-portfolio platform, the HEI may choose to upload it directly onto the EPA Pro portal or by providing access to their own e-portfolio system via the EPA Pro portal.
- The portfolio, 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.
- The completed City & Guilds Evidence Matrix must be uploaded to the EPA Pro portal regardless of whether the portfolio is uploaded or access to an e-portfolio is provided. See section 7 of this pack for further information on the portfolio and City & Guilds Evidence Matrix.

ILM will confirm when all the Gateway requirements have been met. **The apprentice can't start EPA until the Strategic Business Proposal 500-word Summary has been agreed by the IEPA.** The Assessment Instruction sections provide detail about the Strategic Business Proposal 500-word Summary and the Portfolio of Evidence.

4. Timetable for End-point Assessment



The EPA period is typically completed within 5 months of the EPA Gateway, starting when ILM/City & Guilds has confirmed that all Gateway requirements have been met.

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

Planning meetings are usually only provided for Standards where they are required by the Assessment Plan. The EPA Partnership Managers can provide additional guidance.

Ongoing during on-programme	Evidence and forms
<p>Provider and employer</p> <ul style="list-style-type: none"> Reviews progress as part of their regular performance management process and ensures apprentice's performance is on track Identifies any gaps and creates a plan with the apprentice Enrols apprentice on EPA Pro and provides 'Expected Date Ready for EPA' and (optional) 'planning meeting' 	N/A
<p>Apprentice</p> <ul style="list-style-type: none"> Completes the English and maths components of the apprenticeship Gathers evidence for the portfolio 	<p>Start to collate:</p> <ul style="list-style-type: none"> Portfolio of Evidence City & Guilds Portfolio Evidence Matrix
Gateway process	Evidence and forms
<p>Employer</p> <ul style="list-style-type: none"> Reviews progress and ensures the apprentice is ready for EPA Reviews evidence to confirm that it is appropriate and sufficient to meet the Standard 	<p>Signs:</p> <ul style="list-style-type: none"> Portfolio of Evidence Declaration of Authenticity

<ul style="list-style-type: none"> • Confirms the Strategic Business Proposal subject, title, and scope with the apprentice • Supports the apprentice in creating the Strategic Business Proposal 500-word Summary 	
<p>Apprentice</p> <ul style="list-style-type: none"> • Must have been on programme for a minimum of 12 months and one day • Completes and submits evidence and forms 	<p>Submits to provider:</p> <ul style="list-style-type: none"> • Apprentice Gateway Declaration • Strategic Business Proposal 500-word Summary • Portfolio of Evidence • City & Guilds Portfolio Evidence Matrix • Portfolio of Evidence Declaration of Authenticity <p>Evidence of English and maths qualifications</p>
<p>Provider – on EPA Pro</p> <ul style="list-style-type: none"> • Books EPA on the EPA Pro portal, in line with ILM/City & Guilds booking timelines in the EPA Manual • Makes ILM/City & Guilds aware of any additional needs of the apprentice so that they can review reasonable adjustments – see the current policy on the City & Guilds website, under EPA Documents Library • Completes Provider Gateway Declaration on behalf of the employer and tutor • Uploads evidence and forms onto EPA Pro 	<p>Complete on EPA Pro:</p> <ul style="list-style-type: none"> • Provider Gateway Declaration <p>Signs:</p> <ul style="list-style-type: none"> • Declaration of Authenticity <p>Uploads onto EPA Pro:</p> <ul style="list-style-type: none"> • Apprentice Gateway Declaration • Portfolio of Evidence (or access information is provided via the EPA Pro portal in instances where an e-portfolio platform has been used) • City & Guilds Portfolio Evidence Matrix • Portfolio of Evidence Declaration of Authenticity

	<ul style="list-style-type: none"> Strategic Business Proposal 500-word Summary Evidence of English and maths qualifications
IEPA <ul style="list-style-type: none"> Reviews Strategic Business Proposal 500-word Summary and provides the outcome within 3 working days of allocation 	Completes: <ul style="list-style-type: none"> Strategic Business Proposal 500-word Summary Sign-off
City & Guilds EPA Gateway Team <ul style="list-style-type: none"> Formally confirms when the Gateway requirements have been met 	N/A
City & Guilds EPA Team <ul style="list-style-type: none"> Assigns an IEPA who will review and approve/reject the 500-Word Summary Agrees with the provider and IEPA a mutually convenient date for the EPA Events 	N/A
End-point Assessment	Evidence and forms
Apprentice <ul style="list-style-type: none"> Submits Strategic Business Proposal and Presentation materials at least two weeks before the Strategic Business Proposal EPA event (and no more than 12 weeks after Gateway) Completes End-point Assessments 	Submits to provider: <ul style="list-style-type: none"> Strategic Business Proposal City & Guilds Strategic Business Proposal Evidence Matrix Strategic Business Proposal presentation materials Strategic Business Proposal Declaration of Authenticity
Employer <ul style="list-style-type: none"> Ensures the apprentice has access to the resources required for the assessments (see the Resources section) 	Submits to provider: <ul style="list-style-type: none"> Strategic Business Proposal Declaration of Authenticity
Provider <ul style="list-style-type: none"> Submits evidence and forms at least two weeks before the Strategic Business Proposal EPA event (and no more than 12 weeks after Gateway) 	Uploads onto EPA Pro: <ul style="list-style-type: none"> Strategic Business Proposal City & Guilds Strategic Business Proposal Evidence Matrix Strategic Business Proposal presentation materials

	<ul style="list-style-type: none"> Strategic Business Proposal Declaration of Authenticity
IEPA <ul style="list-style-type: none"> Gives the apprentice 4 weeks-notice of the EPA Reviews Portfolio of Evidence, Strategic Business Proposal and presentation materials prior to the EPA events Carries out End-point Assessments Marks each assessment, communicates the results to the LIEPA Provides feedback for assessments in EPA Pro 	Completes: <ul style="list-style-type: none"> IEPA Recording Forms
LIEPA <ul style="list-style-type: none"> Samples and quality assures assessments Confirms overall grade to EPA Team 	Reviews: <ul style="list-style-type: none"> IEPA Recording Forms
City & Guilds EPA Team <ul style="list-style-type: none"> Communicates the results to the provider via EPA Pro Processes the overall result if the apprentice has passed all the assessments and advises IfATE, who issue the certificate. The data will be provided to IfATE once a month, on the fourth working day of the month. 	N/A

Summary timescales

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

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

On programme	Enrol apprentice on epaPRO, including 'expected date ready for EPA' Collate portfolio of evidence
Gateway process	Provider submits evidence and forms on epaPRO Portfolio of Evidence and 500-Word Summary & forms submitted. Provider provides 'Planning Meeting' or 'Assessment' dates. EPA Gateway Team review & confirm Maths & English evidence
Gateway	Assessment components can only be booked after Gateway has been approved
Strategic Business Proposal, presentation with questioning	The strategic business proposal starts after the apprentice has gone through the gateway. The duration of the strategic business proposal should be 12 weeks.
Professional Discussion, underpinned by a Portfolio of Evidence	The independent assessor should have a minimum of 2 weeks to review the contents of the portfolio prior to the professional discussion in order to generate appropriate questions. The apprentice should have at least 4 weeks' notice of the professional discussion.

