

End-point assessment plan for Corporate Responsibility & Sustainability Practitioner apprenticeship standard

Apprenticeship standard reference number	Apprenticeship standard level	Integrated end-point assessment
ST0934	4	No

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Introduction and overview

This document sets out the requirements for end-point assessment (EPA) for the Corporate Responsibility & Sustainability Practitioner (CR&S) apprenticeship standard. It explains how EPA for this apprenticeship must operate.

This document provides the EPA design requirements for end-point assessment organisations (EPAOs) for this apprenticeship standard. It will also be useful for apprentices undertaking this apprenticeship, their employers and training providers.

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).

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

Before starting EPA, an apprentice must meet the gateway requirements. For this apprenticeship they are:

- the employer must be content that the apprentice is working at or above the occupational standard
- apprentices must have achieved English and mathematics at Level 2¹

The EPAO must confirm that all required gateway evidence has been provided and accepted as meeting the gateway requirements. The EPAO is responsible for confirming gateway eligibility. Once this has been confirmed, the EPA period starts.

This EPA should then be completed within an EPA period lasting typically for 6 months. This EPA consists of 2 discrete assessment methods. It will be possible to achieve the following grades in each end-point assessment method:

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

- Fail
- Pass
- Distinction

Assessment method 2: Work-based project followed by a report and a presentation with questions and answers

- Fail
- Pass
- Distinction

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

- Fail
- Pass
- Distinction

¹ 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.

EPA summary table

On-programme (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 a portfolio of evidence.</p>
End-point assessment gateway	<ul style="list-style-type: none"> • Employer is satisfied the apprentice is consistently working at, or above, the level of the occupational standard. • English and mathematics Level 2 <p>Apprentices must submit:</p> <ul style="list-style-type: none"> • A portfolio of evidence • The project title, brief summary and terms of reference should be agreed between the employer, the apprentice and the EPAO at the gateway.
End-point assessment (which will typically take 6 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"> • Fail • Pass • Distinction <p>Assessment method 2: Work-based project followed by a report and a presentation with questions and answers</p> <p>With the following grades:</p> <ul style="list-style-type: none"> • Fail • Pass • Distinction <p>Performance in these assessment methods will determine the overall apprenticeship standard grade of:</p> <ul style="list-style-type: none"> • Fail • Pass • Distinction
Professional recognition	<p>Aligns with recognition by:</p> <p>N/A</p>

Length of end-point assessment period

The EPA will be completed within an EPA period lasting typically of 6 months, starting when the EPAO has confirmed that all gateway requirements have been met.

Order of assessment methods

The assessment methods can be delivered in any order and one assessment method does not need to be passed before another is started.

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.

The EPAO determines when all gateway requirements have been met, and the EPA period will only start once the EPAO has confirmed this.

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

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. A British Sign Language qualification is an alternative to English qualifications for those for whom this is their primary language.

For the professional discussion, the apprentice will be required to submit their portfolio of evidence in line with the following 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 16 discrete pieces of evidence
- evidence must be mapped 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, records
 - witness statements

- annotated photographs
- video clips (maximum total duration 15 minutes); the apprentice must be in view and identifiable

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 work-based project followed by a report and a presentation with questions and answers, the project title, brief summary and terms of reference requirements are as follows:

- The apprentice will scope out and provide a brief summary of what the project will cover and will submit a terms of reference at the gateway of what will be undertaken. This should demonstrate that the work-based project and report will provide sufficient opportunity for the apprentice to meet the assessment criteria. The terms of reference is not an assessed component of the project and will typically be no longer than 500 words.
- The brief summary of what the project will cover plus the terms of reference need to include a summary of the project plan, research requirements, an overview of how the project will be planned including timeframes and the date that the work based project report has to be submitted to the independent assessor taking into account the deadlines stipulated within this end-point assessment plan.

The project title, brief summary and terms of reference should be agreed between the employer, the apprentice and the EPAO at the gateway. The EPAO should sign-off the project to confirm its suitability prior to the project commencing. In the event that the EPAO determines the apprentice's brief summary and terms of reference do not represent an acceptable project, the apprentice may re-draft their proposal for the EPAO to consider. The EPA period will not start until this has been signed off.

