

# City & Guilds Level 3 End-point Assessment for Team Leader (9308-33)

EPA Pack for Providers and Employers

Standard ST0384

EPA Plan Version ST0384 V1.4

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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 3 End-point Assessment for ST0384 Team Leader (9308-33) Apprenticeship Standard v1.4. It explains how apprentices will demonstrate the knowledge, skills, and behaviours (KSBs) which they developed during their apprenticeship.



This pack must be used alongside the:

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

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

- Using the EPA Pro Portal
- The process for booking EPA, including timescales
- Acceptable qualifications and certificates at Gateway
- Uploading files to the EPA Pro Portal
- Use of electronic signatures
- Responsibilities of providers and employers
- The Quality Assurance process

A full-time team leader apprentice typically spends 15 months on-programme. The apprentice must spend at least 12 months on programme and complete the required amount of off-the-job training as specified in the apprenticeship funding rules.

The employer should ensure that the apprentice has access to development opportunities to improve their knowledge, skills and behaviours, as outlined in the Standard, and hold regular 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:

- Presentation with questions
- 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

Some actions to help the apprentice prepare for EPA:

- Explain the assessments and **Recording Forms** to the apprentice – refer to details in the Assessment Instructions sections of this pack
- Agree on a realistic timeframe for submission of evidence that meets the EPA deadlines – any delays in the submission of evidence will delay the assessments
- Make sure the apprentice has the resources and time to prepare for and undertake EPA
- Take the apprentice through some mock assessments
- Share the EPA Preparation Guide with the apprentice. It includes information about system requirements for virtual meetings
- Let ILM/City & Guilds know if reasonable adjustments are required to support an apprentice through the EPA. The ILM/City & Guilds policy is on the ILM 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, e.g., 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. These are integrated into the Recording Forms document.

## Health & Safety and Codes of Practice

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

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

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

## Overall grade

Performance in the EPA determines the overall grade of:

- fail
- pass
- distinction

An IEPA must individually grade the presentation with questions and professional discussion underpinned by a portfolio of evidence in line with this EPA plan.

The EPAO must combine the individual assessment method grades to determine the overall EPA grade.

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

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

Assessment 1: Presentation with questions	Assessment 2: Professional discussion underpinned by a portfolio of evidence	Overall Grading
Fail	Fail	Fail
Pass	Fail	Fail
Fail	Pass	Fail
Pass	Pass	Pass
Distinction	Pass	Pass
Pass	Distinction	Pass
Distinction	Distinction	Distinction

If the apprentice fails one assessment method or more, they will be awarded an overall fail.

End-point assessments	Weighting
706 Presentation with questions and answers	50%
705 Professional Discussion underpinned by a portfolio of evidence	50%
Total	100%

## Results submission and feedback

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.

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.

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

## Professional recognition

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

## Statement of achievement

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

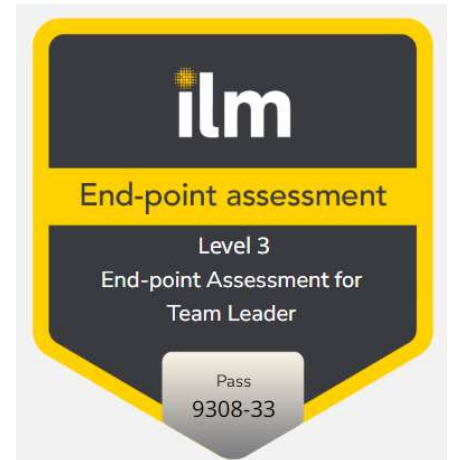
Providers and employers with access can view and download PDF copies of the Statement 24 hours after the results are published. A PDF supports more efficient processing of funding claims by providing evidence of learner certification before the apprentice's paper certificate arrives.

The overall Apprenticeship certificate will be issued by the Institute for Apprenticeships and Technical Education (IfATE).

## Digital credentials

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

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



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

## Security, confidentiality and copyright of End-point Assessment materials

The following Terms of Use apply to the use of any City & Guilds EPA Assessment Materials (“EPA Assessment Materials”), included with the EPA Pack or otherwise provided by City & Guilds to the Customer from time to time under City & Guilds’ EPA Service, by Customers. They form part of the Agreement between City & Guilds and the Customer for the provision of City & Guilds’ EPA Service in accordance with the Manual for the End-point Assessment Service (hereafter the Manual).

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- (where any EPA Assessment Materials are dated examinations), the City & Guilds invigilation instructions; and
- any conditions contained in a document itself.

Defined terms in these Terms of Use shall have the meaning given to them in the Manual.

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- **only** use any EPA Assessment Materials for the purpose of formal, summative EPA assessment in connection with the Agreement and not for any other purpose (including, but not restricted to, teaching, revision, as practice assessments or for commercial purposes);
- **not** make copies of any EPA Assessment Materials, whether in whole or in part, at any time;
- handle and store any EPA Assessment Materials securely at all times;
- ensure that:
  - any EPA Assessment Materials are made accessible to Apprentices only during formal EPA assessment as governed by the assessment conditions specified for the individual Apprenticeship Standard;
  - whilst the portfolio of an Apprentice may contain EPA assessment results referenced to the EPA assessment taken from time to time, they do not at any time contain the EPA Assessment Materials, unless otherwise stated in the individual Apprenticeship Standard; and
  - the content of any EPA Assessment Materials is not made public in any format, whether in part or in full, at any time;
- **under no circumstances** share any EPA Assessment Materials with any third-party organisation or individual;
- seek written permission from City & Guilds if they wish to convert any EPA Assessment Materials for storage, retrieval and delivery in electronic form (i.e., using some form of e-assessment or e-learning system) from time to time; and
- provide access, on request, to City & Guilds to any system(s) on which any EPA Assessment Materials appear, are stored or delivered from time to time.

## 2. The Apprenticeship Standard



### The occupational role

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

A team leader is found in organisations where there is a requirement for first-line management and a need to support teams and senior management.

The broad purpose of the occupation is a team leader role, with operational and project responsibilities. They will have responsibility for managing individuals, a team, or elements of a project. They provide direction, instructions, and guidance to ensure the achievement of set goals. Team leaders are vital for the smooth functioning of all departments in any organisation and are often responsible for ensuring the function is correctly administered and maintained in line with legislation of the organisation's procedures

### The occupational standard

This occupational 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 Knowledge, skills, and behaviours (KSBs) which a successful apprentice will be able to demonstrate:

Duty:	KSBs:
Duty 1 Sets, monitors, and manages objectives and performance which link to organisational outcomes.	K1 K2 K4 K9 K10 K11 K12 K13 K15 K16 K17 K19 K21 K23 S4 S5 S6 S7 S10 S11 S13 S14 S15 S16 S17 S18 B1 B2 B5
Duty 2 Manage resources to deliver tasks within budget and targets.	K1 K2 K7 K8 K14 K19 K22 S1 S2 S5 S14 S19 B3 B5
Duty 3 Contributes to the training and ongoing development needs of the individual or the team.	K1 K2 K3 K5 K6 K10 K16 K17 K18 K19 K23 S3 S4 S7 S9 S18 B2 B4
Duty 4 Collates and interprets data and shares outputs with stakeholders to support decision-making.	K9 K12 K14 K15 K20 K21 S2 S3 S5 S7 S8 S11 S12 S13 S14 S15 S16 B1 B2 B5

Duty:	KSBs:
Duty 5 Contributes to projects, initiatives, and their implementation to achieve organisational goals.	K1 K4 K6 K7 K8 K9 K11 K12 K13 K16 K17 K18 K19 K20 K22 S1 S2 S3 S5 S6 S7 S8 S10 S11 S13 S14 S15 S16 S18 B1 B2 B3 B5
Duty 6 Monitors and applies operational policies, relevant legislation, and regulation, and makes recommendations to ensure individual and team compliance.	K1 K3 K5 K9 K10 K20 S3 S12 S17
Duty 7 Identifies, assesses, and monitors potential risks, and supports the mitigation of risk within the organisation.	K4 K5 K7 K9 K10 K13 K15 K16 K21 K22 K23 S5 S6 S7 S8 S10 S12 S17 S18
Duty 8 Contributes to change and support others through change.	K1 K2 K4 K9 K10 K11 K12 K13 K15 K16 K17 K19 K21 K23 S4 S5 S6 S7 S10 S11 S13 S14 S15 S16 S17 S18 B1 B2 B5
Duty 9 Support the development and implementation of sustainable operational plans to achieve organisation goals.	K1 K3 K6 K7 K11 K13 K15 K21 S1 S11 S13 S14 S16 S18 B2
Duty 10 Lead and manage the team to ensure the application of equity, diversity, and inclusion principles.	K1 K5 K10 K17 S4 S9 S12 S17 B1 B2 B3
Duty 11 Collaborates and builds relationships with stakeholders to identify and support improvement opportunities.	K4 K9 K11 K12 K13 K15 K16 K19 K23 S5 S6 S7 S8 S10 S12 S13 S14 S15 S16 S18 B1 B2
Duty 12 Communicates information to drive operational activities and improve organisational performance.	K9 K11 K12 K13 K14 K20 S3 S5 S8 S11 S12 S13 S16 B1 B2 B3 B5
Duty 13 Manage the team and resources to reduce carbon footprint and reduce business costs.	K1 K2 K3 K5 K6 K7 K12 K13 K15 K16 K17 K21 K22 S1 S5 S7 S10 S11 S12 S18 S19 B1 B2