End-Point Assessment completed

5. End-point Assessment resources

Assessment method	Resources required
Strategic Business Proposal, Presentation, and Questioning	Access to a computer with video-conferencing software which is tested prior to the assessment starting.
	Equipment for the presentation.
	Quiet room, free from distractions and interruptions.
Strategic Business Proposal, Presentation, and Questioning	Access to a computer with video-conferencing software which is tested prior to the assessment starting.
	Quiet room, free from distractions and interruptions

6. Assessment information: 702 Strategic Business Proposal, presentation with questioning

Overview

This assessment method has 2 components:

1. Strategic Business Proposal:
 - a. 500-word Summary
 - b. Strategic Business Proposal
2. Presentation and Questioning

Rationale

Number of questions	6
Grading	P/X/D To achieve a Pass , the apprentice must meet all of the pass descriptors. To achieve a Distinction , the apprentice must meet all of the pass descriptors and all of the distinction descriptors.
Type of assessment	Presentation with Questions
Duration	The presentation will typically last for 20 minutes, and the questioning will typically last for 40 minutes. The discretionary additional 10% time can be allocated in any proportion across the presentation and questioning.
Permitted materials	Notes, Strategic Business Proposal, and a copy of presentation materials available during the Presentation and Questioning.
Location	The presentation with questioning can take place in any of the following: <ul style="list-style-type: none">• employer's premises• a suitable venue selected by the EPAO (for example a training provider's premises)• via video conferencing

Assessment specification

Description	Coverage	Grade
Strategic Business Proposal, Presentation with Questioning	Knowledge: K3, K5, K8, K9, K12, K14, K15, K16 Skills: S2, S3, S11, S13, S19, S20 Behaviours: B3	X/P/D

Assessment instructions

Strategic Business Proposal 500-word Summary

Selecting the subject, title, and scope

The apprentice must agree with their employer the subject, title and scope of a Strategic Business Proposal which reflects the nature of a senior leader's role in an organisation, and then create a Strategic Business Proposal 500-word Summary which is submitted at Gateway.

After Gateway the full Strategic Business Proposal will be developed, using the agreed subject, title, and scope. The employer **must** ensure that it will have a real business application and has the potential to demonstrate the application of KSBs assigned to this EPA as they would naturally occur in practice.

The IEPA will review the summary to confirm that the proposal has the potential to provide suitable coverage of the KSBs assigned to this EPA.

The Strategic Business Proposal may be based on any of the following, or a suitable alternative. The list is not exhaustive and should only be used as a guide:

- The need to review and implement a change plan to improve financial efficiency within the workplace over a 3-year period
- A focus on how they will take the business forward by increasing profits and customers in the next financial year
- The need to implement a direct saving (e.g., percentage decrease in direct costs, reduction in headcount) across their team, department or organisation following a reforecast activity
- A strategic investment in a significant corporate initiative that will have long term benefits to the business, such as:
 - Merging two departments to improve efficiency and effectiveness
 - Implementing virtual triage at an NHS Trust to achieve better demand management
 - Reducing staff turnover within a division to improve attrition and business profitability
 - Improving public awareness of a charitable organisation's aims in order to significantly increase fundraising and donations over a 3-year period

- Implementing a 'greener initiative' to bring products up to an environmentally friendly standard

Preparing the 500-word Summary

The apprentice must submit the Strategic Business Proposal 500-word Summary at Gateway. The summary should:

- Be an electronic document (for example, word-processed document, PowerPoint slides)
- Be no more than 500 words - an example summary is provided below
- Take into account the requirements of the full Strategic Business Proposal
- Include, as a minimum:
 - Subject/title – conveys the strategic objective/activity carried out by a senior leader
 - Scope – goals, business impact and limitations
 - Business need/rationale
 - Stakeholders who will be involved, and their role
 - Anticipated timescales/plan

The Provider Declaration at Gateway includes confirmation on behalf of the employer that the full Strategic Business Proposal will deliver a business benefit and is achievable within the role of the apprentice.

ILM has not provided a form for the summary, so the apprentice can use templates/forms which already exist in their own organisation, or design one of their own. The summary could reflect the employer's usual approach to scoping and defining business proposals.

The IEPA will review the Strategic Business Proposal 500-word Summary to confirm it has the **potential** to meet the assigned KSBs.

If the Strategic Business Proposal Summary is not agreed **the apprentice will not have met the Gateway requirements**. The employer and apprentice must review the summary and submit a revised/new summary on EPA Pro. There is no timescale for completing this.

The apprentice must not start work on the full Strategic Business Proposal until the IEPA has signed-off the Strategic Business Proposal 500-word Summary, and ILM has confirmed that all the Gateway requirements have been met.

In summary, submission at Gateway must include:

- Strategic Business Proposal 500-word Summary

Strategic Business Proposal 500-word Summary (Example)

This example includes notes about where the IEPA has identified the **potential** for this apprentice to provide coverage of the assigned KSBs in their full Strategic Business Proposal.

Proposal to achieve better demand management at an NHS Trust, through the implementation of virtual triage (489 words)

Introduction

The NHS Long Term Plan stressed the need to redesign elective care services in order to achieve better demand management, that improves both patient care and efficiency.

S2 Strategic direction
K3 Changing customer demands and trend analysis
New market strategy.
K8 Modelling and identifying trends.

A key area it focused on was stemming the increasing number of outpatient appointments – for example, last year there were 120 million outpatient appointments (double that of a decade ago). This will be marketed, supported by NHS Elect to other Trusts, teams and specialists.

Scope & Business Impact

I am a Deputy Director/Divisional Manager at XYZ NHS Trust.