Assessment methods

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

This assessment method has 1 component.

Overview

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 rationale for this assessment method is:

This method suits assessment of KSBs that may not naturally or reliably occur during the project and instead are best evidenced via a discussion (underpinned by the evidence recorded in a portfolio) developed over the on-programme phase.

Delivery

The independent assessors will conduct and assess the professional discussion. Only the independent assessor and the apprentice shall be present. The EPAO must give the apprentice a minimum of two weeks' notice of when the professional discussion will take place. The apprentice may take their portfolio into the professional discussion and refer to it throughout.

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 cover the KSBs assigned to this assessment method. It will involve questions that will focus on detail. The purpose of the questions will be:

- to assess the KSBs assigned to this assessment method and the apprentice may use their portfolio to support their responses.

The professional discussion must last for 60 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.

The professional discussion will be conducted as set out here:

The professional discussion will be underpinned by the portfolio completed by the apprentice during the on-programme phase of the apprenticeship. This is a two-way discussion, and the independent assessor will seek to gain assurance of the apprentice's competency by questioning. The independent assessor should have at least 5 working days to review the portfolio in advance of the professional discussion. The independent assessor will ask a minimum of 10 questions. Independent assessors must use the question bank as a source for questioning and are expected to use their professional judgment to tailor those questions appropriately. Independent assessors are responsible for generating suitable follow-up questions in line with the EPAOs training and standardisation process. Apprentices will be expected to use examples from their portfolio to support their answers.

The professional discussion must cover the following themes:

- CR&S business structures & opportunities
- CR&S relationships
- CR&S strategy and management
- CR&S principles
- The CR&S learning agenda

It is anticipated that the professional discussion will ordinarily be conducted face to face. Video conferencing can also 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 independent assessor must use the assessment tools and procedures that are set by the EPAO to record the professional discussion. The independent assessor will make all grading decisions.

Venue

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

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

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

Other relevant information

A structured question bank must be developed by EPAOs. The 'question bank' must be of sufficient size to prevent predictability and the EPAO must review 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. It is recommended that EPAOs consult employers on the design of suitable questions held within the bank each time the question bank is reviewed.

EPAOs must ensure that apprentices have a different set of questions in the case of re-sits/re-takes. Independent assessors must be developed and trained by the EPAO in the conduct of professional discussion and reaching consistent judgement.

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

- outline of the assessment method's requirements
- marking materials
- data capture form for evidence and gaps
- bank of questions
- guidance document for employers and apprentices on the process / timescales for the professional discussion as well as a description of the purpose of the professional discussion
- guidance document for independent assessors on how to carry out the assessment
- assessment recording documentation

Marking

The independent assessor will record the apprentice's responses throughout the professional discussion using the assessment tools provided by the EPAO.

Assessment method 2: Work-based project followed by a report and a presentation with questions and answers

This assessment method has 2 components.

Overview

The project report is compiled and delivered after the apprentice has gone through the gateway and completed the work-based project.

The work-based project should be designed to ensure that the apprentice's work meets the needs of the CR&S employer, is relevant to their role and allows the relevant KSBs to be demonstrated for the EPA. Therefore, the project's subject, title and scope will be agreed between the apprentice, the employer and the EPAO at the gateway. The employer will ensure it has real CR&S application and the EPAO will ensure it meets the requirements of the EPA (including suitable coverage of the KSBs assigned to this assessment method). The EPAO should sign-off the project title to confirm its suitability prior to the project commencing. (See the gateway section of this document for the project title, brief summary and terms of reference requirements.)

This assessment method includes two components:

- a project report
- a presentation with question and answer component to ensure the apprentice is assessed against their evidence.

The rationale for this assessment method is:

CR&S Practitioners are required to manage projects that have a significant lifecycle. These projects typically flow from the organisation strategy or may be a new initiative agreed with an external partner organisation. Projects typically involve designing a CR&S initiative, which means involving multiple stakeholders, monitoring progress, and reporting. A project is therefore a realistic and appropriate test of knowledge, skills and behaviours.

