

# End-point assessment plan for Senior People Professional apprenticeship standard

Apprenticeship standard number	Apprenticeship standard level	Integrated end-point assessment
ST0813	7	No

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## Introduction and overview

This document sets out the requirements for end-point assessment (EPA) for the Senior People Professional apprenticeship standard. It is for end-point assessment organisations (EPAOs) who need to know how EPA for this apprenticeship must operate. It will also be of interest to Senior People Professional apprentices, their employers and training providers.

Full time apprentices will typically spend 36 months on-programme (before the gateway) working towards this occupational standard, with a minimum of 20% off-the-job training. All apprentices must spend a minimum of 12 months on-programme.

The EPA period should only start, and the EPA be arranged, once the employer is satisfied that the apprentice is deemed to be consistently working at or above the level set out in the occupational standard, all of the pre-requisite gateway requirements for EPA have been met and can be evidenced to an EPAO.

For level 3 apprenticeships and above apprentices without English and mathematics at level 2 must achieve level 2 prior to taking their EPA. The EPA must be completed within an EPA period lasting typically 4 months, after the EPA gateway.

EPA must be conducted by an EPAO approved to deliver EPA for this apprenticeship standard. Each employer should select an approved EPAO from the Education & Skills Funding Agency's Register of end-point assessment organisations (RoEPAO)

The EPA consists of 2 discrete assessment methods.

NB – this Apprenticeship takes a “core and options” approach. Each apprentice must demonstrate competency across all of the knowledge, skills and behaviours (KSBs) in the core, together with all of the KSBs in just one of the 3 options.

These options are

1. Organisational Development
2. Learning & Development
3. Human Resources.

The core is assessed across assessment methods 1 and 2 as set out below, whereas the options are only tested in assessment method 1.

The individual assessment methods will have the following grades:

**Assessment method 1:** Professional discussion, underpinned by a portfolio of evidence

- Fail
- Pass
- Distinction

**Assessment method 2:** Project proposal, presentation and questioning

- Fail
- Pass
- Distinction

Performance in the EPA will determine the overall apprenticeship standard grade of:

- Fail
- Pass
- Distinction

## EPA summary table

<b>On-programme</b> (typically 36 months)	<p>Training to develop the occupation standard's knowledge, skills and behaviours (KSBs).</p> <p>Training towards English and mathematics Level 2, if required.</p> <p>Compiling of a portfolio of evidence.</p>
<b>End-point assessment gateway</b>	<p>The employer must be content that the apprentice is working at or above the level of the occupational standard.</p> <p>Apprentices must have achieved English and mathematics at Level 2.</p> <p>Apprentices must submit a portfolio of evidence to their EPAO, which will underpin the professional discussion end-point assessment method.</p> <p>The EPAO should sign off the work-based project proposal's title and scope to confirm its suitability at the gateway</p>
<b>End-point assessment</b> (typically 4 months)	<p>Assessment method 1: Professional discussion underpinned by a portfolio of evidence</p> <p>With the following grades:</p> <ul style="list-style-type: none"> <li>• Fail</li> <li>• Pass</li> <li>• Distinction</li> </ul> <p>Assessment method 2: Project proposal, presentation and questioning</p> <p>With the following grades:</p> <ul style="list-style-type: none"> <li>• Fail</li> <li>• Pass</li> <li>• Distinction</li> </ul> <p>Performance in the EPA will determine the overall apprenticeship standard grade of:</p> <ul style="list-style-type: none"> <li>• Fail</li> <li>• Pass</li> <li>• Distinction</li> </ul>
<b>Professional recognition</b>	<p>Aligns with recognition by:</p> <p>CIPD – Chartered Member</p>

## Length of end-point assessment period

The EPA will be completed within an EPA period lasting typically of 4 months, starting when the EPAO has confirmed all the gateway requirements have been met.

Any supporting material which underpins an EPA assessment method should be submitted at the gateway.

## Order of end-point assessment methods

The assessment methods can be delivered in any order. The result of one assessment method does not have to be known before starting the next one.

## EPA gateway

The EPA period should only start once the employer is satisfied that the apprentice is consistently working at or above the level set out in the occupational standard, that is to say they are deemed to have achieved occupational competence. In making this decision, the employer may take advice from the apprentice's training provider(s), but the decision must ultimately be made solely by the employer.

In addition to the employer's confirmation that the apprentice is working at or above the level of the occupational standard, the apprentice must have completed the following gateway requirements prior to starting EPA:

- achieved English and mathematics at Level 2.

For those with an education, health and care plan or a legacy statement, the apprenticeship's English and mathematics minimum requirement is Entry Level 3. British Sign Language (BSL) qualifications are an alternative to English qualifications for those who have BSL as their primary language.

For the professional discussion underpinned by a portfolio of evidence, the apprentice will be required to submit:

- a completed portfolio of evidence.

### **Portfolio of evidence requirements:**

- apprentices must compile a portfolio of evidence during the on-programme period of the apprenticeship
- it must contain evidence related to the KSBs that will be assessed by the professional discussion
- the portfolio of evidence will typically contain 15 discrete pieces of evidence
- evidence must be clearly mapped, in an annex, against the KSBs allocated to this assessment method
- 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/records, for example workplace policies/procedures/processes, records
  - witness statements
  - annotated photographs
  - video clips (maximum total duration 15 minutes); the apprentice must be in view and identifiable
  - people plans and strategies, communications

This is not a definitive list; other evidence sources are possible.
- it 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 must be valid and attributable to the apprentice; the portfolio of evidence must contain a statement from the employer and apprentice confirming this
- the portfolio of evidence must be submitted to the EPAO at the gateway

The portfolio of evidence is not directly assessed. It underpins the professional discussion and therefore should not be marked by the EPAO. EPAOs should review the portfolio of evidence in preparation for the professional discussion but are not required to provide feedback after this review of the portfolio.