In pursuit of this NHS goal, the Trust’s Chief Executive, Chief Operating Officer and Directors have charged me with researching, identifying and trialling virtual triage methods, which will contribute to the Trust’s goal to reduce face-to-face outpatient appointments by 30%, and sustain this level.

This proposal must follow NHS financial processes and procedures and be ratified by the Finance Department to ensure it adheres to NHS procurement processes – and governance and legal requirements.

K14 Board/ leadership structures
K16 Working with corporate leadership structures, sustainability agenda
S2 Strategic direction & support from key stakeholders.

K8 Financial strategies, application of economic theory
K9 Financial governance and legal requirements, & procurement strategies.

Business need/rationale

This innovative approach will entail new referrals being reviewed by a suitably qualified clinician (without the patient being present) prior to booking an outpatient appointment, which has the potential to:

- Avoid inappropriate referrals
- Improve quality of referrals
- Ensure patients see the right person in the right place at their first appointment
- Optimise services
- Prevent unnecessary investigations
- Reserve urgent appointments

B3 Curious and innovative - exploring areas of ambiguity and complexity and finding creative solutions.

K15 Brand & reputation management.

It will contribute to national Key Performance Indicators (KPIs), including:

- Improved patient and staff experience
- Improved efficiency
- Improved clinical quality and patient safety

Local KPIs will include the following:

- Number of referrals triaged
- Outcome of triage (including redirected referrals)
- Patients' and clinicians' feedback

Stakeholders & Research

In line with the NHS 'Elective Care Development Collaborations' methodology, I will form a diverse stakeholder 'whole system team' (including patients, community members and NHS personnel working on other 'redesign of elective care services' initiatives). This will require the use of my influencing and negotiation skills (both upwards and outwards) to gain support and collaboration – particularly from more sceptical colleagues.

K5 Systems thinking, knowledge/data management, research methodologies and programme management
K8 Evaluate information.

K12 Influencing and negotiating
K16 Working with corporate leadership structures
S3 Undertake research, and critically analyse and integrate complex information
S11 Uses financial data to allocate resources.

Nevertheless, it guarantees a systems-based approach to the proposal, due to the team's wide-ranging perspectives and/or skills. Research and analyse virtual triage methods from other trusts; developing a shared understanding of clinical criteria for points of triage along current pathways; and selecting, then adapting a method to suit local circumstances.

S13 Personal presence, translate vision into operational strategies, demonstrating clarity in thinking such as consideration of sustainable approaches.

Implementation Plan: estimated 7 month period

1. Ensure appropriate facilities and workforce capacity (clinical and administrative) for undertaking triaging.

2. Agree processes and protocols for inviting patients to subsequent outpatient appointments.
3. Implement and monitor trial triaging processes.

S20 influencing both upwards and outwards, negotiating and using advocacy skills to build reputation & effective collaboration.

Employer sign-off

It is authorised by the Trust's Senior Leadership Team, who stated that it clearly falls within my role and will deliver both service delivery and economic business benefits.

Conclusion

I am confident that the Strategic Business Proposal will allow me to evidence the full range of knowledge, skills and behaviour required for this assessment.

S19 Manage relationships across multiple stakeholders
S20 Lead within their area of control and authority
B3 Curious and innovative - exploring areas of ambiguity and complexity and finding creative solutions.

Strategic Business Proposal

The Strategic Business Proposal must not be started until the Summary has been signed-off by ILM.

The apprentice develops the Strategic Business Proposal **after Gateway** has been confirmed as completed. The apprentice will:

- Write a Strategic Business Proposal
- Prepare and deliver a Presentation about the Strategic Business Proposal to the IEPA
- Take part in a question and answer session with the IEPA

Following ILM's approval of the Strategic Business Proposal 500-word Summary at Gateway, the apprentice has up to 12 weeks to develop and submit to ILM the Strategic Business Proposal and a copy of the materials for their Presentation. **These must be submitted at least 2 weeks before the EPA with the IEPA, and no more than 12 weeks after the Gateway requirements have been met.**

The employer should ensure the apprentice has sufficient time and the necessary resources within the 12 week period, to plan and undertake the work associated with developing the proposal. The employer and apprentice should agree any elements which will be undertaken outside normal working hours.

The nature of business is that plans change due to internal and external factors, nevertheless the Strategic Business Proposal must reflect the agreed subject, title, and scope.

Structure

The Strategic Business Proposal has a limit of 4,000 words (+/-10% at the apprentice's discretion) excluding tables, graphs, figures, references, and annexes. This provides opportunity to evidence where the apprentice meets the assigned KSBs and grading descriptors.

In order to ensure the Strategic Business Proposal is robust and sufficiently covers the KSBs, it must include:

- Executive Summary
- Scope of the Strategic Business Proposal (including key performance indicators)

- Objectives
- Planning tools such as Gantt charts, risk/issue/mitigation, responsibility assignment matrix (RACI)
- Financial budgeting and resources
- Proposed implementation strategy including communications and stakeholder plans
- Analysis of identified options
- Recommendations and conclusions
- Evidence of organisation's senior level agreement to the implementation of the Strategic Business Proposal, as defined in the organisation's governance structure (as an Appendix)
- A City & Guilds Evidence Matrix mapping the evidence to the KSBs (as an Annex)
- A completed Declaration of Authenticity (as an Annex)

Apprentices, Employers and Providers are reminded that any project proposal submitted with a word count outside of these requirements, or submitted without showing an accurately calculated total word count, will be dealt with as follows:

- Strategic business proposals submitted with fewer than 3600 accurately calculated words will be assessed as submitted, there is no specific penalty for failing to meet the minimum word count requirement. However, apprentices are to be reminded that this shortfall is likely to reduce their opportunity to pass and achieve a higher grade.
- Strategic business proposals submitted with more than 4400 accurately calculated words will be assessed as submitted. However, the IEPA will only consider the first 4400 words and will not assess any content beyond this limit against the grading criteria. There is no specific penalty for exceeding the maximum word count requirement, however, apprentices are to be reminded that this is likely to reduce their opportunity to pass and achieve a higher grade, especially where recommendations and conclusions are included towards the end of the submitted strategic business proposal.

A Generic Specification with a worked example is provided below to support the apprentice in writing the Strategic Business Proposal.

The Strategic Business Proposal **does not** need to be fully implemented during the EPA period, but it must be a comprehensive Strategic Business Proposal that will enable full implementation at an appropriate time for the organisation.

The Strategic Business Proposal should not include hyperlinks. The apprentice must reference all sources using a recognised system.