Component 1 - Project report

Delivery

Apprentices will undertake a project in the form of conducting research, planning and delivering the work, and writing a project report. They will then present their findings in the form of a report and presentation. The report is paper based or electronic.

The project starts after the apprentice has gone through the gateway. The apprentice must be given 16 weeks to complete and submit the work-based project report following the EPAO's approval of the report scope and title. Employers must allow apprentices up to 30 working days of time (within this sixteen-week period) to do so.

The employer will ensure the apprentice has sufficient time and the necessary resources, within this period, to plan and undertake the project.

Input at this stage from the employer and EPAO should be limited to guidance in terms of the project topic, scope, and recommended reading. All work must be the apprentice's work alone and they must receive no assistance other than that described above.

Once the project report is completed, the apprentice will submit to the EPAO their project report.

The project report will have a word limit of 5,000 words, with a tolerance of +/-10% (at the discretion of the apprentice). Appendices, references, diagrams etc. will not be included in this total, but these must not exceed 1,500 words.

The apprentice will be required to document their assumptions and to highlight the consequences of those assumptions, enabling them to demonstrate their CR&S knowledge and understanding, limitations of the project and data analysis, and the application of their thinking and problem-solving skills. The project report must map, in a separate appendix, how it evidences the relevant KSBs for this assessment method (this appendix is not included in any word count).

Following submission of the project report, the EPAO will inform the candidate of the date for the formal presentation with questions and answers. The independent assessor should have at least 5 working days to review the project report in advance of the presentation. The presentation with questioning will take place post project report submission with the EPAO providing at least two (2) weeks' notice.

The project will typically be based on any one of the following, though any project with a focus to increasing CR&S activity within an organisation may be considered:

- Identify a specific problem within a workplace that is a barrier to embedding CR&S initiatives, and undertake a plan to overcome the barrier to influence the change
- Review current CR&S practice to increase performance within a team/workplace/organisation
- Design a new CR&S campaign that meets the apprentice's own organisation's objectives.

An illustrative project is, for instance, where a team's performance is driven by profitability, without sufficient regard to impact on climate change / the environment. Another example is a team that is not meeting its target for sustainable practices such as recycling or carbon emissions, a partner organisation campaign of mutual interest and benefit such as volunteering.

Due to the varying nature of the CR&S occupation, the project scope is designed to allow flexibility for both projects that are internal and external to the apprentice's own organisation, i.e. the project may involve external partners, internal teams, or both.

All CR&S projects are likely to have budget management implications of some kind. These could be the cost of staffing when adapting to a new way of working, the cost of staff time, or the purchasing cost of investment. As part of the project, the apprentice must consider and manage the financial implications. However, the project does not necessarily need to include a discrete financial budget, as CR&S Practitioners also work in environments where there is no capital spend.

Employers should support apprentices by ensuring the project offers the required amount of opportunity needed to demonstrate competency. Where, in particular, projects involve external stakeholders, employers should be assured the projects will go ahead. The EPAO should sign off the project's title and scope to confirm its suitability at the gateway.

As a minimum, the project report must include:

- an introduction
- the scope of the project (including key performance indicators and financial implications)
- a project plan
- research and findings
- project outcomes
- how the outcomes were achieved
- recommendations and conclusions

When the project report is submitted, the employer and the apprentice should verify that the submitted work is that of the apprentice and has been completed within 30 working days.

Marking

The independent assessor will review and mark the project report in a timely manner, as determined by the EPAO, and without extending the EPA unnecessarily. Similarly, all quality control processes will also be conducted in a timely manner, as determined by the EPAO.

Supporting material

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

- marking materials
- feedback template to provide feedback to the apprentice
- a guidance document for employers and apprentices on how the assessment will take place, including timescales
- independent assessor training materials
- grading guidance
- outline of the assessment method's requirements

Assessment method 2 component 2: Presentation with questions and answers

Overview

Apprentices will prepare and deliver a presentation that appropriately covers the KSBs assigned to this method of assessment.