For the project proposal, presentation and questioning:

- The EPAO should sign off the work-based project proposal's title and scope to confirm its suitability at the gateway.

## End-point assessment methods

The apprentice will be assessed against the KSBs assigned to the assessment methods outlined below, as shown in the mapping section of this EPA plan.

### Assessment methods

#### Assessment method 1: Professional discussion underpinned by a portfolio of evidence (This assessment method has 1 component.)

##### Assessment method 1 component 1: Professional discussion underpinned by a portfolio of evidence

###### Overview

This assessment will take the form of a professional discussion which must be appropriately structured to draw out the best of the apprentice's competence and excellence and cover the KSBs assigned to this assessment method.

A professional discussion is a two-way discussion which involves both the independent assessor and the apprentice actively listening and participating in a formal conversation. It gives the apprentice the opportunity to make detailed and proactive contributions to confirm their competency across the KSBs mapped to this method.

The professional discussion is mapped to the core KSBs together with the chosen option that the apprentice has taken out of Organisational Development, Learning & Development, and Human Resources. See the mapping section of this EPA plan for further detail.

The rationale for this assessment method is:

- it allows the apprentice to be assessed against KSBs that may not naturally occur during other assessment methods
- it allows scope for the apprentice to demonstrate the depth and breadth of KSBs, allowing for a distinction grading
- it allows for testing of responses where there are a number of potential answers that could not be tested through a multiple-choice test
- it is cost effective, as it can be conducted remotely

###### Delivery

The independent assessor will conduct and assess the professional discussion.

The EPAO will provide the apprentice with 3 weeks' notice prior to the professional discussion. The EPAO will provide the independent assessor with 3 weeks to review the portfolio prior to the discussion.

The professional discussion must last for 120 minutes. The independent assessor has the discretion to increase the time of the professional discussion by up to 10% to allow the apprentice to complete their last answer. Further time may be granted for apprentices with appropriate needs, in accordance with the EPAO's Reasonable Adjustments policy.



During this method, the independent assessor must combine questions from the EPAO's question bank and those generated by themselves.

The professional discussion will be conducted as set out here:

- The professional discussion must be appropriately structured to draw out the best of the apprentice's competence and excellence.

Independent assessors must use the question bank as a source for questioning and are expected to use their professional judgement to tailor those questions appropriately. Independent assessors will ask a minimum of 10 questions and may ask further questions for clarification purposes and to allow the apprentice the opportunity to cover the KSBs mapped to this assessment method.

The apprentice and the independent assessor will have access to their own copies of the portfolio throughout the professional discussion and both can refer to it as needed; however the portfolio of evidence is not directly assessed.

Independent assessors must be developed and trained in the conduct of professional discussions, how to design their own questions from reviewing portfolio content, and in reaching consistent judgement by their EPAO. The independent assessor will make notes of the apprentices' response to questions.

The professional discussion should be graded fail, pass or distinction. The portfolio underpins the professional discussion and will not be assessed or graded. Independent assessors must allocate grades using the grading criteria.

The independent assessor must use the assessment tools and procedures that are set by the EPAO to record the professional discussion.

KSBs met and answers to questions, must be recorded by the independent assessor.

The independent assessor will make all grading decisions.

### **Assessment location**

The professional discussion should take place in a quiet room, free from distractions and influence. Video conferencing can be used to conduct the professional discussion, but the EPAO must have processes in place to verify the identity of the apprentice and ensure the apprentice is not being aided.

The professional discussion can take place in any of the following:

- employer's premises
- training provider's premises
- assessment centres
- EPAO's premises
- other suitable venue selected by the EPAO (for example a training provider)
- via video conferencing

## Question and resource development

A question bank must be developed by EPAOs. The question bank must be of sufficient size to prevent predictability and the EPAO must review it regularly (at least once a year) to ensure that it, and its content, are fit for purpose. The questions relating to the underpinning KSBs, must be varied yet allow assessment of the relevant KSBs. Independent assessors must use the question bank as a source for questions and are expected to use their professional judgement to tailor those questions appropriately. Independent assessors are responsible for asking suitable questions in line with the EPAO's training and standardisation process.

EPAOs must ensure that apprentices have a different set of questions in the case of re-sits/re-takes.

EPAOs will produce the following material to support this assessment method:

- outline of the assessment method's requirements
- a question bank
- marking materials
- independent assessor training materials
- grading guidance for employers, apprentices and independent assessors
- guidance document for independent assessors on how to carry out the assessment
- assessment recording documentation

## Assessment method 2: Project proposal, presentation and questioning (This assessment method has 2 components.)

### Overview

The assessment method is the production of a project proposal, presentation and questioning. The work is carried out after the apprentice has gone through the gateway.

A project proposal involves the apprentice completing a relevant and defined piece of work that has a real business benefit. The project proposal must be undertaken after the apprentice has gone through the gateway. Apprentices will prepare and deliver a presentation that, along with the proposal, appropriately covers the KSBs assigned to this method of assessment. It will be followed by questioning from the independent assessor.