If the submitted Strategic Business Proposal is above the allowable word count or is not accompanied by the Declaration of Authenticity and Senior Level sign-off it will be returned without being assessed.

Senior level sign-off

In particular, S2 'Set strategic direction and gain support for it from key stakeholders' must be evidenced in the Strategic Business Proposal. Senior level agreement must be included so that this can be discussed during the Presentation (this could be, for example, an email, letter, meeting notes, or similar written confirmation).

Where the apprentice usually acts as the senior decision maker in the organisation, they should include evidence of consultation and engagement with senior colleagues and/or mentors.

Authenticity

The apprentice should complete their Strategic Business Proposal and presentation materials unaided, without further training by the provider. When the Strategic Business Proposal and presentation materials are submitted, the apprentice and employer must verify that they are the apprentice's own work by completing the Declaration of Authenticity.

Preparing evidence for submission

The provider will submit the apprentice's Strategic Business Proposal and presentation materials to EPA Pro at least 2 weeks before the EPA with the **IEPA, and no more than 12 weeks after the Gateway requirements have been met.**

Evidence must be presented as follows:

- Cover title page, including the word count
- With a header or footer containing the apprentice's name
- With a City & Guilds Evidence Matrix mapping the content of the Strategic Business Proposal to the assigned KSBs

A completed City & Guilds Evidence Matrix directs the IEPA to where in the Strategic Business Proposal they can find the apprentice's evidence against the KSBs, enabling the IEPA to review the evidence effectively. The IEPA will review the evidence against the KSBs and relevant grading descriptors.

A City & Guilds Evidence Matrix template is provided. Apprentices can produce their own version, which must include the same content as the matrix provided.

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

Prior to submission, the Strategic Business Proposal must be reviewed by the employer to ensure that:

- All assigned KSBs have evidence against them
- It has been generated after Gateway
- The clarity of any images or scanned evidence is sufficient to determine the quality of the original evidence
- Authenticity of evidence has been established

In summary, submission 2 weeks before Presentation and Questioning must include:

- Strategic Business Proposal
- City & Guilds Strategic Business Proposal Evidence Matrix
- Strategic Business Proposal presentation materials
- Strategic Business Proposal Declaration of Authenticity

KSBs and grading descriptors

A mapping table detailing KSBs assessed using this method and grading descriptors can be found in Appendix 1/1

Grading

The Practical assessment will be graded Fail, Pass or Distinction. The IEPA is fully responsible for making the grading decision. The results will not be shared on the day of the assessment.

Strategic Business Proposal (Example)

Below is a Generic Specification which will support the apprentice in writing the Strategic Business Proposal, and a worked example of how it would evidence the assigned KSBs.

Title: Implement virtual triage at an NHS Trust to achieve better demand management

Generic Specification	KSB elements in bold that would be demonstrated	How coverage of KSBs would be evidenced
<p>Executive Summary</p>	<p>S2 Set strategic direction and gain support for it from key stakeholders.</p>	<p>S2. The strategic direction in this proposal, focuses on the implementation of ‘virtual triage’ as part of the NHS Trust’s commitment to the redesign of elective care services.</p> <p>In summary, if all new referrals are reviewed by a suitably qualified clinician as part of virtual triage, the referral can be directed to the most appropriate place for further assessment, diagnostics and/or treatment. This should mean patients are given the right information and where necessary are seen by the right person, in the right place, first time.</p>
<p>Introduction (provides context of the business need):</p> <ul style="list-style-type: none"> ● Background of Organisation ● Role of the Author 	<p>K3 New market strategies, changing customer demands and trend analysis</p>	<p>K3. NHS Long Term Plan identified the need to stem the increasing number of outpatient appointments (for example, in the last year there were 120 million outpatient appointments – almost double the decade before) through the redesign of elective care services.</p> <p>The author is a Deputy Director/Divisional Manager of a hospital Directorate within an NHS Trust charged by the Trust with implementing critical elements of NHS England’s plan.</p>

<p>Purpose & Scope</p> <p>Including:</p> <ul style="list-style-type: none"> • Key Performance indicators • Problem identification/ business need 	<p>K3 New market strategies, changing customer demands and trend analysis.</p> <p>K5 Systems thinking, knowledge/data management, research methodologies and programme management.</p> <p>K14 Working with board and other company leadership structures.</p> <p>K15 Brand and reputation management.</p> <p>K16 Working with corporate leadership structures, for example, the markets it operates in, roles and responsibilities, who its stakeholders are and what they require from the organisation and the sustainability agenda.</p>	<p>K3. The NHS Long Term Plan stressed that the redesign of elective care services is essential in order to achieve better demand management, which improves both patient care and efficiency.</p> <p>K15. The Royal College of Physicians identified that clinicians are increasingly frustrated with, and fatigued by, growing pressures from waiting lists and overbooked clinics. Moreover, patients are frustrated by poor communication and long waiting times.</p> <p>K14 and K16. NHS England; the local NHS Trust; Directors; Divisional Managers are intrinsically involved in this process.</p> <p>K14, K16 and K5. ‘Stakeholders’ and ‘systems thinking’ are critical elements as the new approach involves the entire Trust (as a whole) and all the associated stakeholders i.e., primary care including GPs; secondary care including general surgeons and clinicians; administrators; and patients.</p>
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Objectives	<p>K14 Working with board and other company leadership structures.</p> <p>K15 Brand and reputation management.</p> <p>K16 Working with corporate leadership structures, for example, the markets it operates in, roles and responsibilities, who its stakeholders are and what they require from the organisation and the sustainability agenda.</p>	<p>K14. Working in accordance with NHS England through the Directors and Divisional Managers of the hospital and NHS Trust.</p> <p>K15. The key objectives all relate to ‘brand and reputation’ including improved patient and staff experience; improved efficiency (such as ‘referral to treatment time’; waiting time for follow-up appointments; and rate of referrals made to the right place, first time); improved clinical quality; and improved patient safety.</p> <p>K16. NHS England; the local NHS Trust; Directors; Divisional Managers are intrinsically involved in this process.</p>
Research & Limitations	<p>K12 Influencing and negotiating strategies both upwards and outwards.</p> <p>S3 Undertake research, and critically analyse and integrate complex information.</p> <p>S13 Use personal presence and “storytelling” to articulate and translate vision into</p>	<p>K12. There is resistance to virtual triage from clinicians, patients and others, requiring the use of high-level communication skills to encourage all parties to be involved in the research. Any limitations to the research (financial or access to patients) – including the impact of those limitations was recorded.</p> <p>S3. In addition to a literature review covering problem identification and potential solutions, research was carried out to identify critical success factors with external NHS hospitals and trusts (such as Guys and St Thomas’ Hospital) that had implemented virtual triage. This included the need to fully integrating triage with the e-Referral System – and making better utilisation of available technology.</p>