## Knowledge, Skills and Behaviours

KSB Ref.	Knowledge	Assessment Method
K1	Performance management techniques.	Professional discussion underpinned by a portfolio of evidence
K2	How to identify the learning needs of others and solutions to address them.	Professional discussion underpinned by a portfolio of evidence
K3	Processes and policies which support the delivery of operational requirements.	Presentation with questions
K4	Project management tools and techniques.	Professional discussion underpinned by a portfolio of evidence
K5	Relevant regulation, legislation, and compliance that impacts their role and the organisation.	Presentation with questions
K6	Organisational strategy and objectives and how their role impacts on them.	Presentation with questions
K7	How to manage resources to implement operational and team plans.	Professional discussion underpinned by a portfolio of evidence
K8	Time management and prioritisation tools.	Professional discussion underpinned by a portfolio of evidence
K9	Communication techniques including presentation skills, negotiation and influencing skills.	Presentation with questions
K10	Policy and procedure relating to people and organisational culture.	Professional discussion underpinned by a portfolio of evidence
K11	Stakeholder management.	Presentation with questions
K12	Problem-solving and decision-making principles.	Presentation with questions

K13	Principles of change management and continuous improvement.	Professional discussion underpinned by a portfolio of evidence
K14	IT and software used to support the activities of the business.	Professional discussion underpinned by a portfolio of evidence
K15	External factors that affect the workplace, such as sustainability and net carbon zero, and how they are managed.	Presentation with questions
K16	The impact that internal and external factors such as environmental impacts, have on their role.	Presentation with questions
K17	Leadership and management approaches.	Professional discussion underpinned by a portfolio of evidence
K18	The purpose of their role within the organisation, including their level of responsibility and accountability.	Professional discussion underpinned by a portfolio of evidence
K19	The impact that cross-team working has in the delivery of organisational objectives.	Presentation with questions
K20	How to collate, interpret and communicate data and information to meet the needs of different audiences.	Presentation with questions
K21	The wider social and economic environment in which the organisation operates.	Presentation with questions
K22	Approaches to managing budgets, and options and choices to maximise efficient use of resources.	Professional discussion underpinned by a portfolio of evidence
K23	Principles of equity, diversity and inclusion in the workplace and their impact on the organisation and the team.	Professional discussion underpinned by a portfolio of evidence

Ref.	Skills	Assessment Method
S1	Use resources to implement operational and team plans.	Professional discussion underpinned by a portfolio of evidence
S2	Use tools to organise, prioritise and allocate daily and weekly work activities.	Professional discussion underpinned by a portfolio of evidence
S3	Able to collate and interpret data and information and create reports.	Presentation with questions
S4	Identify and support the development of the team through informal coaching and continuous professional development.	Professional discussion underpinned by a portfolio of evidence
S5	Use information and problem-solving techniques to provide solutions and influence the decision-making process.	Presentation with questions
S6	Use digital tools for planning and project management to monitor project progress, taking corrective action to deliver against the project plan.	Professional discussion underpinned by a portfolio of evidence
S7	Review work processes to identify opportunities to improve performance and for continuous improvement.	Professional discussion underpinned by a portfolio of evidence
S8	Use technology and software to produce documentation, such as spreadsheets and presentation packages to communicate information.	Professional discussion underpinned by a portfolio of evidence
S9	Manage individual or team performance by setting objectives, monitoring progress, and providing clear guidance and feedback.	Presentation with questions

S10	Manage others through change by identifying challenges and the activities to resolve them.	Professional discussion underpinned by a portfolio of evidence
S11	Interpret organisational strategy and communicate how this impacts others.	Professional discussion underpinned by a portfolio of evidence
S12	Interpret and apply regulation and legislation, share best practices, and advise stakeholders on their application.	Professional discussion underpinned by a portfolio of evidence
S13	Communicate information through different media, such as face-to-face meetings, emails, reports, and presentations to enable key stakeholders to understand what is required.	Professional discussion underpinned by a portfolio of evidence
S14	Collaborate with stakeholders in the organisation to ensure the delivery of operational goals.	Professional discussion underpinned by a portfolio of evidence
S15	Manage and maintain relationships with a diverse workforce and stakeholders.	Presentation with questions
S16	Negotiate with and challenge stakeholders to manage change and reduce conflict.	Professional discussion underpinned by a portfolio of evidence
S17	Interpret policy and support the delivery of equity, diversity and inclusion in the workplace and monitor their impact on their team.	Presentation with questions
S18	Identify future changes in the sector such as technology advances that may impact their organisation.	Presentation with questions

S19	Monitor the use of technology and the potential to reduce energy consumption through their optimisation in day-to-day tasks, such as reducing the use of paper and switching off items when not in use.	Professional discussion underpinned by a portfolio of evidence
<b>Ref.</b>	<b>Behaviours</b>	<b>Assessment Method</b>
B1	Acts professionally, ethically and with integrity.	Professional discussion underpinned by a portfolio of evidence
B2	Supports an inclusive culture, treating colleagues and external stakeholders fairly and with respect.	Presentation with questions
B3	Takes accountability and ownership of their tasks and workload.	Professional discussion underpinned by a portfolio of evidence
B4	Seeks learning opportunities and continuous professional development.	Professional discussion underpinned by a portfolio of evidence
B5	Works flexibly and adapts to circumstances.	Presentation with questions

## 9308-706 Presentation with questions: themes, KSBs and grading descriptors

Theme: Data collection and benchmarking			
Ref.	KSB	Pass	Distinction
K3	Processes and policies which support the delivery of operational requirements.	Outlines the processes and policies supporting the delivery (of the chosen topic) and the regulation, legislation and compliance which impacts their role and the organisation. (K3, K5)	None
K5	Relevant regulation, legislation, and compliance that impacts their role and the organisation.		
K15	External factors that affect the workplace, such as sustainability and net carbon zero, and how they are managed.	Explains how (the chosen topic) considers external factors affecting the workplace, how they are managed, and the influence of the wider social and economic environment in which the organisation operates. (K15, K21)	Evaluates the impact of external factors and the influence of the wider social and economic environment in which the organisation operates (on the chosen topic). (K15, K21)
K21	The wider social and economic environment in which the organisation operates.		
K20	How to collate, interpret and communicate data and information to meet the needs of different audiences.	Collates and interprets data and information to create reports tailored to the needs of different audiences. (K20, S3)	Evaluates how well the reports they created met the needs of different audiences. (K20, S3)

S3	Able to collate and interpret data and information and create reports.		
<b>Theme: Problem analysis and conclusions</b>			
Ref.	KSB	Pass	Distinction
K6	Organisational strategy and objectives and how their role impacts on them.	Explains how their role impacts on the organisation's strategy and objectives and the impact that cross team working has on delivering them. (K6, K19)	None
K19	The impact that cross-team working has in the delivery of organisational objectives.		
K9	Communication techniques including presentation skills, negotiation and influencing skills.	Applies communication techniques, problem-solving and decision-making principles to provide solutions and influence the decision-making process. (K9, K12, S5)	Justifies their selection of communication techniques, problem-solving and decision-making principles to provide solutions and influence the decision-making process. (K9, K12, S5)
K12	Problem-solving and decision-making principles.		
S5	Use information and problem-solving techniques to provide solutions and influence the decision-making process.		

Theme: People and relationships			
Ref	KSB	Pass	Distinction
K11	Stakeholder management.	Explains how they manage and maintain relationships with a diverse workforce and stakeholders, set objectives, monitor progress, and provide guidance and feedback for individual and team performances. (K11, S9, S15)	None
S9	Manage individual or team performance by setting objectives, monitoring progress, and providing clear guidance and feedback.		
S15	Manage and maintain relationships with a diverse workforce and stakeholders.		
S17	Interpret policy and support the delivery of equity, diversity and inclusion in the workplace and monitor their impact on their team.	Explains how they proactively support the delivery of equity, diversity and inclusion in the workplace and monitor the impact on their team. (S17, B2)	Evaluates the impact in the workplace of promoting an inclusive culture. (S17, B2)
Theme: Future plans and opportunities			
Ref.	KSB	Pass	Distinction
K16	The impact that internal and external factors such as environmental impacts, have on their role.	Describes the impact of internal and external factors on their role, identifying how they will work flexibly	None

S18	Identify future changes in the sector such as technology advances that may impact their organisation.	to adapt to future changes in the sector that may affect their organisation. (K16, S18, B5)	
B5	Works flexibly and adapts to circumstances.		

## 9308-705 Professional discussion: themes, KSBs and grading descriptors

Theme: Building a high performing team			
Ref.	KSB	Pass	Distinction
K2	How to identify the learning needs of others and solutions to address them.	Describes their approach to identifying and supporting the learning and development needs of team members, as well as seeking out opportunities to develop their own learning and professional development. (K2, S4, B4)	None
S4	Identify and support the development of the team through informal coaching and continuous professional development.		
B4	Seeks learning opportunities and continuous professional development.		
K1	Performance management techniques.	Describes the leadership, management and performance management techniques and tools they use to organise, prioritise, and allocate work activities. (K1, K17, S2)	
K17	Leadership and management approaches.		
S2	Use tools to organise, prioritise and allocate daily and weekly work activities.		