The project proposal should be designed to ensure that the apprentice's work meets the needs of the business, is relevant to their role and allows the relevant KSBs to be assessed for the EPA. The employer will ensure it has a real business application and the EPAO will ensure it meets the requirements of the EPA, including suitable coverage of the KSBs assigned to this assessment method as shown in the mapping of assessment methods.

The proposed project does not need to be fully implemented during the EPA period, but it must be a comprehensive proposal that will enable full implementation at an appropriate time for the organisation. The project proposal must include evidence of board or senior leader sign-off for implementation to ensure assessment of S14i. The full range of KSBs needs to be evidenced.

The EPAO must refer to the grading descriptors to ensure that project proposals are pitched appropriately.

This assessment method includes two components:

- a project proposal - a proposal based on post-gateway work
- a presentation with questioning

Both components should allow the apprentice the opportunity to obtain the highest possible grade. The combination of the components makes the method more robust and gives the apprentice an opportunity to provide depth.

The rationale for this assessment method is:

- The project proposal is designed to demonstrate the application of knowledge, skills and behaviours as they would occur in occupational practice. Producing a proposal reflects normal practice in the workplace for senior people professionals, so this assessment method is appropriate.
- It is a significant and relevant piece of work that thoroughly tests both higher and lower order knowledge, skills and behaviours.
- The project proposal should have a real business benefit and is therefore a cost-effective assessment method.

The evidence from the project proposal, presentation and responses to questions will be assessed holistically.

## Assessment method 2 component 1: Project proposal

### Delivery

Apprentices will conduct a project proposal either paper based or electronically.

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

- The need to review and agree a change plan to improve a people solution within the workplace
- The continuous improvement review of a current process, service or product to ensure it is still fit for purpose and meets the current needs of the business
- The planning and design of a project that has strategic relevance and the potential to add value to the organisation

The list above is not exhaustive but the EPAO should sign off the project proposal's title and scope to confirm its suitability at the gateway. The employer is responsible for ensuring it has a real business benefit and the EPAO is responsible for confirming that it provides appropriate coverage of the KSBs. In order to ensure that all the EPA related work is completed during the EPA period, the EPAO must be involved in determining the focus of the project scope and title at the gateway.

The project proposal starts after the apprentice has gone through the gateway. The typical duration of the project proposal should be 12 weeks.

The employer should ensure the apprentice has sufficient time and the necessary resources, within this period, to plan and undertake the work associated with the project proposal.

The EPAO must provide a generic specification for a range of qualifying projects, to enable the employer to select a project that will meet the requirements of the EPA. Note that the employer is not

restricted to this selection; however, the project scope and title must be signed off at the gateway by the EPAO to ensure sufficient coverage of the assigned KSBs.

The project proposal will be 7,000 words (+/- 10% at the apprentice's discretion) including tables, graphs, figures, though excluding references and annexes. The apprentice will have 12 weeks to write and submit the proposal and the presentation following the EPAO's approval of the project proposal's scope and title.

In order to ensure the project proposal is robust and sufficiently covers the KSBs, it should include:

- An executive summary
- An introduction
- The scope of the proposed project (including key performance indicators)
- Objectives
- How the proposed project outcomes would be achieved
- Comment on the validity of the methods of analysis, data interpretation and data presentation used
- Proposed implementation plan including communications and stakeholder plans
- Advise whether an alternative approach might be considered
- Recommendations and conclusions

The project proposal must include, in addition to the word count, an annex showing how the project proposal maps to the KSBs that are being assessed by this method.

The project proposal, plus materials relating to the presentation (see below), must be submitted together after the gateway.

The apprentice must complete their project proposal unaided. When the project proposal is submitted, the apprentice and their employer must verify that the submitted project proposal is the apprentice's own work and include evidence of board or senior leader sign-off for implementation.

The independent assessor will review and assess the project proposal holistically together with the other components of this assessment method.

The independent assessor will make all grading decisions.

## **Assessment method 2 component 2 – Presentation with questioning**

A presentation with questioning involves an apprentice presenting to an independent assessor, focusing on the list below. It will be followed by questioning from the independent assessor.

Apprentices will prepare and deliver a presentation that appropriately covers the KSBs assigned to this method of assessment. The purpose of the questioning is to seek clarification of the project proposal and/or presentation, to assess the depth and breadth of knowledge, skills and behaviours and to assess those KSBs that the apprentice did not have the opportunity to demonstrate with the project proposal, although these should be kept to a minimum.

The apprentice needs to notify the EPAO at the submission of the project proposal and presentation of any technical requirements for the presentation component.

## Delivery

The presentation will focus on the project proposal and will cover the following:

- What were the intended outcomes of the project proposal?
- How have they undertaken the planning for the project proposal?
- What was the rationale for the activities?
- Outcomes of the board or senior leader sign-off
- Further recommendations for consideration

The independent assessor will then draw out any further information using questions.

The presentation must be submitted with the project proposal 12 weeks after the gateway. The apprentice will be given 3 weeks' notice of the presentation date. The independent assessor will have 2 weeks to review the project proposal and presentation and prepare appropriate questions. The presentation and questioning will take 60 minutes. The independent assessor has the discretion to increase the time of the presentation and questioning by up to 10% to allow the apprentice to complete their last answer. The presentation will typically last for 20 minutes, and the questioning will typically last for 40 minutes. The discretionary additional 10% time can be allocated in any proportion across the presentation and questioning.

