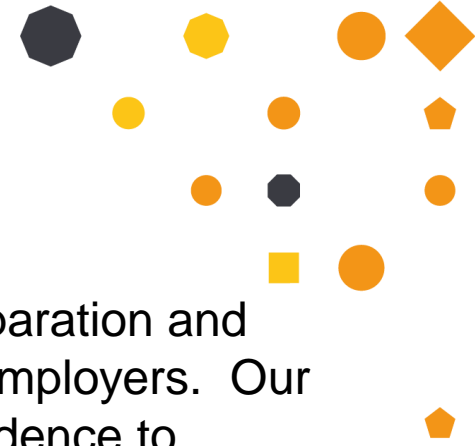


Operations/ Departmental Manager Assessment Plan Changes

Requirements and Best
Practice for the new
Assessment Methods

Webinar 2 in a series of 3
December 2020



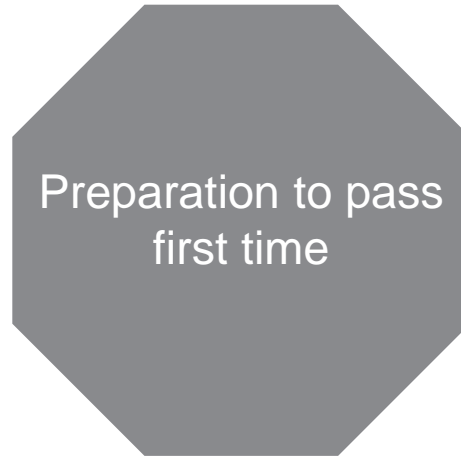
We are here to support you

We are here to offer you end-to-end support you and your apprentices from assessment preparation and guidance, learning resources for on-programme and a robust assessment that is valued by employers. Our high-quality assessment resources ease delivery and provide your apprentices with the confidence to succeed.



Guidance on the process

How-to guides and checklists to prepare teams, plus growing content to inform teams and apprentices on how EPA will play out.



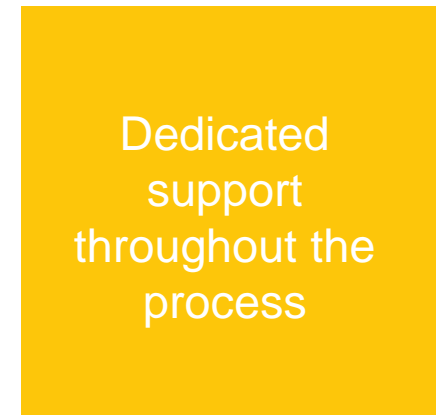
Preparation to pass first time

An EPA preparation tool tailored to the apprentice and the standard.
Growing bank of sample tests and assessments.



Calibre and expertise of assessors

Assessors selected based on industry experience. Each has a thorough induction, receives on-going training and assessment is standardised.



Dedicated support throughout the process

Dedicated EPA team using a tried and tested system to give customers flexibility. For providers, our payment structure is significantly advantageous to their cash flow.