S12	Interpret and apply regulation and legislation, share best practices, and advise stakeholders on their application.	Explains their approach to sharing best practice and advising stakeholders on the practical application of regulation and legislation relevant to their work within the organisation. (S12)	
K10	Policy and procedure relating to people and organisational culture.	Explains how they have ethically and inclusively applied policies and procedures relating to people and organisational culture to support equity, diversity, and inclusion in the workplace. (K10, K23, B1)	Evaluates their approach to supporting and promoting equity, diversity, and inclusion in terms of impact on the workplace. (K10, K23, B1)
K23	Principles of equity, diversity and inclusion in the workplace and their impact on the organisation and the team		
B1	Acts professionally, ethically and with integrity.		
<b>Theme: Communication and implementing operational plans</b>			
<b>Ref.</b>	<b>KSB</b>	<b>Pass</b>	<b>Distinction</b>
K7	How to manage resources to implement operational and team plans.	Explains how they use and manage resources and collaborate with stakeholders to implement and deliver operational goals and team plans within their level of responsibility and accountability. (K7, K18, S1, S14)	None
K18	The purpose of their role within the organisation, including their level of responsibility and accountability.		

S1	Use resources to implement operational and team plans.		
S14	Communicate information through different media, such as face-to-face meetings, emails, reports, and presentations to enable key stakeholders to understand what is required.		
S11	Interpret organisational strategy and communicate how this impacts others.	Explains how they communicated the impact of organisational strategy on different stakeholders using different types of media to ensure understanding. (S11, S13)	Evaluates the impact of the techniques they have used to communicate how organisational strategy impacts stakeholders, suggesting improvements to facilitate their understanding of what is required. (S11, S13)
S13	Communicate information through different media, such as face-to-face meetings, emails, reports, and presentations to enable key stakeholders to understand what is required.		

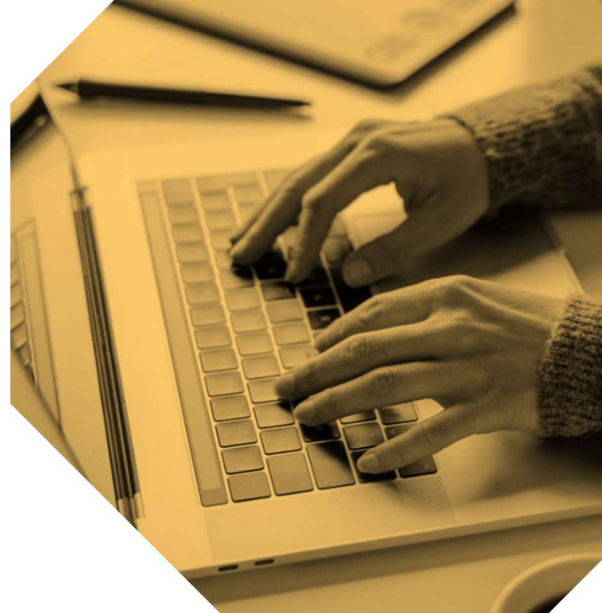
Theme: Managing change and continuous improvement			
Ref.	KSB	Pass	Distinction
K13	Principles of change management and continuous improvement.	Explains how they apply the principles of change management and continuous improvement to work processes to identify areas where performance can be enhanced (K13, S7)	Evaluates the extent to which continuous improvement techniques improve work processes. (K13, S7)
S7	Review work processes to identify opportunities to improve performance and for continuous improvement.		
S10	Manage others through change by identifying challenges and the activities to resolve them.	Describes how they negotiate with and challenge stakeholders and others, when managing change, and the activities used to resolve and reduce conflict. (S10, S16)	None
S16	Negotiate with and challenge stakeholders to manage change and reduce conflict.		
K22	Approaches to managing budgets, and options and choices to maximise efficient use of resources.	Describes their approach to managing budgets and maximising the use of resources. (K22)	None

Theme: Using technology			
Ref.	KSB	Pass	Distinction
K14	IT and software used to support the activities of the business.	Describes the technology, software, and methods they use to produce documentation and support activities for the business, and how they monitor their use to reduce energy consumption when not in use. (K14, S8, S19)	None
S8	Use technology and software to produce documentation, such as spreadsheets and presentation packages to communicate information.		
S19	Monitor the use of technology and the potential to reduce energy consumption through their optimisation in day-to-day tasks, such as reducing the use of paper and switching off items when not in use.		
Theme: Contributing to a project			
Ref.	KSB	Pass	Distinction
K4	Project management tools and techniques.	Explains how they utilise project management tools and techniques to plan a project, prioritise activities, monitor progress, and take corrective action to deliver against the project	None
K8	Time management and prioritisation tools.		

S6	Use digital tools for planning and project management to monitor project progress, taking corrective action to deliver against the project plan.	plan on time whilst taking ownership of the tasks. (K4, K8, S6, B3)	
B3	Takes accountability and ownership of their tasks and workload.		

### 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:

- complete training to develop the knowledge, skills and behaviours (KSBs) outlined in this apprenticeship's standard
- complete training towards English and mathematics qualifications in line with the apprenticeship funding rules
- compile a portfolio of evidence

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:

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

## 4. Timetable for End-point Assessment

The EPA period is typically completed within 3 months of the EPA Gateway, starting when ILM/City & Guilds has confirmed that all Gateway requirements have been met.

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

Planning meetings are optional for this Standard. The EPA Partnership Managers can provide additional guidance.



On-going during on-programme	Evidence & Forms
<p><b>Provider and Employer</b></p> <ul style="list-style-type: none"> <li>• Reviews progress as part of their regular performance management process and ensures apprentice's performance is on track</li> <li>• Identifies any gaps and creates a plan with the apprentice</li> <li>• Enrols apprentice on EPA Pro and provides 'Expected Date Ready for EPA' and (optional) 'Planning Meeting'</li> </ul>	<p>n/a</p>
<p><b>Apprentices</b></p> <ul style="list-style-type: none"> <li>• Complete training to develop the knowledge, skills and behaviours (KSBs) outlined in this apprenticeship's standard</li> <li>• Complete training towards, or provide evidence of English and mathematics qualifications in line with the apprenticeship funding rules</li> <li>• Compile a portfolio of evidence</li> </ul>	<p>Start to collate:</p> <ul style="list-style-type: none"> <li>• Portfolio of Evidence</li> <li>• English and Mathematics certifications</li> </ul>

Gateway Process	Evidence & Forms
<p><b>Employer</b></p> <ul style="list-style-type: none"> <li>• Reviews progress and ensures the apprentice is ready for the EPA</li> <li>• Reviews evidence to confirm that it is appropriate and sufficient to meet the standard</li> <li>• Attends the optional EPA Planning Meeting</li> </ul>	<ul style="list-style-type: none"> <li>• Declaration of Authenticity</li> </ul>
<p><b>Apprentice</b></p> <ul style="list-style-type: none"> <li>• Attends the optional EPA Planning Meeting</li> <li>• Must have been on programme for a minimum of 12 months</li> <li>• Completes and submits evidence and forms</li> </ul>	<p>Submits to Provider:</p> <ul style="list-style-type: none"> <li>• Apprentice Gateway Declaration</li> <li>• Portfolio of evidence</li> </ul>
<p><b>Provider – on EPA Pro</b></p> <ul style="list-style-type: none"> <li>• Books EPA on the EPA Pro portal, in line with ILM booking timelines in the EPA Manual</li> <li>• Makes ILM aware of any additional needs of the apprentice so that they can review reasonable adjustments – see the current policy on the City &amp; Guilds website, under <a href="#">EPA Documents Library</a></li> <li>• Completes Provider Gateway Declaration <b>on behalf of the employer and tutor</b></li> <li>• Attends the optional EPA Planning Meeting</li> <li>• Uploads evidence and forms onto EPA Pro</li> </ul>	<p>Completes on EPA Pro:</p> <ul style="list-style-type: none"> <li>• Provider Gateway Declaration</li> <li>• Preferred Planning Meeting Date form (on behalf of the employer)</li> </ul> <p>Signs:</p> <p>Declaration of Authenticity</p> <p>Uploads onto EPA Pro:</p> <ul style="list-style-type: none"> <li>• Apprentice Gateway Declaration</li> <li>• Portfolio of evidence</li> <li>• EPA Recording Form</li> </ul>
<p><b>City &amp; Guilds EPA Gateway Team</b></p> <ul style="list-style-type: none"> <li>• Formally confirms when all the Gateway requirements have been met</li> <li>• Amend/re-arrange EPA events as required and agreed with EPA Gateway Team and EPA Team</li> </ul>	<p>n/a</p>
<p><b>City &amp; Guilds EPA Team</b></p> <ul style="list-style-type: none"> <li>• Agrees with the Provider and IEPA a mutually</li> </ul>	<p>n/a</p>

Gateway Process	Evidence & Forms
<p>convenient date for the optional EPA Planning Meeting</p> <ul style="list-style-type: none"> <li>Agrees with the Provider and IEPA a mutually convenient date for the EPA Events</li> </ul>	
<p><b>IEPA</b></p> <ul style="list-style-type: none"> <li>Attends the optional EPA Planning Meeting</li> </ul>	n/a