The independent assessor will ask a minimum of 8 questions at the end of the presentation. The independent assessor will use the questions from a question bank supplied by the EPAO as a guide to tailor their own questions based on the presentation. They will use them to confirm their understanding of the presentation and how it demonstrates the relevant KSBs. They may ask follow-up questions where clarification is required. The independent assessor must use the full time available for questioning to allow the apprentice the opportunity to evidence occupational competence at the highest level available, unless the apprentice has already achieved the highest grade available.

The purpose of the questions will be:

- for clarification
- to assess the depth and breadth of understanding

To deliver the presentation, the apprentice will have access to:

- audio-visual presentation equipment
- flip chart and writing and drawing materials
- computer
- any other reasonable requirements as notified to the EPAO on submission of the project proposal and presentation

KSBs met and answers to questions, must be recorded by the independent assessor.

The independent assessor will make all grading decisions.

## Assessment location

EPAOs must ensure that the presentation and questioning elements are conducted in a suitable controlled environment in any of the following:

- Employer's premises
- A suitable venue sourced by the EPAO e.g. training provider's premises
- Via video conferencing

The venue should be a quiet room, free from distraction and external influence.

Video conferencing can be used to conduct the presentation with questioning but the EPAO must have processes in place to verify the identity of the apprentice and ensure the apprentice is not being aided.

The independent assessor will assess all components of this assessment method holistically.

## Question and resource development

EPAOs will create and set open questions to assess KSBs mapped to this assessment method. Each EPAO must develop a question bank of sufficient size to prevent predictability and review them regularly (and at least once a year) to ensure the questions they contain are fit for purpose. Independent assessors must use the question bank as a source for questioning and are expected to use their professional judgement to tailor those questions appropriately. Independent assessors are responsible for generating suitable follow-up questions in line with the EPAO's training and standardisation process. The questions relating to underpinning KSBs must be varied yet allow assessment of the relevant KSBs.

It is recommended that this be done in consultation with employers. EPAOs should put in place measures and procedures to maintain the security and confidentiality of their questions if employers are consulted.

EPAOs must ensure that apprentices have a different set of questions in the case of re-sits/re-takes.

EPAOs will produce the following material to support this assessment method:

- independent assessor training materials
- assessment specifications
- grading guidance
- question bank
- assessment recording documentation
- examples of projects

## Reasonable adjustments

The EPAO must have in place clear and fair arrangements for making reasonable adjustments to the assessment methods for the EPA for this apprenticeship standard. This should include how an apprentice qualifies for reasonable adjustment and what reasonable adjustments will be made. The adjustments must maintain the validity, reliability and integrity of the assessment methods outlined in this EPA plan.

## Weighting of assessment methods

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

## Grading descriptors

### Assessment method 1: Professional discussion underpinned by a portfolio of evidence

KSBs	Fail	Pass (all of the pass criteria)	Distinction (all of the pass criteria and all of the distinction criteria)
<p><b>K1 K2</b> <b>K3 K5</b> <b>K7 K9</b> <b>K11 K12</b></p> <p><b>S1 S2</b> <b>S3 S4</b> <b>S6 S7ii</b> <b>S8 S10</b> <b>S12 S13</b> <b>S14ii</b> <b>S15</b></p> <p><b>B1 B2</b> <b>B3 B5</b> <b>B8</b></p>	Does not meet the pass criteria	<p><b>K1 S1 B8</b> Describes people policies, processes and approaches they have designed and/or implemented, explaining how they are related to the employee lifecycle and culture in their organisation as well as relevant regulation and law and evaluating how they have created value for the organisation and its people.</p> <p><b>K2 S2</b> Justifies their use of organisational culture, theories, concepts and models of human behaviour when identifying and recognising the interventions needed in their organisation to create the desired culture and behaviours.</p> <p><b>K3 S3</b> Justifies the process taken when they created and managed budgets and strategy, making commercial decisions where they needed to balance competing demands and assess financial and organisational data.</p> <p><b>S4</b> Analyses their contribution to their organisation's people strategy, evidencing how this aligns to the wider organisational strategy and takes into account the wider business context.</p> <p><b>K5 S6</b> Identifies how technology is used to support people practice in their organisation, including social media, identifying benefits and risks and evaluating impact on ways of working.</p>	<p><b>K1 S1</b> Evaluates how their own organisation provides people practices across a range of specialisms and how they integrate these to create a holistic people offering.</p> <p><b>S4</b> Evaluates and critically analyses their own organisation's strategy and how external influences impact on their organisation's performance and potential future trends in their sector and beyond.</p>