The presentation will be based on the project report and will cover:

- a summary of the problem, recurring issue or idea/opportunity
- methodology - why the apprentice adopted their chosen approach
- high level findings
- recommendations
- a summary of the project's conclusion and plans for evaluation.

The presentation must be completed after the gateway and once the project report has been completed and submitted. It will be presented to an independent assessor, either face-to-face or via online video conferencing. Video conferencing can be used to conduct the presentation with questions and answers, but the EPAO must have processes in place to verify the identity of the apprentice and ensure the apprentice is not being aided in some way, e.g. 360 degree camera.

After the project report has been submitted, the EPAO must arrange a date for the presentation, for which the apprentice will be given 2 weeks' notice to prepare. The apprentice is not required to submit any material ahead of the date of the presentation to the independent assessor but must notify the EPAO of any presentation requirements when they are advised of the date of the presentation.

The rationale for this assessment method is:

CR&S Practitioners often have to communicate their findings to others. Therefore, the presentation of the project findings replicates closely what is typically expected in the workplace, for instance when reporting to senior leadership or when motivating teams.

Delivery

The presentation with questions and answers can be just verbal (i.e. no visuals) or with paper-based or/and electronic visuals.

The presentation with questions and answers component of the assessment method will last for a total of 45 minutes, broken down as follows:

The presentation will typically last for 20 minutes. The independent assessor has the discretion to increase the time of the presentation by up to 10% to allow the apprentice to complete their last point. Ordinarily, the independent assessor will remain silent throughout the presentation.

After the presentation, the independent assessor will typically have 25 minutes of questioning during which they must ask a minimum of 6 questions. 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 project report. They will do this ahead of the presentation and having read the project report. The questions are intended to confirm the independent assessor's understanding of the project report and presentation and how it demonstrates the relevant KSBs. The purpose of these questions is to support the apprentice to constructively demonstrate and discuss their project and their competence in terms of the

knowledge, skills and behaviours and grading criteria assigned to assessment method two. Any number of follow-up questions are permitted within the time available.

The independent assessor will make all grading decisions and will grade the project report and presentation with questions and answers holistically.

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

- presentation software previously notified to the EPAO
- lip chart
- laptop/computer
- notes
- interactive boards
- any other requirements as previously noted to the EPAO

Venue

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 video conferencing platform
- other suitable venue selected by the EPAO (for example a training provider)

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

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

Only the independent assessor will observe the presentation. A representative from the EPAO may be present when necessary for moderation purposes.

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.

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

Supporting material

EPAOs will produce the following materials to ensure that this assessment method is marked consistently and accurately:

- outline of the assessment method's requirements
- marking materials
- a bank of questions
- grading guidance
- independent assessor training materials
- guidance document for employers and apprentices on the process / timescales for the work-based project, with a report and presentation as well as a description of the purpose
- guidance document for independent assessors on how to carry out the assessment

Reasonable adjustments

The EPAO must have in place clear and fair arrangements for making reasonable adjustments 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 assessment plan.

Weighting of assessment methods

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

Overall EPA grading

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

To achieve a pass overall, the apprentice must achieve a pass in both assessment methods by achieving all pass criteria. To achieve a distinction overall, the apprentice must achieve a distinction in both assessment methods by achieving all pass criteria and the stated number of distinction criteria.

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 – Work based project followed by a report and a presentation with questions and answers	Overall grading
Fail	Any grade	Fail
Any grade	Fail	Fail
Pass	Pass	Pass
Pass	Distinction	Pass
Distinction	Pass	Pass
Distinction	Distinction	Distinction

Any grade = fail, pass, or distinction

Re-sits and re-takes

Apprentices who fail one or more assessment method will be offered the opportunity to take a re-sit or a re-take. A re-sit does not require further learning, whereas a re-take does.

Apprentices should have a supportive action plan to prepare for the re-sit or a re-take. The apprentice's employer will need to agree that either a re-sit or re-take is an appropriate course of action.