Introducing the Technical Advisors



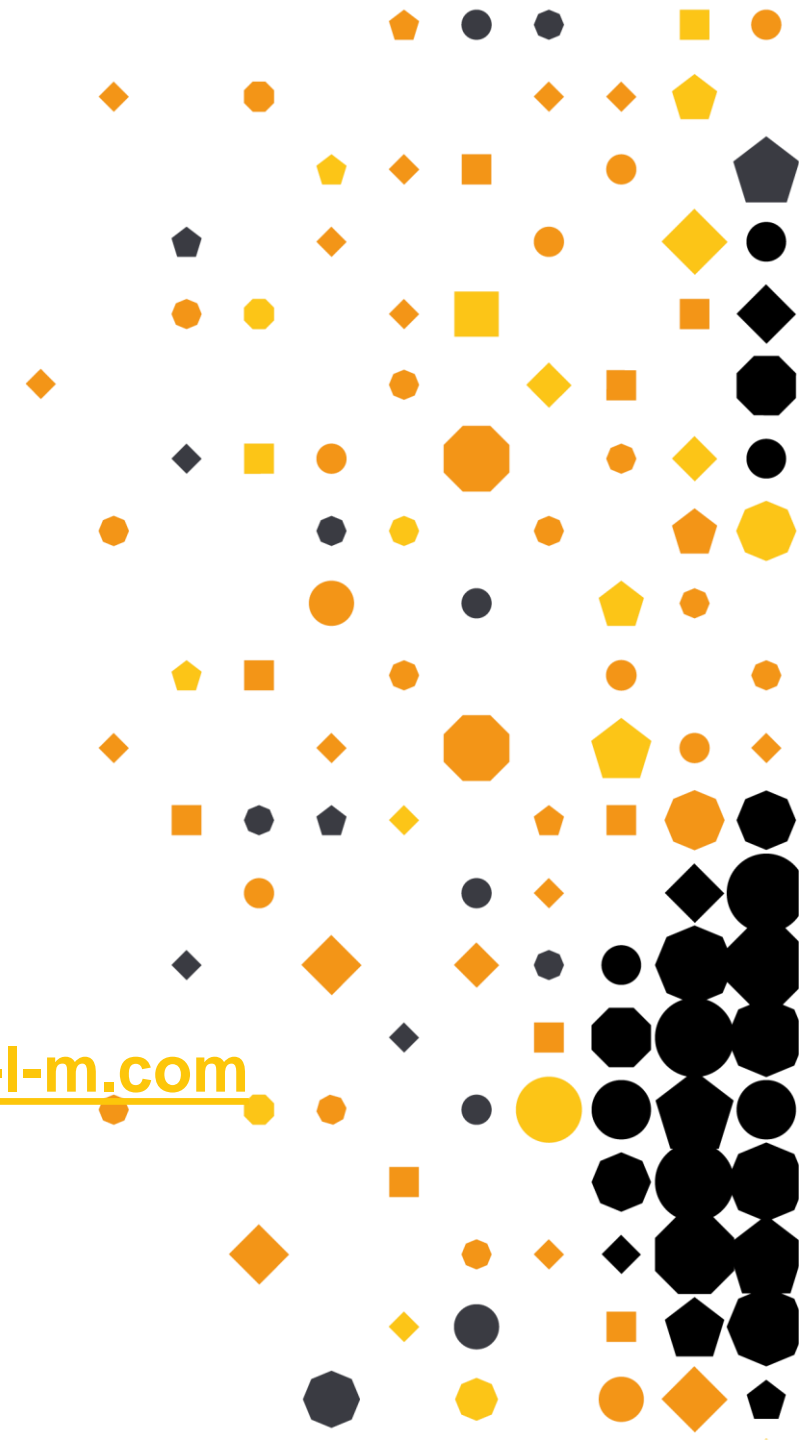
Karen Egan

Karen.Egan@i-l-m.com



Jill Hansen

Jill.Hansen@i-l-m.com



Agenda for today

- **Introductions**
- **Background**
- **The new Assessment Plan the requirements and how it works**
- **Timelines**
- **EPA Pro**
- **Best Practice for first time success**
 - Portfolio of Evidence (not assessed but underpins the Professional Discussion)
 - Professional Discussion
 - Project Proposal, Presentation and Questioning
- **Summary**
- **Questions & Answers throughout**



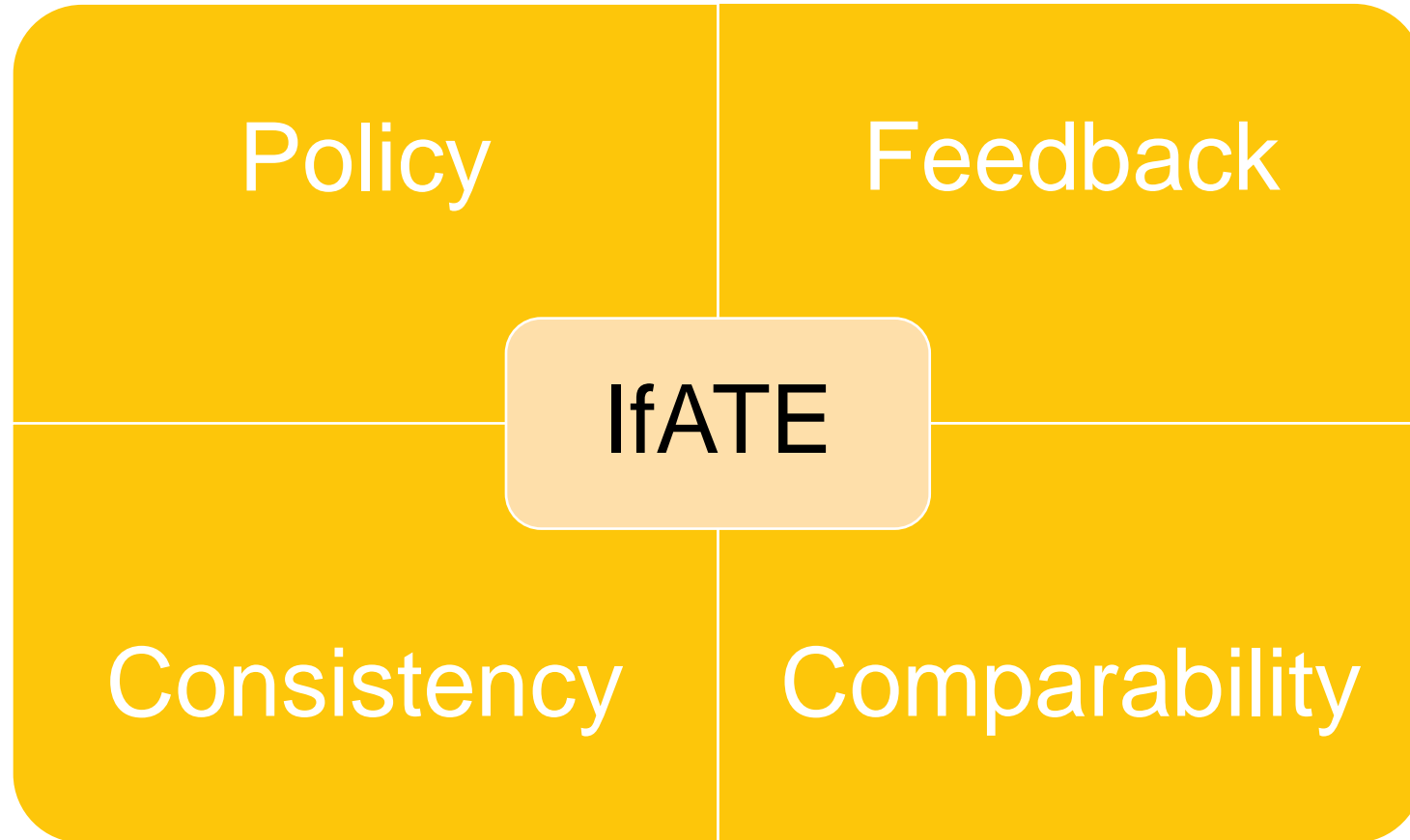
Introducing



Joe Ballantine
ILM Industry Manager



Background to the changes – Why has the Assessment Plan changed?