	<p>K7 S8 Justifies the approach taken to developing and implementing a people plan/integrated people practice with reference to the elements that contribute to strategic workforce planning.</p> <p>K9 S10 Details how they implemented a programme or initiative involving coaching and mentoring, evaluating the impact on colleagues and the organisation.</p> <p>K12 S12 B3 Evaluates how their use of worker voice tools and associated outputs enables people to have a meaningful voice and feel valued and explains why this is important.</p> <p>S14ii B1 B2 Justifies their use of negotiating and influencing techniques in the management of multiple stakeholders to build trust and enhance their organisation's brand reputation, challenging constructively when necessary.</p> <p>K11 S7ii S13 Evaluates a complex change management programme they have implemented, justifying the tools and project methodologies they have used to deliver outcomes and manage risks.</p> <p>S15 Presents complex information clearly and concisely, adopting channels tailored to segmented stakeholder groups including across organisational boundaries and cultures.</p>	<p>K7 S8 Demonstrates how their approach in developing and implementing a people plan makes a positive contribution to wider workforce planning.</p> <p>S10 Evaluates and critically analyses the organisation's approach to coaching and mentoring.</p>
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		B5 Demonstrates evidence of a commitment to CPD and that incorporates sharing insights, using a reflective mind-set to support their personal development.	
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In addition, those apprentices selecting the Organisational Design option (OD) must meet the following:			
	Fail	Pass (all of the following)	Distinction (all of the following)
K13 K14 K15 K16 S16 S17 S18 S19	Does not meet the pass criteria	<p>K13 K15 S16 S18 Critically evaluates how and why they chose a particular organisational development and design model or theory over others when implementing interventions and analyses the considerations that need to be taken into account to ensure cultural development.</p> <p>K14 S17 Justifies how they select, evaluate and apply an organisational design model or theory appropriate to their organisation.</p> <p>K16 S19 Evaluates how they have used a systems thinking approach to organisational development and its impact.</p>	K13 S16 Leads the implementation of different organisational development models and analyses how that impacted on the culture of the organisation.

In addition, those apprentices selecting the Learning and Development option (L&D) must meet the following:			
	Fail	Pass (all of the following)	Distinction (all of the following)
K17 K18 K19 K20	Does not meet the pass criteria	K17 S20 Critically evaluates an intervention they have implemented that helped embed the value of learning in the organisation and promote a coaching and mentoring culture.	

S20 S21 S22 S23		<p>K18 S21 Critically analyses the effectiveness of their use of new/updated principles for adult learning/motivation in changing an existing programme or implementing a new programme, and integrating these into their organisation's learning approach</p> <p>K19 S23 Justifies how they create a successful organisational learning strategy through their selection and application of design principles.</p> <p>K20 S22 Critically analyses when they have used a complex facilitation technique giving the rationale for using that technique over others.</p>	<p>K19 S23 Critically evaluates how they implement organisational learning principles to meet the future capability needs of the organisation.</p> <p>K20 S22 Evaluates complex facilitation techniques and details the considerations that need to be taken into account when employing these techniques.</p>
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In addition, those apprentices selecting the Human Resources option (HR) must meet the following:			
	Fail	Pass (all of the following)	Distinction (all of the following)
K21 K22 K23 K24 S24 S25 S26 S27	Does not meet the pass criteria	<p>K21 S24 Critically evaluates when they have selected and applied a well-being and/or engagement initiative, giving the rationale for their decisions.</p> <p>K22 S25 Critically evaluates a reward and/or benefit solution/approach within their organisation, explaining why the approach was taken, how it was implemented and how it meets the organisation's current and future needs.</p>	<p>S24 Critically evaluates the strategies they used to integrate employee well-being and engagement.</p>

		<p>K23 S26 Critically evaluates when they have recognised, interpreted and applied both specific legislation and current case law and the impact of this on the organisation and HR strategy.</p> <p>K24 S27 Critically evaluates the selection and application of a performance management process in their organisation and how this process aligns with organisation strategy and plans. Utilises this data to drive improvement.</p>	<p>K23 S26 Evaluates how they assess the organisation impact of employment legal decisions in shaping employee relations strategy, policy and practice.</p>
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## Assessment method 2: Project proposal, presentation and questioning

KSBs	Fail	Pass (all of the pass criteria)	Distinction (all of the pass criteria and all of the distinction criteria)
<p><b>K4 K6</b> <b>K8 K10</b></p> <p><b>S5 S7i</b> <b>S9 S11</b> <b>S14i</b></p> <p><b>B4 B6</b> <b>B7</b></p>	Does not meet the pass criteria	<p>K4 S5 B7 Synthesises qualitative and quantitative data they identified and gathered, balanced with other relevant metrics, in order to reach evidence based, sustainable recommendations that demonstrate added value.</p> <p>K6 S7i Justifies the approach taken when articulating the need for change and questioning accepted practices, drawing on relevant change methodologies, tools and the psychology and impact of change when communicating their recommendations.</p>	<p>K4 S5 Critically evaluates analytical tools used to create value for the organisation.</p> <p>K6 S7i Evaluates existing organisational practices and the long-term impact of change on the workforce to create value for the organisation.</p>

		<p>K8 S9 B4 Explains how they ensure people and policy practices are inclusive and how they work across organisational and cultural boundaries, evaluating the effect on individuals, groups and the organisation.</p> <p>K10 S11 B6 Justifies their selection and application of consulting processes, styles and diagnostic tools, explaining how they identify themes and connections to gain insight into wider issues.</p> <p>S14i Justifies their approach to gaining support for their proposal from senior leaders/board members and explains how this helps position the people strategy at the heart of the organisation.</p>	<p>S14i Critically reflects on the range of influencing styles and strategies to secure senior leader / board commitment.</p>
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## Overall EPA grading

All EPA methods must be passed for the EPA to be passed overall.

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

Performance in the EPA will determine the apprenticeship grade of fail, pass or distinction.

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

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

In order to gain an overall EPA 'pass', apprentices must achieve a pass in both the assessment methods.

In order to achieve an overall EPA distinction, apprentices must achieve a distinction in both assessment methods.