An apprentice who fails an assessment method, and therefore the EPA in the first instance, will be required to re-sit or re-take any failed assessment methods only.

The timescales for a resit/retake is agreed between the employer and EPAO. A resit is typically taken within 2 months of the EPA outcome notification. The timescale for a retake is dependent on how much re-training is required and is typically taken within 3 months of the EPA outcome notification.

All failed assessment methods must be re-sat or re-taken within a six 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 distinction. Where any assessment method has to be re-sat or re-taken, the apprentice will be awarded a maximum EPA grade of pass, unless the EPAO determines there are exceptional circumstances requiring a re-sit or re-take.

Roles and responsibilities

Role	Responsibility
Apprentice	<p>As a minimum, apprentices should:</p> <ul style="list-style-type: none"> • participate in and complete on-programme training to meet the KSBs as outlined in the occupational standard for a minimum of 12 months • undertake 20% off-the-job training as arranged by the employer and EPAO • understand the purpose and importance of EPA • undertake the EPA including meeting all gateway requirements
Employer	<p>As a minimum, employers should:</p> <ul style="list-style-type: none"> • select the EPAO and training provider • 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 • arrange and support a minimum of 20% off-the-job training to be undertaken by the apprentice • decide when the apprentice is working at or above the occupational standard and so is ready for EPA • ensure that all supporting evidence required at the gateway is submitted in accordance with this EPA plan • remain independent from the delivery of the EPA • 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) • ensure that the EPA is scheduled with the EPAO for a date and time which allow appropriate opportunity for the KSBs to be met • ensure the apprentice is well prepared for the EPA • 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

	<ul style="list-style-type: none"> • where the apprentice is assessed in the workplace, ensure that the apprentice has access to the resources used on a daily basis • pass the certificate to the apprentice
EPAO	<p>As a minimum, EPAOs should:</p> <ul style="list-style-type: none"> • conform to the requirements of this EPA plan and deliver its requirements in a timely manner • conform to the requirements of the Register of End-Point Assessment Organisations (RoEPAO) • conform to the requirements of the external quality assurance provider (EQAP) for this apprenticeship standard • understand the occupational standard • make all necessary contractual arrangements, including agreeing the price of the EPA • develop and produce assessment materials including specifications and marking materials (for example mark schemes, practice materials, training material) • appoint suitably qualified and competent independent assessors • appoint administrators (and invigilators where required) to administer the EPA as appropriate • provide training for independent assessors in terms of good assessment practice, operating the assessment tools and grading • provide adequate information, advice and guidance documentation to enable apprentices, employers and training providers to prepare for the EPA • arrange for the EPA to take place, in consultation with the employer • 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 • 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 • 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 • have policies and procedures for internal quality assurance (IQA), and maintain records of regular and robust IQA activity and moderation for external quality assurance (EQA) purposes

	<ul style="list-style-type: none"> • deliver induction training for independent assessors, and for invigilators and/or markers (where used) • 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) • manage invigilation of apprentices in order to maintain security of the assessment in line with the EPAO's malpractice policy • verify the identity of the apprentice being assessed • use language in the development and delivery of the EPA that is appropriate to the level of the occupational standard • provide details of the independent assessor's name and contact details to the employer • have and apply appropriately an EPA appeals process • request certification via the Apprenticeship Service upon successful achievement of the EPA
Independent assessor	<p>As a minimum, independent assessors should:</p> <ul style="list-style-type: none"> • 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 • understand the occupational standard and the requirements of this EPA • have, maintain and be able to evidence up-to-date knowledge and expertise of the subject matter • deliver the end-point assessment in-line with the EPA plan • comply with the IQA requirements of the EPAO • 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) • attend induction training • 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 • assess each assessment method, as determined by the EPA plan, and without extending the EPA unnecessarily • assess against the KSBs assigned to each assessment method, as shown in the mapping of assessment methods and as determined by the EPAO, and without extending the EPA unnecessarily • make all grading decisions • 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