Introducing



Giusy Polisenno

Development Manager



The new Assessment Plan

And how it works



Professional discussion underpinned by a portfolio of evidence (9309-705/755)

Knowledge, Skills, Behaviours (KSBs) Groups

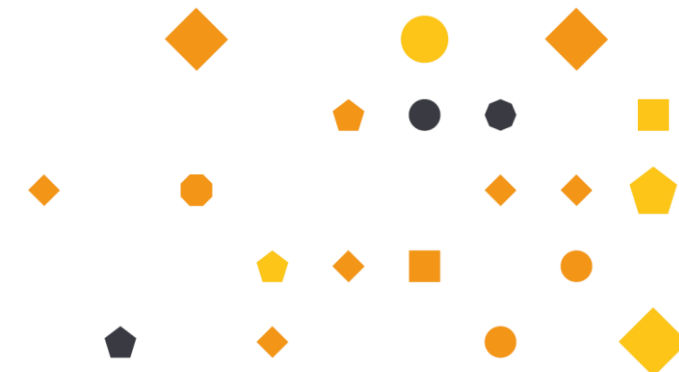
- Operational Planning and Management
- Managing Teams
- Communication Skills
- Personal & Professional Development

Time duration and settings

- 60 minutes plus 10%
- **Minimum of 6** competency based questions

Requirements of portfolio of evidence

- Submitted at Gateway
- The portfolio is **not** directly assessed, it underpins the professional discussion
- Accompanied by mapping document
- Should **not** include reflective accounts or any methods of self-assessment expect for evidence S8.1
- At **least one** piece of evidence for mapped KSBs
- Typically 20 pieces of evidence



Portfolio of evidence content requirements

Qualitative as opposed to quantitative approach is suggested

Evidence sources may include:

- workplace documentation/records, for example workplace policies/procedures, records, Personal Development Plan (highly recommended)
- witness statements
- annotated photographs
- video clips (maximum total duration 20 minutes); the apprentice must be in view and identifiable
- Employer contributions to focus on direct observation of performance rather than opinions.
- The evidence must be valid and attributable to the apprentice - a statement from the employer and apprentice confirming this





Project Proposal, Presentation and Questioning (9309-704/754)

Split across two components

- Assessed holistically
- Component 1 - Project Proposal
- Component 2 - Presentation with questioning

Knowledge, Skills, Behaviours (KSBs) Groups

- Planning their Project Proposal
- Delivery of their Project Proposal
- Project Proposal Output

Based on any of the following

- The need to review and implement a change plan to improve efficiency in the work place
- 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 need to implement a direct saving (e.g. percentage decrease in direct costs, reduction in headcount) across their team, department or organisation following a reforecast activity

Project Proposal, Presentation and Questioning (9309-704/754)

Component 1 – Brief Summary and Project Proposal

Project Proposal's subject, title and scope

- Agreed between employer and EPAO at Gateway
- A **Brief Summary** submitted at Gateway
 - Not assessed
 - No more than 500 words
- Meets the needs of the business
- Is relevant to the apprentice's role
- Allows the relevant KSBs to be assessed for the EPA

Structure of Brief Summary

- Overview of apprentice's role as an ODM in relation to the project
- Outline of the project and purpose
- The real business benefit anticipated as a result of implementing the project
- The length of the project (start date and anticipated end date)

Once the Project Proposal is approved

The apprentice has 12 weeks to write

- Detailed Project Implementation Proposal
- Does not need to be fully implemented
- However must have sufficiently progressed to be able to evidence S1.2, S2.1, S2.2, and S3.1



Project Proposal, Presentation and Questioning (9309-704/754)

Component 1 – Project Proposal

Specification for the Project Implementation Proposal

- **4,000** words (+/- 10%) including tables, graphs, figures but excluding references and annexes
- Include an annex showing how the proposal maps to the KSBs
- Executive Summary
- Introduction
- The scope of the proposed project (including key performance indicators)
- Objectives
- A project plan (including Gantt charts, risk/issue/mitigation, responsibility assignment matrix (RACI matrix))
- How the proposed project outcomes will be achieved
- Comment on the validity of the methods of analysis, data interpretation and data presentation used
- Financial budgeting and resources
- Proposed implementation plan including communications and stakeholder plans
- Advise whether an alternative approach might be considered
- Advise upon whether it could be completed in a more cost or time efficient manner
- Recommendations and conclusions
- Be submitted (along with the presentation) within **12 weeks** of project proposal being agreed along with the presentation



Project Proposal, Presentation and Questioning (9309-704/754)

Component 2 – Presentation and Questioning

Presentation

- Submitted with the Project Implementation Proposal
- Focus on Project Implementation Proposal
- Must follow specific themes as set within the Assessment Plan
- IEPA has 2 weeks to review and prepare appropriate questions

Content of Presentation

- **Operational management** - business tools, management systems, identifying and overcoming barriers, identifying opportunities and interpretation of data
- **Project management** - using tools and techniques to plan and deliver outcomes, approaches to identifying and managing risks.