	<p>operational strategies, demonstrating clarity in thinking.</p> <p>S20 Lead within their area of control/authority, influencing both upwards and outwards, negotiating and using advocacy skills to build reputation and effective collaboration.</p>	<p>S13. Positive case studies identified in the research - such as a virtual triage fracture clinic – can be used to articulate the ‘virtual triage vision’ and show clarity.</p> <p>S20. Having robust research, case studies and a clear vision, enabled the author to build the reputation of ‘virtual triage’ and, thereby, achieve effective collaboration.</p>
Budgeting & Resources	<p>K8 Financial strategies, for example scenarios, modelling and identifying trends, application of economic theory to decision-making, and how to evaluate financial and non- financial information, such as the implications of sustainable approaches.</p> <p>K9 Financial governance and legal requirements, and procurement strategies.</p>	<p>K8. Many complex financial strategies have been implemented on a national and regional basis (for example ‘<i>Modelling an Alternative Future - Economic Evaluation of a Digital NHS in London</i>’ calculated that £73m could be saved in London over a 5-year period). This data was used to inform the local financial strategies – such as using scenarios and modelling regarding the opportunity to reduce physical estates due to virtual triage or, at least, slow the flow of new builds. It is anticipated that savings for the Trust will amount to £2 million in the first full year of implementation.</p> <p>K9. In addition to using NHS financial processes and procedures, the Trust’s Director of Finance is a key stakeholder in the design and implementation of ‘virtual triage’ and, therefore, involved in an advisory capacity at each stage of the process. Moreover, all documentation, plans and interventions will be ratified by the Finance Department to ensure they adhere to NHS procurement processes – and governance and legal requirements.</p>

<p>Analysis of Options</p>	<p>K5 Systems thinking, knowledge/data management, research methodologies and programme management.</p> <p>B3 Curious and innovative - exploring areas of ambiguity and complexity and finding creative solutions.</p>	<p>K5. In line with the Elective Care Development Collaborations methodology, a diverse stakeholder ‘whole-system team’ was formed (<i>including patients, community members and NHS personnel working on other elements of the ‘redesign of elective care services’ initiative</i>) to give the research the widest possible range of perspectives and ensure a systems-based approach.</p> <p>B3. A critical and innovative analysis of options was essential – including finding creative solutions to potential problems. Examples included:</p> <ul style="list-style-type: none"> • Exploring the full clinical pathway, in partnership with clinicians, to identify and develop a shared understanding of clinical criteria for the points of triage along the pathway • Identifying if there was workforce capacity (clinical and administrative) to undertake triaging • Identifying creative ways to reassure patients and manage their expectations • Identifying ways to effectively evaluate the impact of triage.
<p>Proposed Implementation</p> <p>Including:</p> <ul style="list-style-type: none"> • Resources • Department Strategy • Communications plan 	<p>K5 Systems thinking, knowledge/data management, research methodologies and programme management.</p> <p>K9 Financial governance and legal requirements, and procurement strategies.</p>	<p>K5. In line with systems thinking and programme management, implementation will require close collaboration with colleagues involved in ‘virtual triage’ and those working on other projects to reduce outpatients’ appointments (such as ‘standardising referral pathways’) – as well as ensuring that ‘business as usual’ continues in an effective and efficient way. Patients’ data and information must also be kept in accordance with legislation and NHS governance.</p> <p>K9. Using NHS financial processes and procedures – along with the involvement of the Financial Director as a key stakeholder, ensures that NHS financial governance</p>

<ul style="list-style-type: none"> Stakeholder plan Project Planning tools 	<p>K12 Influencing and negotiating strategies both upwards and outwards.</p> <p>K15 Brand and reputation management.</p> <p>S2 Set strategic direction and gain support for it from key stakeholders.</p> <p>S11 Uses financial data to allocate resources.</p> <p>S13 Use personal presence and “storytelling” to articulate and translate vision into operational strategies, demonstrating clarity in thinking such as consideration of sustainable approaches.</p> <p>S19 Manage relationships across multiple and diverse stakeholders.</p> <p>S20 Lead within their area of control/authority, influencing both upwards and outwards, negotiating</p>	<p>and legal requirements are complied with. Additionally, all documentation, plans and interventions will be ratified by the Finance Department.</p> <p>K12. The Stakeholder Matrix, and full implementation of the Communication and Collaboration Plan ensures that the interests of both the ‘outwards and upwards stakeholders’ are aligned with the NHS Long Term Plan.</p> <p>K15. The proposed national and local assessment matrices will measure brand and reputation management. It is anticipated that there will be improvement in the following areas:</p> <ul style="list-style-type: none"> Patient and staff experience (indicators include Friends and Family Test and number of complaints) Efficiency (indicators include ‘referral to treatment time’; waiting time for follow-up appointments; and rate of referrals made to the right place, first time) Clinical quality (indicators include Patient Reported Outcome Measures) Patient safety (ease and equity of access to care). <p>All of which will be evaluated against set KPIs.</p> <p>S2. The strategic direction will focus on the implementation of ‘virtual triage’ as part of an NHS Trust’s commitment to the ‘redesign of elective care services.’</p> <p>S11. The proposed implementation uses financial data from a variety of local, regional and national sources to ensure the effective and efficient use of resources – such as making full utilisation of the available NHS technology; and ensuring any staff training is needs-based.</p> <p>S13. ‘Storytelling’ to articulate the vision is based entirely in fact including positive case studies; the savings that have been made in other trusts; and the success of</p>
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	<p>and using advocacy skills to build reputation and effective collaboration.</p>	<p>virtual triage during the pandemic. Importantly, case studies that highlight issues/problems will also be used as part of NHS Improvement’s lessons learnt process.</p> <p>S19. Multiple and diverse stakeholders will be actively involved from the start to gain buy-in and support – including people who have experienced the service; patient organisations; GPs and primary care clinical and nursing staff; general surgeons; specialists; nurse specialists; smoking cessation teams; business information analysts; administrative support teams; physiotherapists; commissioners; appointment booking staff; and others.</p> <p>S20. By the implementation stage, it is anticipated that resistance to virtual triage from will be minimal – any that is identified will be appropriately managed through communication and reassurance, unless senior intervention proves necessary.</p>
<p>Senior Leader/Board agreement</p>	<p>K14 Working with board and other company leadership structures</p> <p>S2 Set strategic direction and gain support for it from key stakeholders.</p>	<p>K14. This is a national, regional and local initiative; therefore, it is imperative to work closely with NHS leadership structures to analyse options and ensure virtual triage is effectively and efficiently implemented.</p> <p>S2. The overarching strategic direction ‘to redesign elective care services’ was set by NHS England’s Long Term Plan, therefore there is senior leadership agreement. However, there will be high levels of clinical engagement and communication across system teams as change will be led from the front, with support and permission from above.</p> <p>Moreover, the strategic focus of this proposal relates to a specific element of the overarching strategic direction (to redesign elective care services) i.e., ‘virtual triage’, which necessitates support from key stakeholders – hence the use of the</p>