	<ul style="list-style-type: none"> • use language in the development and delivery of the EPA that is appropriate to the level of the occupational standard • mark open (constructed) test answers accurately according to the EPAO's mark scheme and procedures
Training provider	<p>As a minimum, training providers should:</p> <ul style="list-style-type: none"> • 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 • conduct training covering any knowledge, skill or behaviour requirement agreed as part of the Commitment Statement (often known as the Individual Learning Plan). • monitor the apprentice's progress during any training provider led on-programme learning • advise the employer, upon request, on the apprentice's readiness for EPA • 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

Internal quality assurance (IQA)

Internal quality assurance refers to the requirements that EPA organisations must have in place to ensure consistent (reliable) and accurate (valid) assessment decisions. EPA organisations for this EPA must:

- appoint independent assessors who have a working knowledge of all the duties contained in this apprenticeship standard.
- appoint independent assessors who have recent relevant experience of the occupation/sector, at least the same level as the apprentice and gained in the last three years.
- appoint independent assessors who are competent to deliver the end-point assessment and who meet the following minimum requirements:
 - hold or are working towards a recognised assessor qualification
- provide training for independent assessors in terms of good assessment practice, operating the assessment tools and grading
- have robust quality assurance systems and procedures that support fair, reliable and consistent assessment across the organisation and over time
- 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

Value for money

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

- online assessment
- using an employer's premises
- suitable videoconferencing software

Professional body recognition

Professional body recognition is not relevant to this occupational apprenticeship.

Mapping of knowledge, skills and behaviours (KSBs)

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

Knowledge
K4: The types of metrics and insight evidence that help inform CR&S issues.
K5: How the positioning of the CR&S function within organisational and governance structures can impact CR&S performance.
K6: Techniques to identify/evaluate the internal and external range of potential CR&S partners.
K7: Techniques for managing and influencing stakeholder relationships.
K8: Principles of negotiating a CR&S project with an internal and/or external partner.
K11: Principles for developing a strategy that manages the social, environmental and ethical risks and opportunities of an organisation.
K16: Factors that contribute to successful CR&S event management.
K17: The principles of CR&S fundraising.
K18: Quality assurance techniques for monitoring the delivery of CR&S work.
K19: The importance & impact of the sector specific factors (the legislation, guidance and best practice) when developing a CR&S strategy.
K21: Horizon scanning techniques for keeping up to date with the CR&S landscape (including evolving best practice and what other organisations are doing).
K23: The different ways in which people learn and how this links to embedding CR&S ethos.
K24: How responsible corporate approaches bring mutually compatible organisation and societal benefits.
K25: The range of sustainable practices available to any organisation including in-house practices, partner policies, and outputs.
K26: How CR&S delivery is impacted by the environment, social and governance agendas affecting industry.
K27: How CR&S Strategy influences talent management, reputation and branding.

Skills
S4: Utilise strengths of internal organisational structures to help build self-sustaining CR&S populations.
S5: Tailor approach to maintaining new/existing external stakeholder relationships to achieve progress on plans (e.g. objectives, key initiatives and shared interests).
S6: Contribute to the negotiation of external CR&S projects of mutual benefit.
S8: Recommend opportunities for external engagement, articulating the mutual benefits and risks.

S10: Contribute to the drafting of the CR&S strategy.
S14: Deliver CR&S events in accordance with contractual arrangements.
S15: Quality assure own and others work in accordance with organisational requirements
S16: Contribute to reporting externally on CR&S Strategy and delivery in line with industry and legislative requirements.
S18: Research the CR&S landscape, escalating best practice opportunities within own organisation.
S20: Train colleagues in CR&S techniques, tailoring the learning style to the circumstances.
S21: Identify and deliver initiatives that may raise funds for CR&S projects.

Behaviours
B2: Committed to developing self and others in ways that support CR&S engagement.
B6: Stand by difficult CR&S decisions and hold your team/organisation to account.
B7: Ethical and non-judgmental.