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

Assessment method 1 Professional discussion underpinned by a portfolio of evidence	Assessment method 2 Project proposal, presentation and questioning	Overall grading
Fail	Any grade	Fail
Any grade	Fail	Fail
Pass	Pass	Pass
Distinction	Pass	Pass
Pass	Distinction	Pass
Distinction	Distinction	Distinction

Any grade = fail, pass, or distinction

## Re-sits and re-takes

Apprentices who fail one or more assessment method/s will be offered the opportunity to take a re-sit or a re-take at the employer's discretion. The apprentice's employer will need to agree that either a re-sit or re-take is an appropriate course of action.

A re-sit does not require further learning, whereas a re-take does.

Apprentices should have a supportive action plan to prepare for a re-sit or a re-take.

If the apprentice fails the project proposal assessment method, they will be required to amend the project proposal and presentation in line with the independent assessor's feedback. The apprentice will be given 3 weeks to rework and submit the amended project proposal and presentation. The independent assessor will have 2 weeks to review the project proposal and presentation and the apprentice will have 5 days' notice of the presentation date.

The timescale for a re-sit/re-take is agreed between the employer and EPAO. 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.

All assessment methods must be taken within a 3-month period, otherwise the entire EPA will need to be re-sat/re-taken.

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

Where any assessment method has to be re-sat or re-taken, the apprentice will be awarded a maximum EPA grade of distinction.

## Roles and responsibilities

Role	Responsibility
Apprentice	<p>As a minimum, apprentices should:</p> <ul style="list-style-type: none"> <li>• participate in and complete on-programme training to meet the KSBs as outlined in the occupational standard for a minimum of 12 months</li> <li>• undertake 20% off-the-job training as arranged by the employer and EPAO</li> <li>• understand the purpose and importance of EPA</li> <li>• undertake the EPA including meeting all gateway requirements</li> </ul>
Employer	<p>As a minimum, employers should:</p> <ul style="list-style-type: none"> <li>• select the EPAO and training provider</li> <li>• work with the training provider (where applicable) to support the apprentice in the workplace and to provide the opportunities for the apprentice to develop the KSBs</li> <li>• arrange and support a minimum of 20% off-the-job training to be undertaken by the apprentice</li> <li>• decide when the apprentice is working at or above the occupational standard and so is ready for EPA</li> <li>• ensure that all supporting evidence required at the gateway is submitted in accordance with this EPA plan</li> <li>• remain independent from the delivery of the EPA</li> <li>• confirm arrangements with the EPAO for the EPA (who, when, where) in a timely manner (including providing access to any employer-specific documentation as required, for example company policies)</li> <li>• ensure that the EPA is scheduled with the EPAO for a date and time which allow appropriate opportunity for the KSBs to be met</li> <li>• ensure the apprentice is well prepared for the EPA</li> <li>• ensure the apprentice is given sufficient time away from regular duties to prepare for and complete all post-gateway elements of the EPA, and that any required supervision during this time (as stated within this EPA plan) is in place</li> </ul>

	<ul style="list-style-type: none"> <li>• where the apprentice is assessed in the workplace, ensure that the apprentice has access to the resources used on a daily basis</li> <li>• pass the certificate to the apprentice</li> </ul>
EPAO	<p>As a minimum, EPAOs should:</p> <ul style="list-style-type: none"> <li>• conform to the requirements of this EPA plan and deliver its requirements in a timely manner</li> <li>• conform to the requirements of the Register of End-Point Assessment Organisations (RoEPAO)</li> <li>• conform to the requirements of the external quality assurance provider (EQAP) for this apprenticeship standard</li> <li>• understand the occupational standard</li> <li>• make all necessary contractual arrangements, including agreeing the price of the EPA</li> <li>• develop and produce assessment materials including specifications and marking materials (for example mark schemes, practice materials, training material)</li> <li>• appoint suitably qualified and competent independent assessors</li> <li>• appoint administrators (and invigilators where required) to administer the EPA as appropriate</li> <li>• provide training for independent assessors in terms of good assessment practice, operating the assessment tools and grading</li> <li>• provide adequate information, advice and guidance documentation to enable apprentices, employers and training providers to prepare for the EPA</li> <li>• arrange for the EPA to take place, in consultation with the employer</li> <li>• where the apprentice is not assessed in the workplace, ensure that the apprentice has access to the required resources and liaise with the employer to agree this if necessary</li> <li>• develop and provide appropriate assessment recording documentation to ensure a clear and auditable process is in place for providing assessment decisions and feedback to all relevant stakeholders</li> <li>• have no direct connection with the apprentice, their employer or training provider. In all instances, including when the EPAO is the training provider (i.e. HEI), there must be no conflict of interest</li> <li>• have policies and procedures for internal quality assurance (IQA), and maintain records of regular and</li> </ul>