		aforementioned 'whole-system team'; Communication and Collaboration Plan; and Stakeholder Matrix.
Conclusion & Recommendations	S3 Undertake research, and critically analyse and integrate complex information.	<p>S3. The conclusion and recommendations fulfil this criterion by evidencing that new technologies could support alternatives to face-to-face consulting, which can improve financial efficiency as well as the clinical effectiveness of services – and the ways in which they can be implemented.</p> <p>Importantly, they also stress the complex and inter-related challenges that teams will face - including the complexity of remote video consultation and associated systems (including organisational, legal, regulatory and policy contexts). Consequently, the recommendations are for a balanced, phased and carefully monitored approach.</p>

7. Assessment information: 703 Professional Discussion, underpinned by a Portfolio of Evidence

Overview

This assessment method includes 2 components.

- Portfolio of Evidence
- Professional Discussion

Rationale

Number of questions	8
Grading	P/X/D To achieve a Pass , the apprentice must meet all of the pass descriptors. To achieve a Distinction , the apprentice must meet all of the pass descriptors and all of the distinction descriptors.
Type of assessment	Professional Discussion
Duration	1 hour
Permitted materials	Portfolio of evidence
Location	The professional discussion can take place in any of the following: <ul style="list-style-type: none">• employer's premises• a suitable venue selected by the EPAO (for example a training provider's premises)• via video conferencing

Assessment specification

Description	Coverage	Grade
Professional Discussion, underpinned by a Portfolio of Evidence	Knowledge: K1, K2, K4, K6, K7, K10, K11, K13, K17, K18, K19, K20	X/P/D

	Skills: S1, S4.1, S4.2, S5, S6, S7, S8, S9, S10, S12, S14, S15, S16, S17, S18, S21 Behaviours: B1, B2, B4, B5	
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Assessment instructions

Portfolio of Evidence

The apprentice will create a Portfolio of Evidence during the on-programme stage of their apprenticeship. **The Portfolio of Evidence must be submitted at Gateway.**

The Portfolio of Evidence is not directly assessed, so does not contribute to the grading decision. It will be reviewed by the IEPA to provide context for the discussion.

The IEPA will expect the apprentice to provide detailed and proactive responses during the Professional Discussion about their evidence in relation to the themes and KSBs. The themes are:

- Organisational Values
- Finance, Workforce, Planning & Procurement
- Driving Change & Risk Management
- Team Working & Development

The employer should ensure the apprentice has sufficient time and the necessary resources to produce the Portfolio of Evidence. The employer and apprentice should agree any elements which will be undertaken outside normal working hours.

The Portfolio of Evidence 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 apprentice's Portfolio of Evidence will typically comprise 18 discrete pieces of work that cover the thirty-two assigned KSBs. There may be a number of documents within a discrete

piece of work, often referred to as a bundle. One bundle might be, for example, an extract of a project plan, with relevant supporting information such as a witness statement. There must be at least one piece of evidence that demonstrates each of the KSBs. A piece of evidence should ideally cover multiple KSBs.

Where the KSBs are not naturally occurring, the employer should expose the apprentice to projects, meetings or activities to provide the opportunity to gain experience and generate evidence.

Types of evidence

Types of evidence could be:

- Work products, such as:
 - Performance reviews
 - Project plans and documentation
 - Reports
 - Minutes of meetings
 - Demonstrations
 - Presentations
 - Research projects
 - Video or audio extracts, such as presentations (these should be a maximum of 5 minutes in length). It is helpful if the IEPA can easily identify the key pertinent points within the recording:
 - 1.1. Where an outcome is being met - this could be identified in the City & Guilds evidence matrix e.g., can be found from 4 minutes within the recording
 - 1.2. Which individual is the apprentice - an introduction at the beginning of each recording identifying who's involved and the date of the recording. This could be further supported with an annotated or written summary
- 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
- Feedback from managers, supervisors, or peers (any employer or peer contributions should focus only direct observation of evidence (for example witness statements) rather than opinions)

The IEPA will not be familiar with the apprentice or the specifics of their work environment, so evidence must be clear and unambiguous – an initial profile page and supporting context statements are recommended to support evidence that doesn't stand alone.

Evidence should **not** include:

- Hyperlinks
- Reflective accounts
- Case studies/simulated evidence
- Self-assessment
- Multiple documents embedded into a word document

Selecting evidence

Evidence must have been generated whilst on the apprenticeship. All evidence must be of the apprentice's own work and, for any teamwork, must clarify and focus on their contribution.

The employer and provider will advise the apprentice in the completion of their Portfolio of Evidence, the selection of the **best** evidence, and ensuring that the Portfolio of Evidence covers the totality of the KSBs assigned to this EPA.

For apprentices operating at this level, it is reasonable to expect them to take a high level of ownership of their Portfolio of Evidence so the employer must make them aware of their responsibility. Evidence generated towards the end of the apprenticeship, as they become more independent in their work, is likely to provide the most holistic evidence – i.e., covering a number of KSBs at once.

In summary, there are two questions that an apprentice should consider when selecting work to form their Portfolio of Evidence:

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

Authenticity

The Portfolio of Evidence must be valid and attributable to the apprentice. When the Portfolio of Evidence is submitted, the apprentice and employer must confirm that it is the apprentice's own work by completing the Declaration of Authenticity.

Preparing evidence for submission

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

Evidence must be presented as follows:

- With a header or footer containing the apprentice's name, the date the evidence was produced, and an evidence reference number
- The content of the Portfolio of Evidence must be mapped to the assigned KSBs on the City & Guilds Evidence Matrix
- External sources are clearly referenced using a recognised system

A completed City & Guilds Evidence Matrix directs the IEPA to where in the Portfolio of Evidence they can find the apprentice's work against the KSBs, enabling the IEPA to review the content effectively as they prepare for the Professional Discussion.