Assessment method 2: Work-based project followed by a report and a presentation with questions and answers

Knowledge
K1: Principles of project management and a range of project planning tools.
K2: Principles of change management and culture management.
K3: Potential CR&S data sources including organisational, sectoral and stakeholder.
K9: Different forms of communication (written, verbal, electronic) and how to tailor the solution to the circumstances.
K10: Techniques for reporting on CR&S delivery against objectives.
K12: Techniques that recognise and utilise the comparative strengths and weaknesses across teams and across the organisation.
K13: Techniques to motivate individuals to work together to meet CR&S requirements.
K14: The principles of data management including how to manipulate and store data needed for CR&S projects.
K15: Techniques that compare a range of qualitative and quantitative data on CR&S performance.
K20: The principles of risk management including conducting and reviewing risks affecting a CR&S strategy. (for example, safeguarding risk).
K22: Principles of CR&S related budget management.

Skills
S1: Select and implement project management and planning tools applicable to the type of project/campaign lifecycle.
S2: Assess the effectiveness of change and identify opportunities to improve outcomes, guiding and supporting others to deliver results.
S3: Balance own CR&S workload to prioritise competing demands and achieve key performance indicators.
S7: Adopt a communication method that takes account of the audience and is suitable for the circumstances.
S9: Contribute to written reports on CR&S performance in line with organisational requirements.
S11: Adjust leadership style to achieve results, having regard to the needs of the individual/teams involved.
S12: Select data that is relevant to the CR&S issue being considered.
S13: Analyse data to form evidence-based conclusions on CR&S performance.
S17: Identify own organisations CR&S opportunities and threats. Escalate risks within own organisation when needed.
S19: Apply management techniques needed to deliver CR&S projects within budget.
S22: Identify and apply relevant IT solutions to CR&S issues.

Behaviours
B1: Actively champion the CR&S agenda/ethos.
B3: Works within own level of authority, seeking support when needed.
B4: Takes the lead in helping others to achieve CR&S results. (within limits of own role).
B5: Seeks innovative ways to add value to CR&S issues while remaining objective.

Grading

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

KSBs	Pass – all the following Criteria:	Distinction – pass criteria and all the following:
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<p>K4, K5, K6, K7, K8, K11, K16, K17, K18, K19, K21, K23, K24, K25, K26, K27, S4, S5, S6, S8, S10, S14, S15, S16, S18, S20, S21, B2, B6, B7</p>	<ul style="list-style-type: none"> • Theme - CR&S business structures & opportunities <p>K5 S4</p> <p>Describes how they utilise organisational/governance structures when building a CR&S self-sustaining working practice, providing examples of how these impact on CR&S performance.</p> <p>K21 S18 S8</p> <p>Justifies their selection and use of horizon scanning and research techniques for improving practice within their own organisation and identifying opportunities for external engagement, describing how they balanced risks and benefits.</p> <ul style="list-style-type: none"> • Theme - CR&S relationships <p>K6 K7 S5</p> <p>Explains and justifies the relationship management techniques they use to maintain and influence their network of internal/external stakeholder relationships to progress desired CR&S outcomes.</p> <p>K8 S6 B6</p> <p>Describes a time when they contributed to their own organisation's negotiation of an external project of mutual benefit, evaluating how the techniques used contributed to successful outcomes and the impact of standing by difficult decisions.</p> <p>K16 S14</p> <p>Describes a time when they delivered a CR&S event that involved an external contract, analysing the factors that contributed to its success and how contractual arrangements were met.</p>	<p>K5 S4</p> <p>Evaluates the comparative strengths and weaknesses of the approach to CR&S positioning within the organisational/governance structure in which they work.</p> <p>K6 K7 S5</p> <p>Evaluates the methods they have used to build, influence and manage stakeholder relationships and how they tailored their approach to achieve their objectives</p>
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	<ul style="list-style-type: none"> • Theme - CR&S Strategy and management <p>K4 S16</p> <p>Describes how their own contribution to CR&S external reports on performance has helped their organisation meet its expected industry and legislative reporting requirements, outlining the metrics used to provide insights into performance.</p> <p>K11 K19 K26 S10</p> <p>Explains how their contribution to CR&S strategy development took into account environmental, social, ethical, industrial and sector specific factors and agendas, balancing opportunity and risks.</p> <ul style="list-style-type: none"> • Theme - CR&S principles <p>K18 S15 B7</p> <p>Explains how they ensure their selected approach to assurance of CR&S delivery is ethical, non-judgemental and meets organisational requirements for corporate responsibility, sustainability and quality.</p> <p>K24 K25</p> <p>Evaluates the range of sustainable practices available to any organisation and the mutual benefits responsible corporate approaches bring to their organisation and society.</p> <p>K17 S21</p> <p>Describes a time when they delivered an event to raise funds, justifying their chosen approach with reference to fundraising principles.</p> <ul style="list-style-type: none"> • Theme - The CR&S learning agenda <p>K23 S20 B2</p> <p>Reflects on how they created and designed a tailored CR&S leaning plan for themselves and others in their own organisation, taking account of different learning styles to embed CR&S ethos.</p> <p>K27</p> <p>Outlines how any organisation's chosen approach to CR&S strategy can influence the extent to which it</p>	<p>K19 S10 K26</p> <p>Evaluates how the interdependencies of environment, social and governance agendas influence CR&S strategic approaches in their organisation</p> <p>K17 S21</p> <p>Analyses different fundraising techniques and principles. Describes their reasons for discounting at least two alternative approaches to raising funding.</p> <p>K23 S20 B2</p> <p>Critiques different approaches to developing the expected CR&S ethos and the considerations they take into account when developing learning opportunities.</p>
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	manages its staff talent programme, manage its external reputation, and its ability to use effective corporate branding.	
Fail	Pass criteria not met	