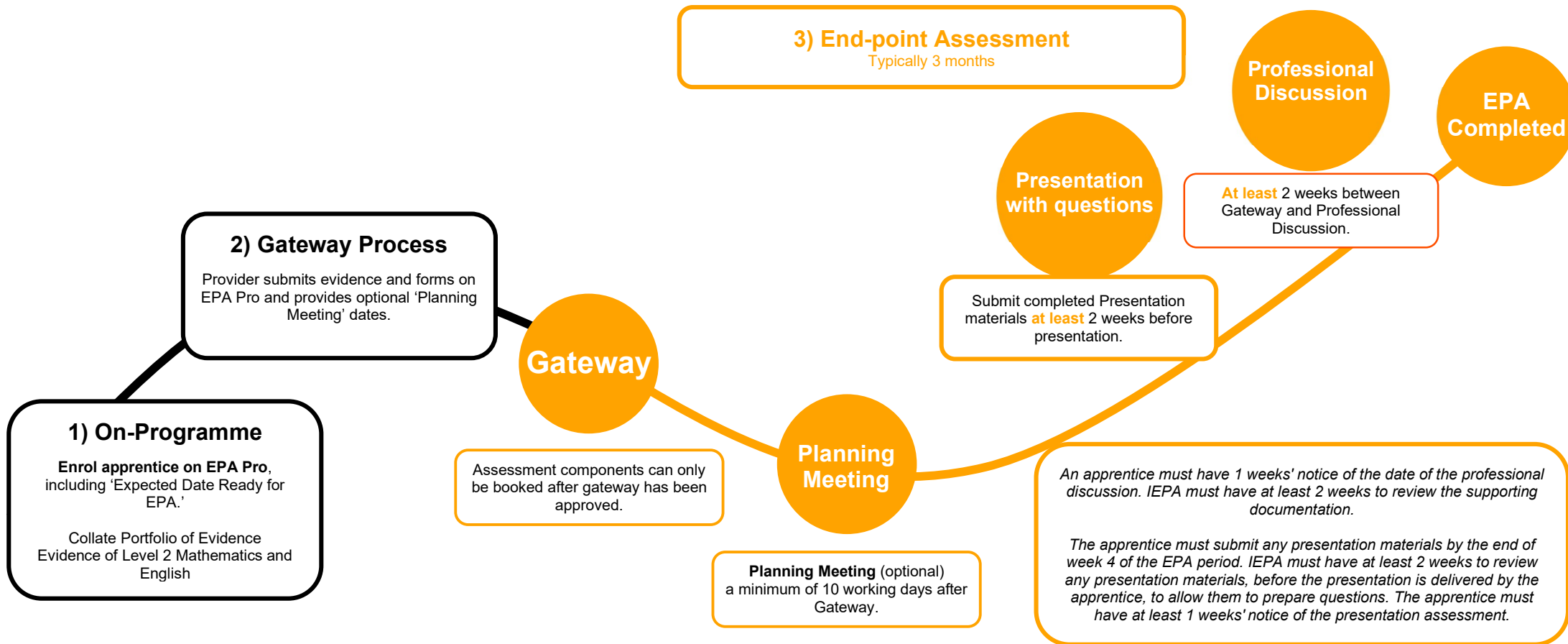
End-point Assessment	Evidence & Forms
<p><b>Apprentice</b></p> <ul style="list-style-type: none"> <li>Submits evidence post Gateway</li> <li>Completes End-point Assessments</li> </ul>	<p>Submits to Provider:</p> <ul style="list-style-type: none"> <li>Presentation</li> <li>EPA Recording Form</li> </ul>
<p><b>Employer</b></p> <ul style="list-style-type: none"> <li>Ensures the apprentice has access to the resources required for the assessments (see the <a href="#">Resources</a> section)</li> </ul>	<p>Submits to Provider:</p> <ul style="list-style-type: none"> <li>Declaration of Authenticity</li> </ul>
<p><b>Provider</b></p> <ul style="list-style-type: none"> <li>Submits evidence and forms</li> </ul>	<p>Uploads onto EPA Pro:</p> <ul style="list-style-type: none"> <li>Presentation</li> <li>EPA Recording Form incorporating the Declaration of Authenticity</li> </ul>
<p><b>IEPA</b></p> <ul style="list-style-type: none"> <li>Reviews the Portfolio of evidence and issues the Presentation title prior to the EPA events</li> <li>Reviews the Presentation prior to the EPA</li> <li>Carries out End-point Assessments</li> <li>Grades each assessment, communicates the results to the LIEPA</li> <li>Provides feedback for assessments in EPA Pro</li> </ul>	<p>Completes:</p> <ul style="list-style-type: none"> <li>Feedback Form</li> </ul>
<p><b>LIEPA</b></p>	<p>Reviews:</p>

End-point Assessment	Evidence & Forms
<ul style="list-style-type: none"> <li>• Samples and quality assures assessments according to the LIEPA sampling strategy</li> <li>• Confirms overall grade to EPA Team</li> </ul>	<ul style="list-style-type: none"> <li>• Presentation with questions recording form</li> <li>• Professional Discussion recording form</li> <li>• End Point Assessment Feedback form</li> <li>• Publishes the grade in EPA Pro</li> </ul>
<p><b>City &amp; Guilds EPA Team</b></p> <ul style="list-style-type: none"> <li>• Communicates the results to the Provider via EPA Pro</li> <li>• 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.</li> </ul>	<p>n/a</p>

## Summary timescales

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

Further information on EPA Service Timelines can be found on [www.cityandguilds.com](http://www.cityandguilds.com)



## 5. End-Point Assessment resources



Assessment Method	Resources Required
Presentation with questions	<ul style="list-style-type: none"> <li>• Access to a computer with video-conferencing software which is tested prior to the assessment starting. The video-conferencing software will be advised at point of booking.</li> <li>• Quiet room, free from distractions and interruptions</li> </ul>
Professional discussion underpinned by a portfolio of evidence	<ul style="list-style-type: none"> <li>• Access to a computer with video-conferencing software which is tested prior to the assessment starting. The video-conferencing software will be advised at point of booking.</li> <li>• Quiet room, free from distractions and interruptions</li> </ul>

## 6. Assessment instructions: 9308-705 Professional discussion underpinned by a portfolio of evidence

### Knowledge, Skills and Behaviours

KSB Coverage	Grade
<p><b>Knowledge:</b></p> <p>K1 Performance management techniques.</p> <p>K2 How to identify the learning needs of others and solutions to address them.</p> <p>K4 Project management tools and techniques.</p> <p>K7 How to manage resources to implement operational and team plans.</p> <p>K8 Time management and prioritisation tools.</p> <p>K10 Policy and procedure relating to people and organisational culture.</p> <p>K13 Principles of change management and continuous improvement.</p> <p>K14 IT and software used to support the activities of the business.</p> <p>K17 Leadership and management approaches.</p> <p>K18 The purpose of their role within the organisation, including their level of responsibility and accountability.</p> <p>K22 Approaches to managing budgets, and options and choices to maximise efficient use of resources.</p> <p>K23 Principles of equity, diversity and inclusion in the workplace and their impact on the organisation and the team.</p> <p><b>Skills:</b></p> <p>S1 Use resources to implement operational and team plans.</p> <p>S2 Use tools to organise, prioritise and allocate daily and weekly work activities.</p> <p>S3 Able to collate and interpret data and information and create reports.</p> <p>S4 Identify and support the development of the team through informal coaching and continuous professional development.</p> <p>S5 Use information and problem-solving techniques to provide solutions and influence the decision-making process.</p> <p>S6 Use digital tools for planning and project management to monitor project progress, taking corrective action to deliver against the project plan.</p>	<p>Fail / Pass / Distinction</p>

KSB Coverage	Grade
<p>S7 Review work processes to identify opportunities to improve performance and for continuous improvement.</p> <p>S8 Use technology and software to produce documentation, such as spreadsheets and presentation packages to communicate information.</p> <p>S10 Manage others through change by identifying challenges and the activities to resolve them.</p> <p>S11 Interpret organisational strategy and communicate how this impacts others.</p> <p>S12 Interpret and apply regulation and legislation, share best practices, and advise stakeholders on their application.</p> <p>S13 Communicate information through different media, such as face-to-face meetings, emails, reports, and presentations to enable key stakeholders to understand what is required.</p> <p>S14 Collaborate with stakeholders in the organisation to ensure the delivery of operational goals.</p> <p>S16 Negotiate with and challenge stakeholders to manage change and reduce conflict.</p> <p>S19 Monitor the use of technology and the potential to reduce energy consumption through their optimisation in day-to-day tasks, such as reducing the use of paper and switching off items when not in use.</p> <p><b>Behaviours:</b></p> <p>B1 Acts professionally, ethically and with integrity.</p> <p>B3 Takes accountability and ownership of their tasks and workload.</p> <p>B4 Seeks learning opportunities and continuous professional development.</p>	

## Assessment specification



### Overview

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

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

### Portfolio of evidence

The apprentice **must** compile a portfolio of evidence during the on-programme period of the apprenticeship. It should only contain evidence related to the KSBs that will be assessed by the professional discussion. It will typically contain **16 discrete pieces of evidence**. Evidence must be mapped against the KSBs using the Employer and Provider Recording Form. Evidence may be used to demonstrate more than one KSB; a **qualitative** as opposed to quantitative approach is suggested.

Evidence sources may include:

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

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

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

Any employer contributions should focus on direct observation of performance, for example, witness statements, rather than opinions. The evidence provided should be valid and attributable to the apprentice; the portfolio of evidence should contain a statement from the employer and apprentice confirming this, this statement is included in the Employer and Provider Recording form.

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

## Recommended approach for portfolio submission

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

- be an individual document, such as a Word file, or
- be organised into a folder where multiple documents are combined to support a specific piece of product evidence (e.g., a spreadsheet with a Word document providing context).
- it is advised that each folder contains no more than two documents.

## Delivery

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

An IEPA must conduct and assess the professional discussion.

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

- Building a high performing team
- Communicating and implementing operational plans
- Managing change and continuous improvement
- Using technology
- Contributing to a project

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

The IEPA must have at least two weeks to review the supporting documentation.

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

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

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

The IEPA **must ask at least five questions**.

The IEPA must make the grading decision.