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.

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

Confirming the evidence selection

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

- It contains evidence related to all the KSBs that will be assessed by the Professional Discussion
- The evidence is formatted and referenced as above
- It has been generated during the apprenticeship
- There is no unnecessary duplication of evidence against the same KSBs
- 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 are clear when evidence is from project or teamwork
- Relevant confidentiality and data protection requirements have been met
- Authenticity of evidence has been established

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:
 - 1.3. details of how the IEPA/LIEPA will access the e-portfolio
 - 1.4. 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 checklist has been created to help the apprentice ensure that all relevant information is provided:

Portfolio checklist	
1.	Is all evidence named, dated and given a reference number on the City & Guilds Evidence Matrix?
2.	Has the evidence been completed during the apprenticeship?

3.	Does evidence clearly show it is the apprentice's individual work (and if involved in teamwork 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 all the relevant KSBs?
8.	Are any witness testimonies or employer references tailored to the apprentice?
9.	Has any sensitive information been anonymised?
10.	Have all external sources of information been appropriately documented and referenced to the original source, showing clear understanding of how they relate to the criteria?
11.	No reflective accounts are included.

In summary, submission at Gateway must include:

- Portfolio of Evidence
- City & Guilds Portfolio Evidence Matrix
- Portfolio of Evidence Declaration of Authenticity

Professional Discussion

This component of the EPA can take place before or after the Strategic Business Proposal EPA.

The apprentice will have 4 weeks-notice of this EPA. This will usually take place remotely, using an online virtual meeting platform. The technical details can be found in the [ILM/City & Guilds Manual for End-point Assessment](#).

The Portfolio of Evidence will be reviewed by the IEPA in preparation for the Professional Discussion EPA. The IEPA will have a discussion with the apprentice to draw out evidence of the apprentice's competence and assess the [KSBs](#) assigned to this EPA. The apprentice may include information which is not part of the Portfolio of Evidence. The IEPA will use the grading descriptors to decide the grade for the Professional Discussion EPA.

The Professional Discussion **must** take 1 hour as directed by the Assessment Plan. The IEPA has discretion to allow the apprentice up to 6 minutes extra (10%) to finish their final point.

Preparing the apprentice

The employer should ensure that the apprentice is prepared for the Professional Discussion and **can articulate how their evidence meets the KSBs** under the four themes. The apprentice should be prepared to talk concisely about their evidence because the time for the Professional Discussion is limited.

The IEPA will ask a minimum of 8 open questions based on the KSBs assigned to the themes in this EPA:

- Organisational Values
- Finance, Workforce, Planning & Procurement
- Driving Change & Risk Management
- Team Working & Development

The apprentice will need to provide responses that confirm their competency against the KSBs mapped to this EPA. The Portfolio of Evidence is not assessed, so the apprentice will need to proactively cover all the KSB within the discussion.

The IEPA may ask follow-up questions where clarification is required. The questions will not be shared prior to the Professional Discussion. The IEPA will use the full time available to allow the apprentice the opportunity to evidence competence at the highest level available.

The employer will prepare the apprentice for the Professional Discussion by:

- Supporting the development of their discussion skills - **helping the apprentice prepare to cover all the KSBs within the discussion**
- Ensuring the apprentice is familiar with the grading descriptors assigned to this EPA
- Instructing them to bring photo ID. The assessment cannot proceed without the ID process being completed to the IEPA's satisfaction

What will happen during the EPA event

The employer will prepare the apprentice by making them aware that:

- The Professional Discussion will usually be conducted remotely
- The Professional Discussion **must** take 1 hour as directed by the Assessment Plan
- A discretionary additional 6 minutes (10%) can be added
- The IEPA will stop the Professional Discussion after 1 hour 6 minutes
- Apprentices must have a minimum of 4 weeks-notice of their Professional Discussion
- The Professional Discussion will be recorded by the IEPA **as soon as the virtual meeting starts** and kept for quality assurance purposes. ILM's Privacy policy applies

The apprentice should have their Portfolio of Evidence available during the Professional Discussion and refer to it to support their responses.

Venue & Equipment

The employer must provide a quiet room, free from distractions and interruptions for the Professional Discussion, ensuring that appropriate signposting and other arrangements are

in place that will maintain a suitable environment throughout the duration of the EPA. This could be at the apprentice's workplace or the provider's premises.

The employer should ensure that the location of an assessment is prepared, and that any necessary equipment and/or resources are at hand.

Before the Professional Discussion starts

The IEPA will:

- Check the identity of the apprentice by asking them to show photo ID. The assessment cannot proceed without the ID process being completed to the IEPA's satisfaction
- Introduce themselves and explain their role in the EPA
- Summarise the purpose and structure
- Confirm the order in which the apprentice wants to take the assessments
- Explain the timings of the EPA
- Emphasise that confidentiality will be maintained
- Ask the apprentice if they have any questions before beginning the assessment
- Tell the apprentice when the formal assessment begins

KSBs and grading descriptors

A mapping table detailing KSBs assessed using this method and grading descriptors can be found in Appendix 1/2

Grading

The Practical assessment will be graded Fail, Pass or Distinction. The IEPA is fully responsible for making the grading decision. The results will not be shared on the day of the assessment.



Resits and retakes

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

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

702 Strategic Business Proposal

If the apprentice fails the Strategic Business Proposal EPA, they can take part in a new Presentation and Questioning. The EPA will be completed in the same way as the first attempt, e.g., format and EPA event timing.

The apprentice must review and rework their evidence in line with the IEPA's feedback:

- The apprentice will have up to 3 weeks to submit the Strategic Business Proposal and presentation materials
- The IEPA will then have 2 weeks to review the evidence
- The apprentice will have 4 weeks-notice of the new Presentation and Questioning date

The apprentice's evidence must comply with the requirements from their first submission and clearly show any changes **where they have decided to make them**:

- Strategic Business Proposal e.g., 4,000 word limit, content that must be covered
- City & Guilds Strategic Business Proposal Evidence Matrix
- Strategic Business Proposal presentation materials
- Strategic Business Proposal Declaration of Authenticity

The apprentice will be assessed against **all** the assigned KSBs.

703 Professional Discussion

If the apprentice fails the Professional Discussion EPA, they can take part in a new Professional Discussion. The apprentice will have 4 weeks-notice of the Professional

Discussion event. The EPA will be completed in the same way as the first attempt, e.g., format and EPA event timing.