Assessment method 2: Work-based project followed by a report and a presentation with questions and answers

KSBs	Pass – all the following Criteria:	Distinction – pass criteria and all the following:
K1, K2, K3, K9, K10, K12, K13, K14, K15, K20, K22 S1 S2 S3 S7 S9 S11 S12 S13 S17 S19 S22 B1 B3 B4 B5	<p>K1 S1 B3</p> <p>Chooses and applies planning tools relevant to the project, setting appropriate timeframes, preparation of tasks and objectives within own scope of authority, seeking support when needed.</p> <p>K2 S2 B1 B5</p> <p>Utilises both change management and culture management techniques in innovating CR&S activities that champion the CR&S issue under consideration and demonstrate value. Evaluates impact of CR&S engagement to identify further opportunities for stakeholder engagement to improve future CR&S performance.</p> <p>K3 K14 K15 S12 S13</p> <p>Sources, manipulates and analyses a range of data including quantitative and qualitative to provide a secure evidence base, complying with legislative and organisational security and storage requirements.</p>	<p>K1 S1 B3</p> <p>Evaluates their selection and implementation of project management and planning tools and identifies dependencies including escalation routes</p>

	<p>K9 S7 Justifies their selected communication approach with reference to the audience and the circumstances.</p> <p>K10 S9 Considers the most appropriate techniques for producing a report showing the extent to which all CR&S objectives within scope have been met.</p> <p>K12 K13 S3 S11 B4 Demonstrates how their approach to a CR&S issue had regard to the comparative strengths and weaknesses of the key affected stakeholder groups and motivated and led them to work together. Additionally, how they balanced the group dynamic with their own competing workload to prioritise and deliver the required tasks.</p> <p>K20 S17 Demonstrates how all potential CR&S risks, threats and opportunities are identified; and also escalated when outside their own scope.</p> <p>K22 S19 Demonstrates how they have applied the principles of budget management to the direct and indirect costs of the project, fully justifying any overrun.</p> <p>S22 Evaluates potential IT solutions, applying them where appropriate.</p>	<p>K9 S7 Evaluates their selected approach to communication and reflects on how future communications might be enhanced.</p> <p>K12 K13 S3 S11 B4 Justifies their selected approach to allocating and driving CR&S work across their team, articulating why other approaches were discounted when seeking to meet CR&S requirements.</p>
Fail	Pass criteria not met	