- **Finance** - monitoring budgets and financial implications
- **Leading people** and supporting management of change
- **Building relationships**
- **Communication** skills
- **Managing self** - prioritising activities and time management
- **Decision making** and using evaluation techniques to support the process
- **Progress** of the implementation of the project proposal to date



Project Proposal, Presentation and Questioning (9309-704/754)

Component 2 – Presentation and Questioning

Questioning

- **Minimum of 9** questions – at least one from each specific themes of the presentation
- Questions will be for
 - Clarification
 - To assess the breadth and depth of understanding

Time duration and settings

60 minutes plus 10%

- **Typically**
 - 20 minutes presentation
 - 40 minutes questioning



Things to note

Pass and Distinction descriptors

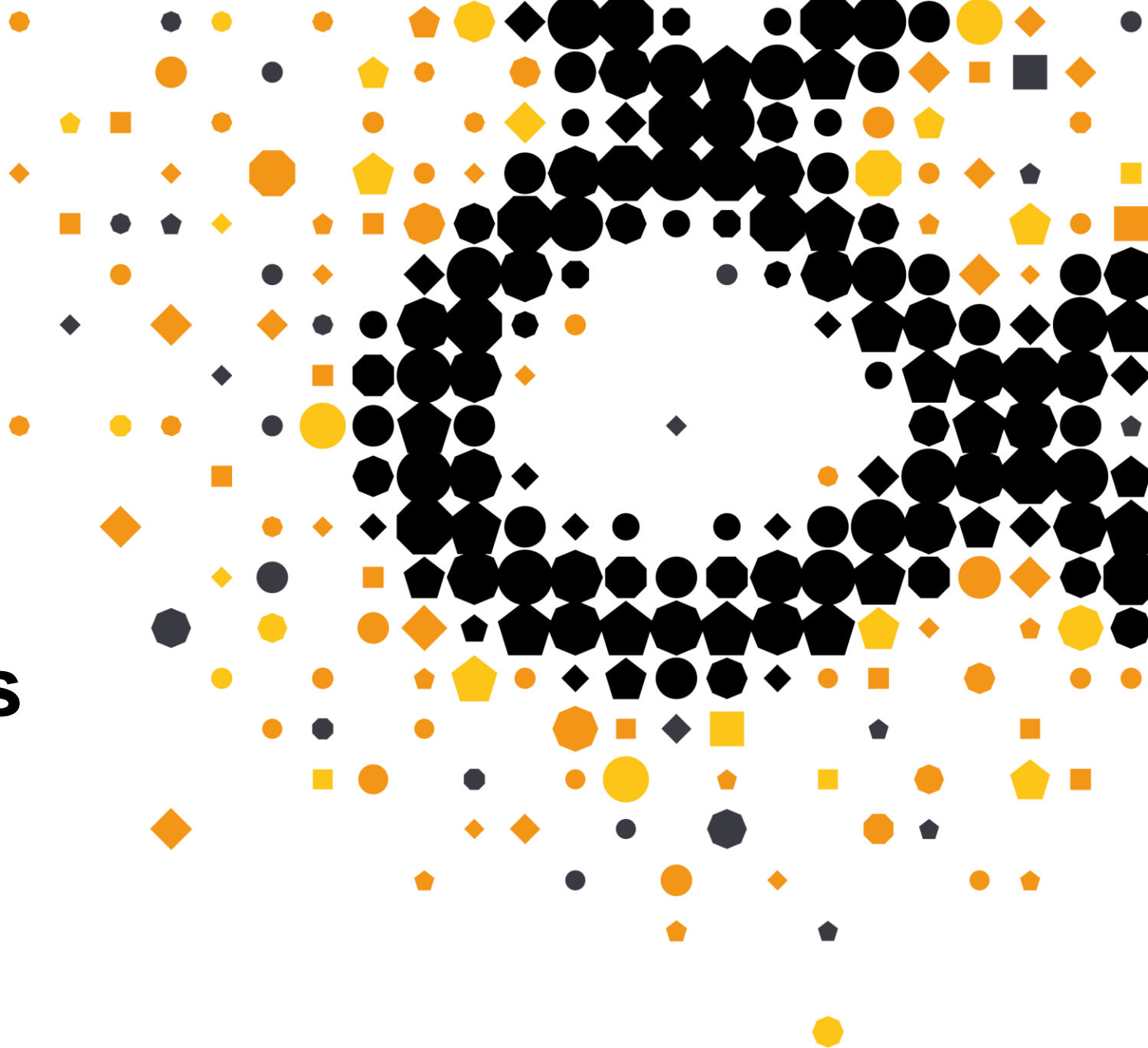
- The Assessment Plan sets out Pass descriptors and Distinction descriptors
- **ALL** Pass descriptors need to be met to gain a pass (100%)
- **ALL** Distinction descriptors need to be met to gain a distinction (100%)