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

## Assessment Location

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

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

## Grading

This assessment method is graded:

- fail
- pass
- distinction

Fail, the apprentice does not meet the pass criteria. To achieve a pass the apprentice must demonstrate all of the pass descriptors. To achieve a distinction the apprentice must demonstrate all of the pass descriptors and all of the distinction descriptors.

## 9308-705 Professional discussion: themes, KSBs and grading descriptors

Theme: Building a high performing team			
Ref.	KSB	Pass	Distinction
K2	How to identify the learning needs of others and solutions to address them.	Describes their approach to identifying and supporting the learning and development needs of team members, as well as seeking out opportunities to develop their own learning and professional development. (K2, S4, B4)	None
S4	Identify and support the development of the team through informal coaching and continuous professional development.		
B4	Seeks learning opportunities and continuous professional development.		
K1	Performance management techniques.	Describes the leadership, management and performance management techniques and tools they use to organise, prioritise, and allocate work activities. (K1, K17, S2)	
K17	Leadership and management approaches.		
S2	Use tools to organise, prioritise and allocate daily and weekly work activities.		

S12	Interpret and apply regulation and legislation, share best practices, and advise stakeholders on their application.	Explains their approach to sharing best practice and advising stakeholders on the practical application of regulation and legislation relevant to their work within the organisation. (S12)	
K10	Policy and procedure relating to people and organisational culture.	Explains how they have ethically and inclusively applied policies and procedures relating to people and organisational culture to support equity, diversity, and inclusion in the workplace. (K10, K23, B1)	Evaluates their approach to supporting and promoting equity, diversity, and inclusion in terms of impact on the workplace. (K10, K23, B1)
K23	Principles of equity, diversity and inclusion in the workplace and their impact on the organisation and the team		
B1	Acts professionally, ethically and with integrity.		

**Theme: Communication and implementing operational plans**

Ref.	KSB	Pass	Distinction
K7	How to manage resources to implement operational and team plans.	Explains how they use and manage resources and collaborate with stakeholders to implement and deliver operational goals and team plans within their level of responsibility and accountability. (K7, K18, S1, S14)	None
K18	The purpose of their role within the organisation, including their level of responsibility and accountability.		

S1	Use resources to implement operational and team plans.		
S14	Communicate information through different media, such as face-to-face meetings, emails, reports, and presentations to enable key stakeholders to understand what is required.		
S11	Interpret organisational strategy and communicate how this impacts others.	Explains how they communicated the impact of organisational strategy on different stakeholders using different types of media to ensure understanding. (S11, S13)	Evaluates the impact of the techniques they have used to communicate how organisational strategy impacts stakeholders, suggesting improvements to facilitate their understanding of what is required. (S11, S13)
S13	Communicate information through different media, such as face-to-face meetings, emails, reports, and presentations to enable key stakeholders to understand what is required.		

Theme: Managing change and continuous improvement			
Ref.	KSB	Pass	Distinction
K13	Principles of change management and continuous improvement.	Explains how they apply the principles of change management and continuous improvement to work processes to identify areas where performance can be enhanced (K13, S7)	Evaluates the extent to which continuous improvement techniques improve work processes. (K13, S7)
S7	Review work processes to identify opportunities to improve performance and for continuous improvement.		
S10	Manage others through change by identifying challenges and the activities to resolve them.	Describes how they negotiate with and challenge stakeholders and others, when managing change, and the activities used to resolve and reduce conflict. (S10, S16)	None
S16	Negotiate with and challenge stakeholders to manage change and reduce conflict.		
K22	Approaches to managing budgets, and options and choices to maximise efficient use of resources.	Describes their approach to managing budgets and maximising the use of resources. (K22)	None

Theme: Using technology			
Ref.	KSB	Pass	Distinction
K14	IT and software used to support the activities of the business.	Describes the technology, software, and methods they use to produce documentation and support activities for the business, and how they monitor their use to reduce energy consumption when not in use. (K14, S8, S19	None
S8	Use technology and software to produce documentation, such as spreadsheets and presentation packages to communicate information.		
S19	Monitor the use of technology and the potential to reduce energy consumption through their optimisation in day-to-day tasks, such as reducing the use of paper and switching off items when not in use.		

Theme: Contributing to a project			
Ref.	KSB	Pass	Distinction
K4	Project management tools and techniques.	Explains how they utilise project management tools and techniques to plan a project, prioritise activities, monitor progress, and take corrective action to deliver against the project plan on time whilst taking ownership of the tasks. (K4, K8, S6, B3)	None
K8	Time management and prioritisation tools.		
S6	Use digital tools for planning and project management to monitor project progress, taking corrective action to deliver against the project plan.		
B3	Takes accountability and ownership of their tasks and workload.		

## Provider and Employer Instructions

### Assessment specification



#### Overview

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

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

#### Portfolio of evidence

The apprentice **must** compile a portfolio of evidence during the on-programme period of the apprenticeship. It should only contain evidence related to the KSBs that will be assessed by the professional discussion. It will typically contain **16 discrete pieces of evidence**. Evidence must be mapped against the KSBs using the Employer and Provider Recording Form. Evidence may be used to demonstrate more than one KSB; a **qualitative** as opposed to quantitative approach is suggested.

Evidence sources may include:

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

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

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

Any employer contributions should focus on direct observation of performance, for example, witness statements, rather than opinions. The evidence provided should be valid and attributable to the apprentice; the portfolio of evidence should contain a statement from the employer and apprentice confirming this, this statement is included in the Employer and Provider Recording form.

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

### Recommended approach for portfolio submission

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

- be an individual document, such as a Word file, or
- be organised into a folder where multiple documents are combined to support a specific piece of product evidence (e.g., a spreadsheet with a Word document providing context).
- it is advised that each folder contains no more than two documents.

### Delivery

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

An IEPA must conduct and assess the professional discussion.

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

- Building a high performing team
- Communicating and implementing operational plans
- Managing change and continuous improvement
- Using technology
- Contributing to a project

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

The IEPA must have at least two weeks to review the supporting documentation.

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

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

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

The IEPA **must ask at least five questions**. The IEPA must make the grading decision.

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

## Assessment Location

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

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

## Grading

This assessment method is graded:

- fail
- pass
- distinction

Fail, the apprentice does not meet the pass criteria. To achieve a pass the apprentice must demonstrate all of the pass descriptors. To achieve a distinction the apprentice must demonstrate all of the pass descriptors and all of the distinction descriptors.

## 9308-705 Professional discussion: themes, KSBs and grading descriptors

Theme: Building a high performing team				
Ref.	KSB	Pass	Distinction	
K2	How to identify the learning needs of others and solutions to address them.	Describes their approach to identifying and supporting the learning and development needs of team members, as well as seeking out opportunities to develop their own learning and professional development. (K2, S4, B4)	None	
S4	Identify and support the development of the team through informal coaching and continuous professional development.			
B4	Seeks learning opportunities and continuous professional development.			
K1	Performance management techniques.			Describes the leadership, management and performance management techniques and tools they use to organise, prioritise, and allocate work activities. (K1, K17, S2)
K17	Leadership and management approaches.			
S2	Use tools to organise, prioritise and allocate daily and weekly work activities.			

S12	Interpret and apply regulation and legislation, share best practices, and advise stakeholders on their application.	Explains their approach to sharing best practice and advising stakeholders on the practical application of regulation and legislation relevant to their work within the organisation. (S12)	
K10	Policy and procedure relating to people and organisational culture.	Explains how they have ethically and inclusively applied policies and procedures relating to people and organisational culture to support equity, diversity, and inclusion in the workplace. (K10, K23, B1)	Evaluates their approach to supporting and promoting equity, diversity, and inclusion in terms of impact on the workplace. (K10, K23, B1)
K23	Principles of equity, diversity and inclusion in the workplace and their impact on the organisation and the team		
B1	Acts professionally, ethically and with integrity.		
<b>Theme: Communication and implementing operational plans</b>			
<b>Ref.</b>	<b>KSB</b>	<b>Pass</b>	<b>Distinction</b>
K7	How to manage resources to implement operational and team plans.	Explains how they use and manage resources and collaborate with stakeholders to implement and deliver operational goals and team plans within their level of responsibility and accountability. (K7, K18, S1, S14)	None
K18	The purpose of their role within the organisation, including their level of responsibility and accountability.		

S1	Use resources to implement operational and team plans.		
S14	Communicate information through different media, such as face-to-face meetings, emails, reports, and presentations to enable key stakeholders to understand what is required.		
S11	Interpret organisational strategy and communicate how this impacts others.	Explains how they communicated the impact of organisational strategy on different stakeholders using different types of media to ensure understanding. (S11, S13)	Evaluates the impact of the techniques they have used to communicate how organisational strategy impacts stakeholders, suggesting improvements to facilitate their understanding of what is required. (S11, S13)
S13	Communicate information through different media, such as face-to-face meetings, emails, reports, and presentations to enable key stakeholders to understand what is required.		