	<p>robust IQA activity and moderation for external quality assurance (EQA) purposes</p> <ul style="list-style-type: none"> <li>• deliver induction training for independent assessors, and for invigilators and/or markers (where used)</li> <li>• undertake standardisation activity on this apprenticeship standard for all independent assessors before they conduct an EPA for the first time, if the EPA is updated and periodically as appropriate (a minimum of annually)</li> <li>• verify the identity of the apprentice being assessed</li> <li>• use language in the development and delivery of the EPA that is appropriate to the level of the occupational standard</li> <li>• provide details of the independent assessor's name and contact details to the employer</li> <li>• have and apply appropriately an EPA appeals process</li> <li>• request certification via the Apprenticeship Service upon successful achievement of the EPA</li> </ul>
Independent assessor	<p>As a minimum, an independent assessor should:</p> <ul style="list-style-type: none"> <li>• have the competence to assess the apprentice at this level and hold any required qualifications and experience in line with the requirements of the independent assessor as detailed in the IQA section of this EPA plan</li> <li>• understand the occupational standard and the requirements of this EPA</li> <li>• have, maintain and be able to evidence up-to-date knowledge and expertise of the subject matter</li> <li>• deliver the end-point assessment in-line with the EPA plan</li> <li>• comply with the IQA requirements of the EPAO</li> <li>• have no direct connection or conflict of interest with the apprentice, their employer or training provider; in all instances, including when the EPAO is the training provider (i.e. HEI)</li> <li>• attend induction training</li> <li>• attend standardisation events when they begin working for the EPAO, before they conduct an EPA for the first time and a minimum of annually on this apprenticeship standard</li> <li>• assess each assessment method, as determined by the EPA plan, and without extending the EPA unnecessarily</li> <li>• assess against the KSBs assigned to each assessment method, as shown in the mapping of</li> </ul>

	<p>assessment methods and as determined by the EPAO, and without extending the EPA unnecessarily</p> <ul style="list-style-type: none"> <li>• make all grading decisions</li> <li>• record and report all assessment outcome decisions, for each apprentice, following instructions and using assessment recording documentation provided by the EPAO, in a timely manner</li> <li>• use language in the development and delivery of the EPA that is appropriate to the level of the occupational standard</li> <li>• mark open (constructed) test answers accurately according to the EPAO's mark scheme and procedures</li> </ul>
Training provider	<p>As a minimum, the training provider should:</p> <ul style="list-style-type: none"> <li>• work with the employer and support the apprentice during the off-the-job training to provide the opportunities to develop the knowledge, skills and behaviours as listed in the occupational standard</li> <li>• conduct training covering any knowledge, skill or behaviour requirement agreed as part of the Commitment Statement (often known as the Individual Learning Plan).</li> <li>• monitor the apprentice's progress during any training provider led on-programme learning</li> <li>• advise the employer, upon request, on the apprentice's readiness for EPA</li> <li>• remain independent from delivery of the EPA. Where the training provider is the EPA (i.e. a HEI) there must be procedures in place to mitigate against any conflict of interest</li> </ul>

## Internal Quality Assurance (IQA)

Internal quality assurance refers to the strategies, policies and procedures that EPAOs must have in place to ensure valid, consistent and reliable end-point assessment decisions. EPAOs for this EPA must adhere to all requirements within the Roles and Responsibilities section and:

- have effective and rigorous quality assurance systems and procedures that ensure fair, reliable and consistent assessment across employers, places, times and independent assessors
- appoint independent assessors who have knowledge of the following occupational areas: Experience of working in at least one of the three specialist areas as set out in the senior people professional apprenticeship specification. (An independent assessor may deliver EPA for apprentices in either their own specialist area or any other specialist area).
- appoint independent assessors who have recent relevant experience of the occupation/sector at least the same level as the apprentice gained in the last five years or significant experience of the occupation/sector.
- appoint independent assessors who are members of relevant professional bodies.
- appoint independent assessors who are competent to deliver the end-point assessment.
- provide training for independent assessors in terms of good assessment practice, operating the assessment tools and grading
- operate induction training and standardisation events for independent assessors when they begin working for the EPAO on this standard and before they deliver an updated assessment method for the first time
- ensure independent assessors attend standardisation events on an ongoing basis and at least once per year or if the EPA is updated
- conduct appeals where required, according to the EPAO's appeals procedure, reviewing and making final decisions on assessment decisions and grades

## Value for money

Affordability of the EPA will be aided by using at least some of the following practices:

- Use of technology – for example, the use of video conferencing.
- Location – for example use of employer premises
- Possibility of scheduling multiple assessment methods on the same day

## Professional body recognition

This apprenticeship is designed to prepare successful apprentices to meet the requirements for registration as a Chartered Member with CIPD.

# Mapping of knowledge, skills and behaviours (KSBs)

## Assessment method 1: Professional discussion underpinned by portfolio of evidence

Knowledge
K1: The employee lifecycle and the range of people practices that underpin it, including relevant regulation, compliance, governance and relevant law and how to develop policy in line with this.
K2: Organisational culture, theories and concepts, organisational behaviour, models and theories of human behaviour, ethics, values and beliefs.
K3: Business acumen, including organisational strategy creation, strategic planning tools (including business cases) and trends in the wider business context as well as drivers of organisational performance and methods of measuring organisational data. Knowledge of financial and commercial information and value for money principles.
K5: Ways in which technology supports the delivery of people practice and enables collaboration and the risks, opportunities and impact of technology on ways of working, both in the wider organisation and in the people profession, including how social media fits with the organisational communication strategy.
K7: The elements that make up strategic workforce planning, such as talent management, succession planning and resourcing.
K9: Strategies, tools and techniques to build management, coaching and mentoring capability across the organisation.
K11: How projects fit as part of wider programme management and how to use project management methodologies in order to deliver a project.
K12: Worker voice tools and approaches and how these potentially impact on worker engagement and performance
K13: (OD) How to critically evaluate and apply models and measures of culture and behaviour in organisational development.
K14: (OD) Organisational design theories, principles, models, structures, good work design and job design.
K15: (OD) Organisation development theories, principles, models, tools, interventions and scenario planning.
K16: (OD) Essential concepts of systems thinking.
K17: (LD) How to critically evaluate and apply theories, concepts and the value of learning, coaching and mentoring cultures.
K18: (LD) The psychology of learning as well as current and future trends in adult learning and motivation and how to integrate into an organisations learning approach.
K19: (LD) Learning design principles and methods aligned to learning strategy.
K20: (LD) Complex facilitation techniques and when to use them

K21: (HR) Strategies and drivers of employee well-being and engagement and how to integrate into wider organisation approaches
K22: (HR) How to create remuneration and benefit approaches that are aligned to current and future organisation needs and market conditions such as equal pay.
K23: (HR) Employment law, (including associated case law), different theories and perspectives on employee relations and employee body relationships, and the implications on people policies and practices.
K24: (HR) The impact of performance management approaches and how performance management data can be used to drive improvement.