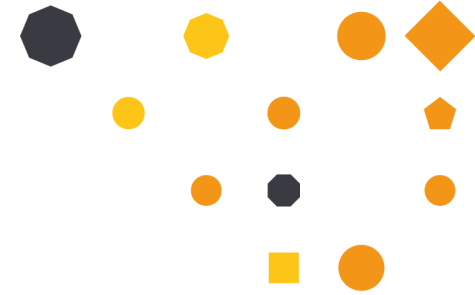
The Groupings are key

- Although the KSBs have not changed they are grouped differently to the standard

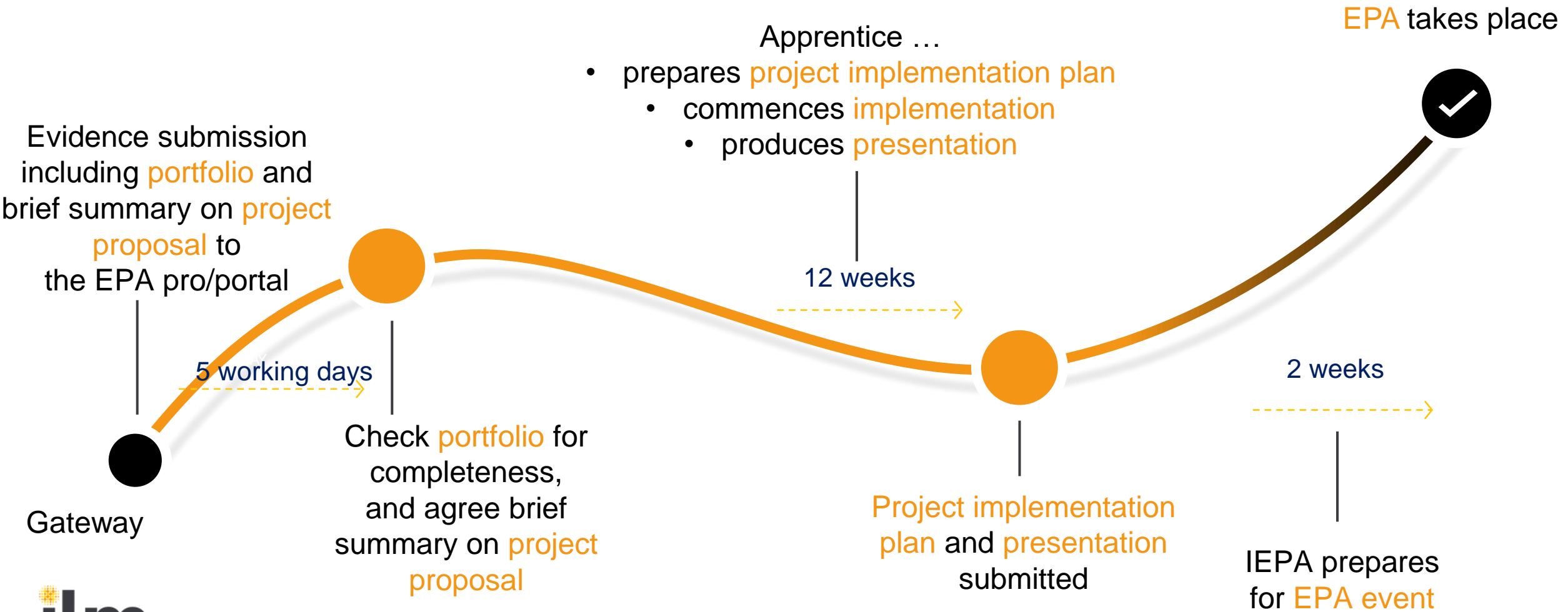


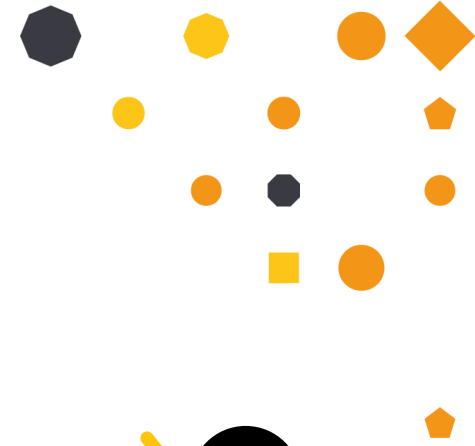
Pause for Questions