Theme: Managing change and continuous improvement			
Ref.	KSB	Pass	Distinction
K13	Principles of change management and continuous improvement.	Explains how they apply the principles of change management and continuous improvement to work processes to identify areas where performance can be enhanced (K13, S7)	Evaluates the extent to which continuous improvement techniques improve work processes. (K13, S7)
S7	Review work processes to identify opportunities to improve performance and for continuous improvement.		
S10	Manage others through change by identifying challenges and the activities to resolve them.	Describes how they negotiate with and challenge stakeholders and others, when managing change, and the activities used to resolve and reduce conflict. (S10, S16)	None
S16	Negotiate with and challenge stakeholders to manage change and reduce conflict.		
K22	Approaches to managing budgets, and options and choices to maximise efficient use of resources.	Describes their approach to managing budgets and maximising the use of resources. (K22)	None

Theme: Using technology			
Ref.	KSB	Pass	Distinction
K14	IT and software used to support the activities of the business.	Describes the technology, software, and methods they use to produce documentation and support activities for the business, and how they monitor their use to reduce energy consumption when not in use. (K14, S8, S19)	None
S8	Use technology and software to produce documentation, such as spreadsheets and presentation packages to communicate information.		
S19	Monitor the use of technology and the potential to reduce energy consumption through their optimisation in day-to-day tasks, such as reducing the use of paper and switching off items when not in use.		
Theme: Contributing to a project			
Ref.	KSB	Pass	Distinction
K4	Project management tools and techniques.	Explains how they utilise project management tools and techniques to plan a project, prioritise activities, monitor progress, and take corrective action to deliver against the project	None
K8	Time management and prioritisation tools.		

S6	Use digital tools for planning and project management to monitor project progress, taking corrective action to deliver against the project plan.	plan on time whilst taking ownership of the tasks. (K4, K8, S6, B3)	
B3	Takes accountability and ownership of their tasks and workload.		

## Apprentice instructions: Professional discussion underpinned by a portfolio of evidence

### Assessment specification



#### Overview

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

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#### Portfolio of evidence

The apprentice **must** compile a portfolio of evidence during the on-programme period of the apprenticeship. It should only contain evidence related to the KSBs that will be assessed by the professional discussion. It will typically contain **16 discrete pieces of evidence**. Evidence must be mapped against the KSBs using the Employer and Provider Recording Form. Evidence may be used to demonstrate more than one KSB; a **qualitative** as opposed to quantitative approach is suggested.

Evidence sources may include:

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

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

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

Any employer contributions should focus on direct observation of performance, for example, witness statements, rather than opinions. The evidence provided should be valid and attributable to the apprentice; the portfolio of evidence should contain a statement from the employer and apprentice confirming this, this statement is included in the Employer and Provider Recording form.

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

### **Recommended approach for portfolio submission**

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

- be an individual document, such as a Word file, or
- be organised into a folder where multiple documents are combined to support a specific piece of product evidence (e.g., a spreadsheet with a Word document providing context).
- it is advised that each folder contains no more than two documents.

### **Delivery**

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

An IEPA must conduct and assess the professional discussion.

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

- Building a high performing team
- Communicating and implementing operational plans
- Managing change and continuous improvement
- Using technology
- Contributing to a project

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

The IEPA must have at least two weeks to review the supporting documentation.

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

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

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

The IEPA **must ask at least five questions**. The IEPA must make the grading decision.

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

## **Assessment Location**

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

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

## **Grading**

This assessment method is graded:

- fail
- pass
- distinction

Fail, the apprentice does not meet the pass criteria. To achieve a pass the apprentice must demonstrate all of the pass descriptors. To achieve a distinction the apprentice must demonstrate all of the pass descriptors and all of the distinction descriptors.

## 9308-705 Professional discussion: themes, KSBs and grading descriptors

Theme: Building a high performing team			
Ref.	KSB	Pass	Distinction
K2	How to identify the learning needs of others and solutions to address them.	Describes their approach to identifying and supporting the learning and development needs of team members, as well as seeking out opportunities to develop their own learning and professional development. (K2, S4, B4)	None
S4	Identify and support the development of the team through informal coaching and continuous professional development.		
B4	Seeks learning opportunities and continuous professional development.		
K1	Performance management techniques.	Describes the leadership, management and performance management techniques and tools they use to organise, prioritise, and allocate work activities. (K1, K17, S2)	
K17	Leadership and management approaches.		
S2	Use tools to organise, prioritise and allocate daily and weekly work activities.		

S12	Interpret and apply regulation and legislation, share best practices, and advise stakeholders on their application.	Explains their approach to sharing best practice and advising stakeholders on the practical application of regulation and legislation relevant to their work within the organisation. (S12)	
K10	Policy and procedure relating to people and organisational culture.	Explains how they have ethically and inclusively applied policies and procedures relating to people and organisational culture to support equity, diversity, and inclusion in the workplace. (K10, K23, B1)	Evaluates their approach to supporting and promoting equity, diversity, and inclusion in terms of impact on the workplace. (K10, K23, B1)
K23	Principles of equity, diversity and inclusion in the workplace and their impact on the organisation and the team		
B1	Acts professionally, ethically and with integrity.		

**Theme: Communication and implementing operational plans**

Ref.	KSB	Pass	Distinction
K7	How to manage resources to implement operational and team plans.	Explains how they use and manage resources and collaborate with stakeholders to implement and deliver operational goals and team plans within their level of responsibility and accountability. (K7, K18, S1, S14)	None
K18	The purpose of their role within the organisation, including their level of responsibility and accountability.		

S1	Use resources to implement operational and team plans.		
S14	Communicate information through different media, such as face-to-face meetings, emails, reports, and presentations to enable key stakeholders to understand what is required.		
S11	Interpret organisational strategy and communicate how this impacts others.	Explains how they communicated the impact of organisational strategy on different stakeholders using different types of media to ensure understanding. (S11, S13)	Evaluates the impact of the techniques they have used to communicate how organisational strategy impacts stakeholders, suggesting improvements to facilitate their understanding of what is required. (S11, S13)
S13	Communicate information through different media, such as face-to-face meetings, emails, reports, and presentations to enable key stakeholders to understand what is required.		

Theme: Managing change and continuous improvement			
Ref.	KSB	Pass	Distinction
K13	Principles of change management and continuous improvement.	Explains how they apply the principles of change management and continuous improvement to work processes to identify areas where performance can be enhanced (K13, S7)	Evaluates the extent to which continuous improvement techniques improve work processes. (K13, S7)
S7	Review work processes to identify opportunities to improve performance and for continuous improvement.		
S10	Manage others through change by identifying challenges and the activities to resolve them.	Describes how they negotiate with and challenge stakeholders and others, when managing change, and the activities used to resolve and reduce conflict. (S10, S16)	None
S16	Negotiate with and challenge stakeholders to manage change and reduce conflict.		
K22	Approaches to managing budgets, and options and choices to maximise efficient use of resources.	Describes their approach to managing budgets and maximising the use of resources. (K22)	None

Theme: Using technology			
Ref.	KSB	Pass	Distinction
K14	IT and software used to support the activities of the business.	Describes the technology, software, and methods they use to produce documentation and support activities for the business, and how they monitor their use to reduce energy consumption when not in use. (K14, S8, S19)	None
S8	Use technology and software to produce documentation, such as spreadsheets and presentation packages to communicate information.		
S19	Monitor the use of technology and the potential to reduce energy consumption through their optimisation in day-to-day tasks, such as reducing the use of paper and switching off items when not in use.		
Theme: Contributing to a project			
Ref.	KSB	Pass	Distinction
K4	Project management tools and techniques.	Explains how they utilise project management tools and techniques to plan a project, prioritise activities, monitor progress, and take corrective action to deliver against the project	None
K8	Time management and prioritisation tools.		

S6	Use digital tools for planning and project management to monitor project progress, taking corrective action to deliver against the project plan.	plan on time whilst taking ownership of the tasks. (K4, K8, S6, B3)	
B3	Takes accountability and ownership of their tasks and workload.		

## 7. Assessment instructions: 9308-706 Presentation with questions



### Knowledge, Skills and Behaviours

KSB Coverage	Grade
<p><b>Knowledge:</b></p> <p>K3 Processes and policies which support the delivery of operational requirements.</p> <p>K5 Relevant regulation, legislation, and compliance that impacts their role and the organisation.</p> <p>K6 Organisational strategy and objectives and how their role impacts on them.</p> <p>K9 Communication techniques including presentation skills, negotiation and influencing skills.</p> <p>K11 Stakeholder management.</p> <p>K12 Problem-solving and decision-making principles.</p> <p>K15 External factors that affect the workplace, such as sustainability and net carbon zero, and how they are managed.</p> <p>K16 The impact that internal and external factors such as environmental impacts, have on their role.</p> <p><b>Skills:</b></p> <p>S3 Able to collate and interpret data and information and create reports.</p> <p>S5 Use information and problem-solving techniques to provide solutions and influence the decision-making process.</p> <p>S9 Manage individual or team performance by setting objectives, monitoring progress, and providing clear guidance and feedback.</p> <p>S15 Manage and maintain relationships with a diverse workforce and stakeholders.</p> <p>S17 Interpret policy and support the delivery of equity, diversity and inclusion in the workplace and monitor their impact on their team.</p>	<p>Fail / Pass / Distinction</p>

KSB Coverage	Grade
<p>S18 Identify future changes in the sector such as technology advances that may impact their organisation.</p> <p><b>Behaviours:</b></p> <p>B2 Supports an inclusive culture, treating colleagues and external stakeholders fairly and with respect.</p> <p>B5 Works flexibly and adapts to circumstances.</p>	

## Assessment specification

### Overview

In the presentation with questions, the apprentice delivers a presentation to an IEPA on a set topic. The IEPA must ask questions **after the presentation**. It gives the apprentice the opportunity to demonstrate the KSBs mapped to this assessment method.

### Delivery

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

An IEPA must conduct and assess the presentation with questions.

The presentation must cover a summary of apprentice's role as a team leader, what they do and how this is relevant to their role and the organisation. It should focus on how they tackle current topics and will cover all KSBs assigned to this method.

**Following a discussion with the employer**, the apprentice will be given their presentation topic post gateway by the IEPA.