No re-submission is required. The apprentice may choose to re-submit their Portfolio of Evidence (with an updated City & Guilds Portfolio Evidence Matrix). The Portfolio of Evidence must comply with requirements as before e.g., typically 18 pieces of evidence.

The apprentice will be assessed against **all** the assigned KSBs, so **they should prepare to explain their evidence against all the assigned KSBs during the discussion.**

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Who we are

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

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

About City & Guilds

For almost 150 years we have been developing knowledge, skills, and behaviours needed to help businesses thrive, we offer a broad and imaginative range of products and services that help people achieve their potential through workbased learning. We believe in a world where people and organisations have the confidence and capabilities to prosper, today and in the future. So we work with like-minded partners to develop the skills that industries demand across the world.

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Appendix 1/1 - Themes and KSBs Strategic Business Proposal, Presentation with Questioning

Themes & KSBs	Fail	Pass The apprentice must meet all of the pass descriptors below	Distinction The apprentice must meet all of the pass descriptors and all of the distinction descriptors below
Research K3 K14 K16 S2 S19	Does not meet the pass descriptors.	<p>Creates a high-performance strategy, focussing on improving efficiency changing customer demands and trend analysis and which has support from a range of stakeholders. (K3, S2)</p> <p>Evaluates how the strategic business proposal takes full account of the leadership structures within the organisation and of key stakeholders and manages relationships across stakeholders. (K14, K16, S19)</p>	Critically evaluates the need for improving brand management and reputation, and explains how this would reduce risks to the organisation brand.
Methodologies & Analysis K5 K8 K9 S3 S11 B3	Does not meet the pass descriptors.	<p>Justifies how they selected and used an approach that is underpinned by research using a range of methodologies, critically analysing and synthesising the outcomes and producing creative solutions to areas of ambiguity or complexity. (K5, S3, B3)</p> <p>Applies economic theories and financial modelling to develop strategies and allocate resources in line with legal, governance and procurement requirements. (K8, K9, S11)</p>	Critically evaluates the financial strategies used and justifies recommendations made.
Communication	Does not meet the	Justifies how they use influencing and negotiating strategies to collaborate with stakeholders and build their organisation’s brand and reputation in	Persuasive and engaging in articulating strategies that maximise opportunities for sustainable growth based on synthesizing complex information

<p>K12 K15 S13 S20</p>	<p>pass descriptors.</p>	<p>developing the strategic business proposal. (K12, K15, S20)</p> <p>Delivers a strategic business proposal and presentation that demonstrates a clear vision for the organisation and translates this into operational strategies. (S13)</p>	<p>including changing customer demand and robust research, critically analysing and justifying proposed solutions and their alternatives.</p>
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Appendix 1/2 - Themes and KSBs Professional Discussion, underpinned by a Portfolio of Evidence

Themes & KSBs	Fail	Pass	Distinction
Organisational Values K2 K6 K13 K19 K20 S1 S7 S8 S10 S21	Does not meet the pass descriptors.	<p>The apprentice must meet all of the pass descriptors below</p> <p>Interprets ethics and value-based leadership theories and principles in order to challenge strategies, operations and financial assumptions and defines their responsibility for resource allocation and overseeing development and monitoring of financial strategies based on KPIs that maintain sustainability and business continuity/risk management. (K6, S7, S10)</p> <p>Summarises how the communications strategy links to their area of responsibility and justifies the approaches taken to shape and manage it, taking account of the external social and political environment and the diverse needs of internal and external stakeholders. (K13, K20, S21)</p> <p>Implements a high-performance strategy, focussing on growth and improving efficiency, synthesising outcomes from modelling and horizon scanning. (K2, S1)</p> <p>Applies the approaches and principles to developing a corporate social responsibility programme and justifies how they apply these principles to ensure the organisation’s compliance to governance and regulations. (K19, S8)</p>	<p>The apprentice must meet all of the pass descriptors and all of the distinction descriptors below</p> <p>Evaluates the effectiveness of the communications strategy for their area of responsibility, explaining how they have acted on analysis and feedback to make recommendations for continuous improvement to the organisation’s overall strategy.</p>

<p>Finance, Workforce, Planning & Procurement</p> <p>K11</p> <p>S9 S12 S14</p> <p>B4</p>	<p>Does not meet the pass descriptors.</p>	<p>Analyses their approach to workforce planning, evaluating its effectiveness in developing a diverse, inclusive, resilient and valued workforce that optimises their skills to the benefit of the organisation. (K11, S9, S14, B4)</p> <p>Justifies their approach to overseeing procurement, supply chain management and contracts. (S12)</p>	
<p>Driving Change & Risk Management</p> <p>K1 K4 K7 K17</p> <p>S4.1 S5 S6</p> <p>B1</p>	<p>Does not meet the pass descriptors.</p>	<p>Evaluates how they shape their organisation's mission, culture and values by championing projects as an ambassador that transform services across the organisation. (K1, S6)</p> <p>Justifies how they have worked collaboratively in driving change and implementing new ways of working to improve the sustainability of the organisation and how they have established a creative and innovative environment. (K4, S4.1, B1)</p> <p>Critically analyses approaches to decision making and the use of big data when developing competitive strategies to implement and manage change. (K7)</p> <p>Justifies the risk management techniques they have used to lead and respond to a crisis situation. (K17, S5)</p>	<p>Drives transformative change with tangible benefits for the organisation.</p> <p>Analyses and evaluates a crisis situation that they have managed explaining and justifying changes to policy and procedure that they recommended as a result of the experience.</p>

<p>Team Working & Development</p> <p>K10 K18</p> <p>S4.2 S15 S16 S17 S18</p> <p>B2 B5</p>	<p>Does not meet the pass descriptors.</p>	<p>Justifies how they use and encourage continued professional development opportunities for themselves and others, as well as coaching and mentoring techniques, to build engagement in their team and develop an agile and collaborative culture of high performance. (K10, K18, S18, B5)</p> <p>Evaluates how they have led and influenced people, building constructive and trustful teams confident to take risks when appropriate and able to respond to and provide constructive feedback and challenge. (S15, S17)</p> <p>Justifies how they have taken responsibility for driving continuous improvement through establishing an open and high-performing working environment with clear goals and accountabilities. (S4.2, S16, B2)</p>	<p>Evaluates where they have used coaching and mentoring techniques to improve the performance of an individual or a team with a positive impact for the organisation.</p>
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