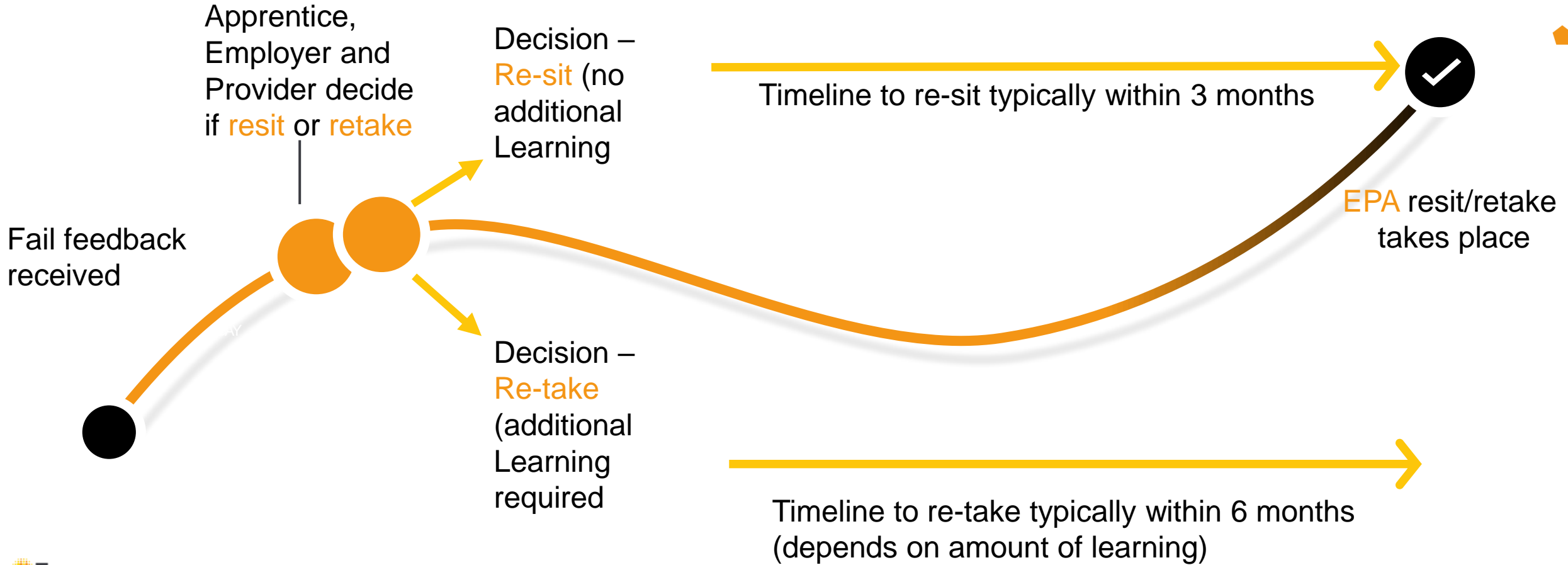


Timeline of EPA assessment



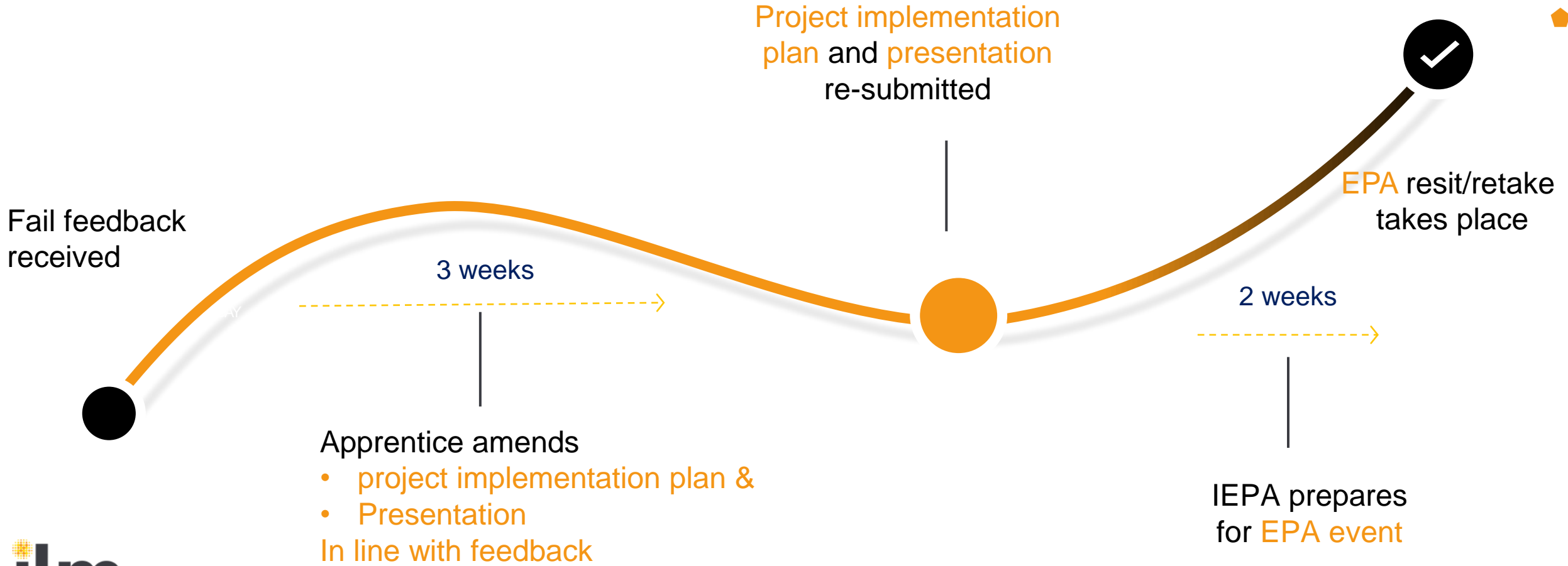


Timeline of EPA resit/retake





Timeline of EPA resit/retake for Project Implementation Proposal and Presentation with questioning