**The presentation will be based on one of the following topics:**

- Reviewing ways to reduce cost and increase efficiency in a business environment
- Using data and technology to support organisational goals
- Improving team performance to support organisational goals
- Leading and supporting a team through a period of change within the organisation
- Reviewing the impact of cross team working to achieve organisational strategy and objectives
- Managing and maintaining stakeholder relationships to influence organisational strategy and support workplace inclusion
- Using communication and problem-solving skills to drive successful outcomes

ILM/City & Guilds will take steps to ensure the apprentice is given a presentation topic, which allows the apprentice the opportunity to draw on what they have learnt and experienced during their apprenticeship. The purpose of the presentation is to allow the apprentice to demonstrate their competence against the grading descriptors.

The presentation should cover the following themes:

- Data collection and benchmarking
- Problem analysis and conclusions
- People and relationships

- Future plans and opportunities

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

During the presentation, the apprentice must have access to:

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

The IEPA must have at least two weeks to review any presentation materials, before the presentation is delivered by the apprentice, to allow them to prepare questions. The ILM/City & Guilds must give the apprentice at least one week's notice of the presentation assessment.

**The IEPA must ask questions after the presentation.**

The purpose of the questions is:

- to seek clarification where required
- to assess the level of competence against the grading descriptors.

The presentation and questions **must last 50 minutes**. This will typically include a presentation of 20 minutes and **questioning lasting 30 minutes**. The IEPA must use the full time available for questioning. The IEPA can increase the total time of the presentation and questioning by up to 10%. This time is to allow the apprentice to complete their last point or respond to a question if necessary.

**The IEPA must ask at least five questions.**

The IEPA must make the grading decision. The IEPA must assess the presentation and answers to questions holistically when deciding the grade.

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

## Assessment Location

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

The presentation with questions should take place in a quiet room, free from distractions and influence.

## Grading

This assessment method is graded:

- fail
- pass
- distinction

Fail, the apprentice does not meet the pass criteria. To achieve a pass the apprentice must demonstrate all of the pass descriptors. To achieve a distinction the apprentice must demonstrate all of the pass descriptors and all of the distinction descriptors.

## 9308-706 Presentation with questions: themes, KSBs and grading descriptors

Theme: Data collection and benchmarking			
Ref.	KSB	Pass	Distinction
K3	Processes and policies which support the delivery of operational requirements.	Outlines the processes and policies supporting the delivery (of the chosen topic) and the regulation, legislation and compliance which impacts their role and the organisation. (K3, K5)	None
K5	Relevant regulation, legislation, and compliance that impacts their role and the organisation.		
K15	External factors that affect the workplace, such as sustainability and net carbon zero, and how they are managed.	Explains how (the chosen topic) considers external factors affecting the workplace, how they are managed, and the influence of the wider social and economic environment in which the organisation operates. (K15, K21)	Evaluates the impact of external factors and the influence of the wider social and economic environment in which the organisation operates (on the chosen topic). (K15, K21)
K21	The wider social and economic environment in which the organisation operates.		
K20	How to collate, interpret and communicate data and information to meet the needs of different audiences.	Collates and interprets data and information to create reports tailored to the needs of different audiences. (K20, S3)	Evaluates how well the reports they created met the needs of different audiences. (K20, S3)

S3	Able to collate and interpret data and information and create reports.		
<b>Theme: Problem analysis and conclusions</b>			
Ref.	KSB	Pass	Distinction
K6	Organisational strategy and objectives and how their role impacts on them.	Explains how their role impacts on the organisation's strategy and objectives and the impact that cross team working has on delivering them. (K6, K19)	None
K19	The impact that cross-team working has in the delivery of organisational objectives.		
K9	Communication techniques including presentation skills, negotiation and influencing skills.	Applies communication techniques, problem-solving and decision-making principles to provide solutions and influence the decision-making process. (K9, K12, S5)	Justifies their selection of communication techniques, problem-solving and decision-making principles to provide solutions and influence the decision-making process. (K9, K12, S5)
K12	Problem-solving and decision-making principles.		
S5	Use information and problem-solving techniques to provide solutions and influence the decision-making process.		

Theme: People and relationships			
Ref	KSB	Pass	Distinction
K11	Stakeholder management.	Explains how they manage and maintain relationships with a diverse workforce and stakeholders, set objectives, monitor progress, and provide guidance and feedback for individual and team performances. (K11, S9, S15)	None
S9	Manage individual or team performance by setting objectives, monitoring progress, and providing clear guidance and feedback.		
S15	Manage and maintain relationships with a diverse workforce and stakeholders.		
S17	Interpret policy and support the delivery of equity, diversity and inclusion in the workplace and monitor their impact on their team.	Explains how they proactively support the delivery of equity, diversity and inclusion in the workplace and monitor the impact on their team. (S17, B2)	Evaluates the impact in the workplace of promoting an inclusive culture. (S17, B2)
Theme: Future plans and opportunities			
Ref.	KSB	Pass	Distinction
K16	The impact that internal and external factors such as environmental impacts, have on their role.	Describes the impact of internal and external factors on their role, identifying how they will work flexibly	None

S18	Identify future changes in the sector such as technology advances that may impact their organisation.	to adapt to future changes in the sector that may affect their organisation. (K16, S18, B5)	
B5	Works flexibly and adapts to circumstances.		

## Provider and Employer Instructions

### Overview

In the presentation with questions, the apprentice delivers a presentation to an IEPA on a set topic. The IEPA must ask questions **after the presentation**. It allows the apprentice to demonstrate the KSBs mapped to this assessment method.



### Delivery

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

An IEPA must conduct and assess the presentation with questions.

The presentation must cover a summary of apprentice's role as a team leader, what they do and how this is relevant to their role and the organisation. It should focus on how they tackle current topics and will cover all KSBs assigned to this method.

**Following a discussion with the employer**, the apprentice will be given their presentation topic post gateway by the IEPA.

**The presentation will be based on one of the following topics:**

- Reviewing ways to reduce cost and increase efficiency in a business environment
- Using data and technology to support organisational goals
- Improving team performance to support organisational goals
- Leading and supporting a team through a period of change within the organisation
- Reviewing the impact of cross team working to achieve organisational strategy and objectives
- Managing and maintaining stakeholder relationships to influence organisational strategy and support workplace inclusion
- Using communication and problem-solving skills to drive successful outcomes

ILM/City & Guilds will take steps to ensure the apprentice is given a presentation topic, which allows the apprentice the opportunity to draw on what they have learnt and experienced during their apprenticeship. The purpose of the presentation is to allow the apprentice to demonstrate their competence against the grading descriptors.

The presentation should cover the following themes:

- Data collection and benchmarking

- Problem analysis and conclusions
- People and relationships
- Future plans and opportunities

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

During the presentation, the apprentice must have access to:

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

The IEPA must have at least two weeks to review any presentation materials, before the presentation is delivered by the apprentice, to allow them to prepare questions. The ILM/City & Guilds must give the apprentice at least one week's notice of the presentation assessment.

**The IEPA must ask questions after the presentation.**

The purpose of the questions is:

- to seek clarification where required
- to assess the level of competence against the grading descriptors.

The presentation and questions **must last 50 minutes**. This will typically include a **presentation of 20 minutes** and **questioning lasting 30 minutes**. The IEPA must use the full time available for questioning. The IEPA can increase the total time of the presentation and questioning by up to 10%. This time is to allow the apprentice to complete their last point or respond to a question if necessary.

**The IEPA must ask at least five questions.**

The IEPA must make the grading decision. The IEPA must assess the presentation and answers to questions holistically when deciding the grade.

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

### **Assessment Location**

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

The presentation with questions should take place in a quiet room, free from distractions and influence.

## Grading

This assessment method is graded:

- fail
- pass
- distinction

Fail, the apprentice does not meet the pass criteria. To achieve a pass the apprentice must demonstrate all of the pass descriptors. To achieve a distinction the apprentice must demonstrate all of the pass descriptors and all of the distinction descriptors.

## 9308-706 Presentation with questions: themes, KSBs and grading descriptors

Theme: Data collection and benchmarking			
Ref.	KSB	Pass	Distinction
K3	Processes and policies which support the delivery of operational requirements.	Outlines the processes and policies supporting the delivery (of the chosen topic) and the regulation, legislation and compliance which impacts their role and the organisation. (K3, K5)	None
K5	Relevant regulation, legislation, and compliance that impacts their role and the organisation.		
K15	External factors that affect the workplace, such as sustainability and net carbon zero, and how they are managed.	Explains how (the chosen topic) considers external factors affecting the workplace, how they are managed, and the influence of the wider social and economic environment in which the organisation operates. (K15, K21)	Evaluates the impact of external factors and the influence of the wider social and economic environment in which the organisation operates (on the chosen topic). (K15, K21)
K21	The wider social and economic environment in which the organisation operates.		
K20	How to collate, interpret and communicate data and information to	Collates and interprets data and information to create reports tailored	

	meet the needs of different audiences.	to the needs of different audiences. (K20, S3)	Evaluates how well the reports they created met the needs of different audiences. (K20, S3)
S3	Able to collate and interpret data and information and create reports.		

**Theme: Problem analysis and conclusions**

Ref.	KSB	Pass	Distinction
K6	Organisational strategy and objectives and how their role impacts on them.	Explains how their role impacts on the organisation's strategy and objectives and the impact that cross team working has on delivering them. (K6, K19)	None
K19	The impact that cross-team working has in the delivery of organisational objectives.		
K9	Communication techniques including presentation skills, negotiation and influencing skills.	Applies communication techniques, problem-solving and decision-making principles to provide solutions and influence the decision-making process. (K9, K12, S5)	Justifies their selection of communication techniques, problem-solving and decision-making principles to provide solutions and influence the decision-making process. (K9, K12, S5)
K12	Problem-solving and decision-making principles.		
S5	Use information and problem-solving techniques to provide solutions and influence the decision-making process.		