Skills
S1: Design and implement a range of people policies, processes, approaches and practices in line with the organisations strategic plan, culture and values.
S2: Identify and recognise the interventions an organisation needs to create the desired culture and behaviours.
S3: Create and manage relevant budgets (for example HR and projects) and make balanced commercial decisions, recording them appropriately.
S4: Design and contribute to the formulation and shaping of the people strategy and ensure alignment to organisational strategy.
S6: Evaluate, identify and where appropriate select a technological/digital solution that will enhance current ways of working.
S7ii: Implementing change programmes where required (including diagnostics, options and methodologies).
S8: Develop and implement people plans and integrated people practices in line with organisational and people strategy.
S10: Develop the management, coaching and mentoring capabilities utilising appropriate tools and methodologies.
S12: Align and evaluate worker voice tools and approaches and drive forward the outputs.
S13: Select appropriate project management methodologies and resources in order to plan, lead and deliver complex projects (often as part of wider programmes) including the management of risk.
S14ii: Manage complex relationships across multiple and diverse stakeholders, building trust and rapport with the ability to positively challenge. Lead beyond area of control/authority and influence, negotiate and use advocacy skills to build reputation and effective collaborations.
S15: Present complex information (which may include difficult messages) selecting channels that are tailored to the audience and can be clearly understood, including across the organisational boundaries, cultures and other disciplines.
S16: (OD) Select and apply organisation development models and measures and lead the implementation of different approaches to enable cultural development.
S17: (OD) Select, evaluate and apply appropriate design theories, principles, models, structures, for good work design and job design.

S18: (OD) Select, evaluate and apply appropriate organisation development theories, principles, models, tools (including scenario planning), to design and implement interventions.
S19: (OD) Apply appropriate systems thinking approaches to organisational development and design.
S20: (LD) Select, evaluate and apply appropriate theories and concepts to embed the value of learning, and to create a coaching and mentoring culture.
S21: (LD) Integrate appropriate current and future trends in adult learning and motivation into an organisation's learning approach, evaluating the effectiveness of the approach.
S22: (LD) Select and apply appropriate complex facilitation techniques to achieve the desired outcome.
S23: (LD) Select, evaluate and apply appropriate design principles and methods aligned to learning strategy.
S24: (HR) Select, evaluate and apply appropriate strategies to integrate employee well-being and engagement into wider organisation approaches.
S25: (HR) Select, evaluate and apply appropriate remuneration and benefit approaches which are aligned to current and future organisation needs and market conditions.
S26: (HR) Recognise, interpret and apply employment law, (including associated case law), and the implications on people policies and practices, ensuring the relationship between an organisation and its people is managed through transparent practices and relevant law whilst taking account of different theories and perspectives on employee relations.
S27: (HR) Select, evaluate and apply appropriate performance management approaches and use relevant data to drive improvement.

Behaviours
B1: Role models ethical behaviour and practices and challenge decisions and actions that are not ethical.
B2: Demonstrates professional courage and influence by challenging constructively and confidently in the face of opposition and tailoring influencing techniques to gain buy-in.
B3: Makes a visible commitment to valuing people; demonstrate compassion and fairness and enable people to have a meaningful voice in decisions that impact them.
B5: Actively searches and creates opportunities to learn, sharing insights and future trends with others (internally and externally). Brings a reflective mind-set to experiences and learning to innovate and continuously improve performance.
B8: Applies a strategic and commercial mind-set to drive and enable change and create value for the organisation and its people.

## Assessment method 2: Project proposal, presentation and questioning

Knowledge
K4: Methods of measuring value and impact and types of analytical tools relating to creating value for an organisation as well as methods of evaluating opportunity costs including qualitative and quantitative metrics.
K6: Change methodology and tools and the psychology and impact of change on the workforce and the organisation.
K8: How to integrate diversity and inclusion into wider organisational approaches.
K10: A range of consulting processes and styles as well as diagnostic tools appropriate to the role.

Skills
S5: Devise, analyse, interpret and offer insight into data and metrics and the insights they provide to the industry and organisation for the purpose of creating value.
S7i: Question accepted practices and articulate the need for change.
S9: Ensure that people policies and practices are inclusive, recognising the impact on individuals and groups and supporting diversity.
S11: Select and apply a range of consulting processes, styles and diagnostic tools appropriate to the role.
S14i: Influence senior leaders in order to position the people strategy at the heart of the business and ensure it is considered when decisions are taken across the organisation.

Behaviours
B4: Role models collaborative and inclusive working across organisational and cultural boundaries, driving diversity to achieve positive outcomes.
B6: Assimilates evidence and ideas from multiple sources to identify themes and connections and gain insights on whole issues and their wider implications.
B7: Takes an adaptable, evidence based approach to decision making in the context of specific situations or environments.