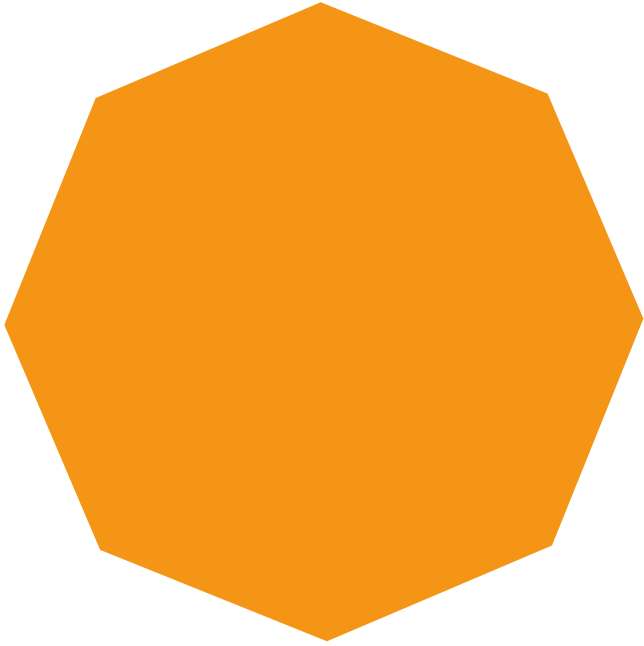


Pause for Questions



Getting it right first time





Portfolio of evidence

Underpins the Professional Discussion

What is a portfolio of evidence?

A concise collection of the apprentices best pieces of evidence

IEPA uses this to familiarise themselves with the apprentice's work and prepare for the professional discussion



Complete an Evidence Matrix (mapping document)

- Ensure no gaps
- If more than 2 pieces of evidence mapped to a criterion consider removing some (may be considered as excessive)
- Only include relevant Knowledge Skills and Behaviours (KSBs)
- If document is large direct the IEPA e.g. page number and paragraph
- Remove/ redact any confidential



General guidance for the portfolio

The Portfolio needs to holistically show:

- Application of knowledge learnt
- Acquisition and demonstration of skills
- Demonstration of behaviours

Holistic approach

As candidates become independent in their work and complete larger activities

- likely to provide the most holistic evidence - i.e. covering a number of KSBs/descriptors at once.
- Select evidence that most efficiently meets all the relevant KSBs/descriptors, and which demonstrates their best performance.

Contextualised

Contextualisation by learners is key, it allows them to demonstrate

- the role they played in creating the evidence presented, and
- provides a platform for the learner to demonstrate why they made decisions, why they chose to implement a certain model, etc.

Authenticated

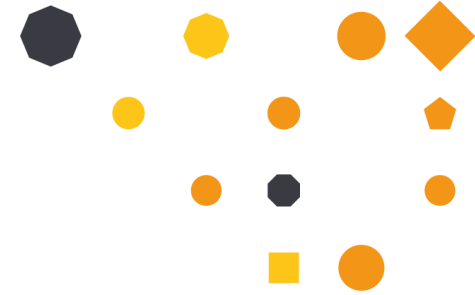
(signed off that it is that of the apprentice)

Handwritten/e-signature matching authentication form on each piece of evidence.

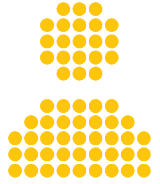
Should not include

Reflective accounts and self-evaluation





Tips for compiling a portfolio:



Only include evidence that is relevant



Witness testimony

- Cover several (if not all) areas of this part of the standard
- Can be written and updated throughout the apprenticeship



Use the sample evidence matrix (or similar)

- Evidence can be quickly found
- clear, accurate referencing to show how the candidate has met the descriptors and how evidence is being used.



Consider recording one **professional discussion** or include one assignment to cover all of the knowledge



We want to see apprentices **best work** – so if you have evidence of chairing 6 team meetings – **pick the best one!**



Audio/Video Files

- Less than 60 minutes
- Timestamped
- Of good quality

20 Pieces of evidence – what does that look like?

- We are happy to receive a small 'bundle' of documents that would class as one piece of evidence (up to 5 documents)
- The documents within the bundle must relate to each other
- They should then demonstrate a holistic approach and evidence several criteria