Theme: People and relationships			
Ref	KSB	Pass	Distinction
K11	Stakeholder management.	Explains how they manage and maintain relationships with a diverse workforce and stakeholders, set objectives, monitor progress, and provide guidance and feedback for individual and team performances. (K11, S9, S15)	None
S9	Manage individual or team performance by setting objectives, monitoring progress, and providing clear guidance and feedback.		
S15	Manage and maintain relationships with a diverse workforce and stakeholders.		
S17	Interpret policy and support the delivery of equity, diversity and inclusion in the workplace and monitor their impact on their team.	Explains how they proactively support the delivery of equity, diversity and inclusion in the workplace and monitor the impact on their team. (S17, B2)	Evaluates the impact in the workplace of promoting an inclusive culture. (S17, B2)
Theme: Future plans and opportunities			
Ref.	KSB	Pass	Distinction

K16	The impact that internal and external factors such as environmental impacts, have on their role.	Describes the impact of internal and external factors on their role, identifying how they will work flexibly to adapt to future changes in the sector that may affect their organisation. (K16, S18, B5)	None
S18	Identify future changes in the sector such as technology advances that may impact their organisation.		
B5	Works flexibly and adapts to circumstances.		

## Apprentice instructions: 9308-706

### Presentation with questions

#### Overview

In the presentation with questions, the apprentice delivers a presentation to an IEPA on a set topic. The IEPA must ask questions **after the presentation**. It gives the apprentice the opportunity to demonstrate the KSBs mapped to this assessment method.



#### Delivery

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

An IEPA must conduct and assess the presentation with questions.

The presentation must cover a summary of apprentice's role as a team leader, what they do and how this is relevant to their role and the organisation. It should focus on how they tackle current topics and will cover all KSBs assigned to this method.

**Following a discussion with the employer**, the apprentice will be given their presentation topic post gateway by the IEPA.

#### The presentation will be based on one of the following topics:

- Reviewing ways to reduce cost and increase efficiency in a business environment
- Using data and technology to support organisational goals
- Improving team performance to support organisational goals
- Leading and supporting a team through a period of change within the organisation
- Reviewing the impact of cross team working to achieve organisational strategy and objectives
- Managing and maintaining stakeholder relationships to influence organisational strategy and support workplace inclusion
- Using communication and problem-solving skills to drive successful outcomes

ILM/City & Guilds will take steps to ensure the apprentice is given a presentation topic, which allows the apprentice the opportunity to draw on what they have learnt and experienced during their apprenticeship. The purpose of the presentation is to allow the apprentice to demonstrate their competence against the grading descriptors.

The presentation should cover the following themes:

- Data collection and benchmarking
- Problem analysis and conclusions
- People and relationships
- Future plans and opportunities

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

During the presentation, the apprentice must have access to:

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

The IEPA must have at least two weeks to review any presentation materials, before the presentation is delivered by the apprentice, to allow them to prepare questions. The ILM/City & Guilds must give the apprentice at least one weeks' notice of the presentation assessment.

**The IEPA must ask questions after the presentation.**

The purpose of the questions is:

- to seek clarification where required
- to assess the level of competence against the grading descriptors.

The presentation and questions **must last 50 minutes**. This will typically include a **presentation of 20 minutes** and **questioning lasting 30 minutes**. The IEPA must use the full time available for questioning. The IEPA can increase the total time of the presentation and questioning by up to 10%. This time is to allow the apprentice to complete their last point or respond to a question if necessary.

**The IEPA must ask at least five questions.**

The IEPA must make the grading decision. The IEPA must assess the presentation and answers to questions holistically when deciding the grade.

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

### **Assessment Location**

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

The presentation with questions should take place in a quiet room, free from distractions and influence.

## Grading

This assessment method is graded:

- fail
- pass
- distinction

Fail, the apprentice does not meet the pass criteria. To achieve a pass the apprentice must demonstrate all of the pass descriptors. To achieve a distinction the apprentice must demonstrate all of the pass descriptors and all of the distinction descriptors.

## 9308-706 Presentation with questions: themes, KSBs and grading descriptors

Theme: Data collection and benchmarking			
Ref.	KSB	Pass	Distinction
K3	Processes and policies which support the delivery of operational requirements.	Outlines the processes and policies supporting the delivery (of the chosen topic) and the regulation, legislation and compliance which impacts their role and the organisation. (K3, K5)	None
K5	Relevant regulation, legislation, and compliance that impacts their role and the organisation.		
K15	External factors that affect the workplace, such as sustainability and net carbon zero, and how they are managed.	Explains how (the chosen topic) considers external factors affecting the workplace, how they are managed, and the influence of the wider social and economic environment in which the organisation operates. (K15, K21)	Evaluates the impact of external factors and the influence of the wider social and economic environment in which the organisation operates (on the chosen topic). (K15, K21)
K21	The wider social and economic environment in which the organisation operates.		
K20	How to collate, interpret and communicate data and information to	Collates and interprets data and information to create reports tailored	

	meet the needs of different audiences.	to the needs of different audiences. (K20, S3)	Evaluates how well the reports they created met the needs of different audiences. (K20, S3)
S3	Able to collate and interpret data and information and create reports.		

**Theme: Problem analysis and conclusions**

Ref.	KSB	Pass	Distinction
K6	Organisational strategy and objectives and how their role impacts on them.	Explains how their role impacts on the organisation's strategy and objectives and the impact that cross team working has on delivering them. (K6, K19)	None
K19	The impact that cross-team working has in the delivery of organisational objectives.		
K9	Communication techniques including presentation skills, negotiation and influencing skills.	Applies communication techniques, problem-solving and decision-making principles to provide solutions and influence the decision-making process. (K9, K12, S5)	Justifies their selection of communication techniques, problem-solving and decision-making principles to provide solutions and influence the decision-making process. (K9, K12, S5)
K12	Problem-solving and decision-making principles.		
S5	Use information and problem-solving techniques to provide solutions and influence the decision-making process.		

Theme: People and relationships			
Ref	KSB	Pass	Distinction
K11	Stakeholder management.	Explains how they manage and maintain relationships with a diverse workforce and stakeholders, set objectives, monitor progress, and provide guidance and feedback for individual and team performances. (K11, S9, S15)	None
S9	Manage individual or team performance by setting objectives, monitoring progress, and providing clear guidance and feedback.		
S15	Manage and maintain relationships with a diverse workforce and stakeholders.		
S17	Interpret policy and support the delivery of equity, diversity and inclusion in the workplace and monitor their impact on their team.	Explains how they proactively support the delivery of equity, diversity and inclusion in the workplace and monitor the impact on their team. (S17, B2)	Evaluates the impact in the workplace of promoting an inclusive culture. (S17, B2)
Theme: Future plans and opportunities			
Ref.	KSB	Pass	Distinction

K16	The impact that internal and external factors such as environmental impacts, have on their role.	Describes the impact of internal and external factors on their role, identifying how they will work flexibly to adapt to future changes in the sector that may affect their organisation. (K16, S18, B5)	None
S18	Identify future changes in the sector such as technology advances that may impact their organisation.		
B5	Works flexibly and adapts to circumstances.		

## 8. Re-sits and Re-takes

Apprentices who fail one or more assessments will be offered the opportunity to take a re-sit or 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

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

The employer and the IEPA should agree the timescale for a re-sit or re-take. A re-sit is typically taken within 2 months of the EPA outcome notification. The timescale for a re-take is dependent on how much re-training is required and is typically taken within 3 months of the EPA outcome notification. **If the apprentice fails the presentation with questions assessment method they will need to be given a new topic to present on.**

Failed assessment methods must be re-sat or re-taken within a six-month period from the EPA outcome notification, otherwise the entire EPA will need to be re-sat or re-taken in full.

Re-sits and re-takes are not offered to an apprentice wishing to move from pass to a higher grade.

The apprentice will get a maximum EPA grade of a pass if they need to re-sit or re-take one or more assessment methods unless ILM/City & Guilds determines there are exceptional circumstances.



## 9. Contact Us

EPA Gateway Team: Initial Reservation & Gateway

[epa.gateway@cityandguilds.com](mailto:epa.gateway@cityandguilds.com)

EPA Events Team: Bookings & Cancellations (Post Gateway)

[EPA@cityandguilds.com](mailto:EPA@cityandguilds.com)

Technical Advisors: Sector Specific Guidance

[Technical Advisors contact details](#)

City & Guilds Sales Team

[directsales@cityandguilds.com](mailto:directsales@cityandguilds.com)

ILM Sales Team

01543 266 867

[customer@i-l-m.com](mailto:customer@i-l-m.com)

City & Guilds Customer Services Team

01924 930800 (option 5 EPA)

[centresupport@cityandguilds.com](mailto:centresupport@cityandguilds.com)

ILM Customer Services Team

01543 266 867

[customer@i-l-m.com](mailto:customer@i-l-m.com)

Digital Sales: on-programme delivery resources

[Digitalsales@cityandguilds.com](mailto:Digitalsales@cityandguilds.com)

Digital Credentials

[digitalsupport@cityandguilds.com](mailto:digitalsupport@cityandguilds.com)

Digital Credentials: bulk email uploads

[DCServiceTeam@cityandguilds.com](mailto:DCServiceTeam@cityandguilds.com)

## 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.

## City and Guilds Group

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