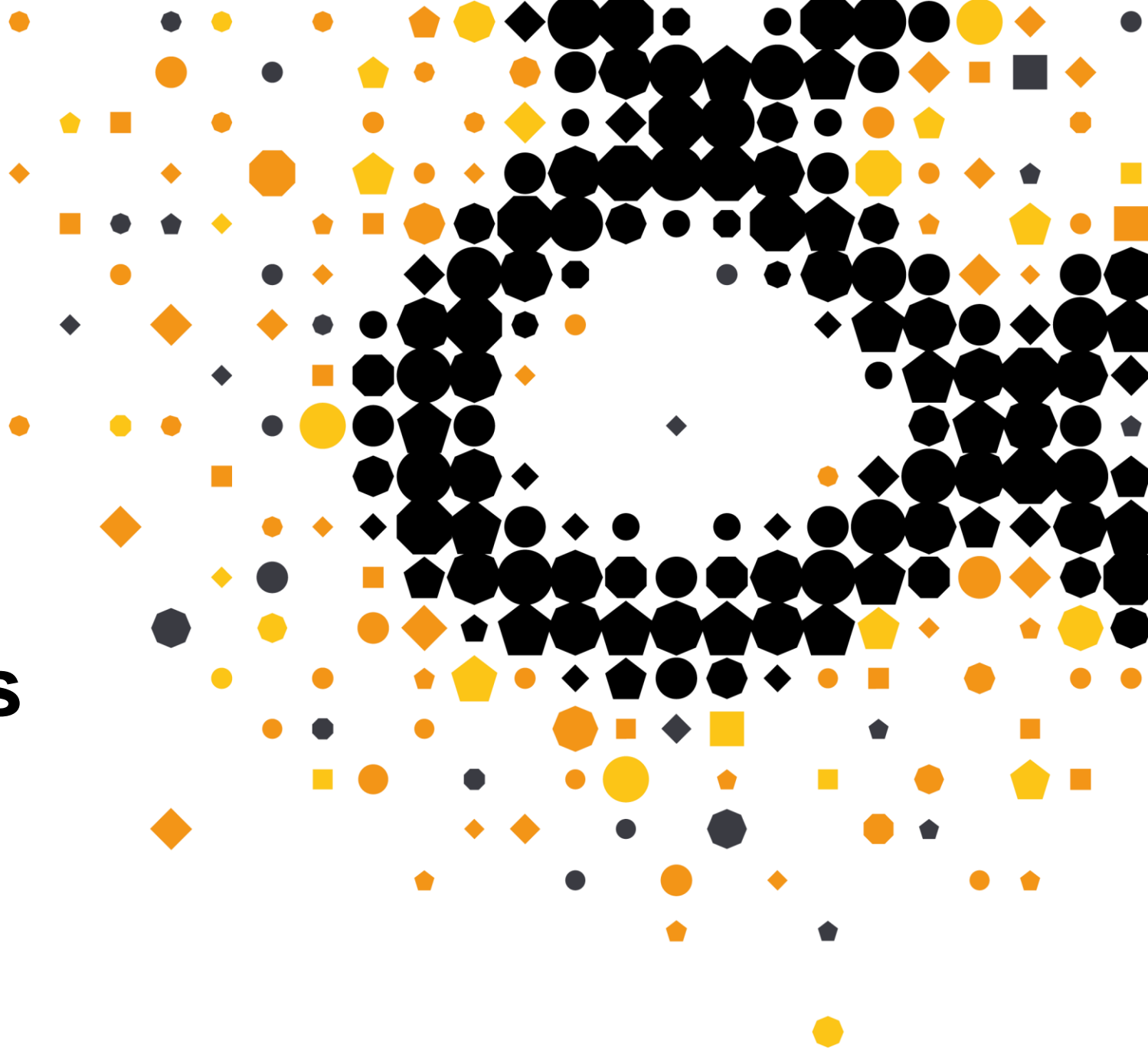


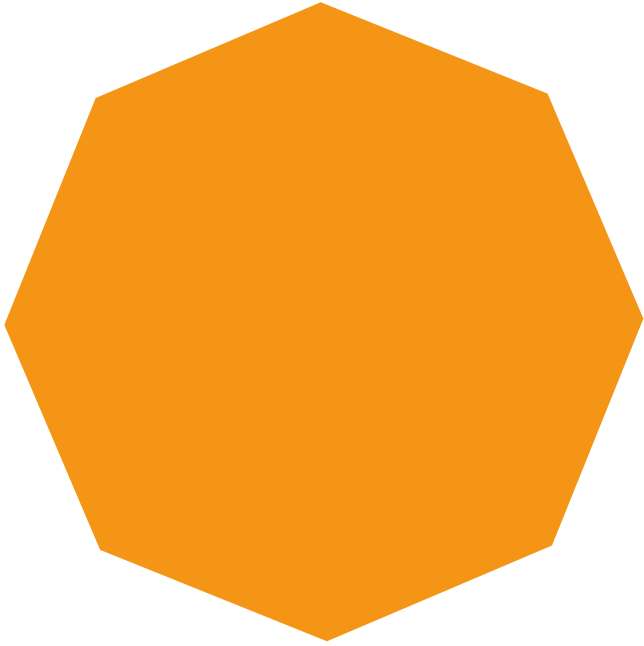
End-point Assessment

General guidance for the portfolio

- Evidence must meet the requirements of **VACS**:
 - **Valid/Relevant** – it must be obtained in a real working environment that accurately reflects the apprentice’s day-to-day work. It must relate to the criteria being evidenced.
 - **Authentic** – it must be the apprentice’s own work, unguided and in a real working environment (where possible). It must be clear what role the apprentice has played in producing the evidence presented
 - **Current** – the evidence must have been produced while the apprentice was on-programme/doing their apprenticeship.
 - **Sufficient** – the evidence must fully cover the KSBs/descriptors it’s intended to, partial coverage of an KSB/descriptor does not demonstrate full knowledge or competence.

Pause for Questions





Project Implementation Proposal

Some things to consider when preparing the Project Implementation Plan

Assessed holistically alongside the Presentation and questioning

- **Make a conscious decision about how much you will cover in the Plan**
 - All the pass and distinction criteria?
 - All the pass criteria?
 - Some pass and some distinction criteria?

Use the annex (mapping/ matrix document) to show how the Plan maps to all the KSBs that are assessed by this method

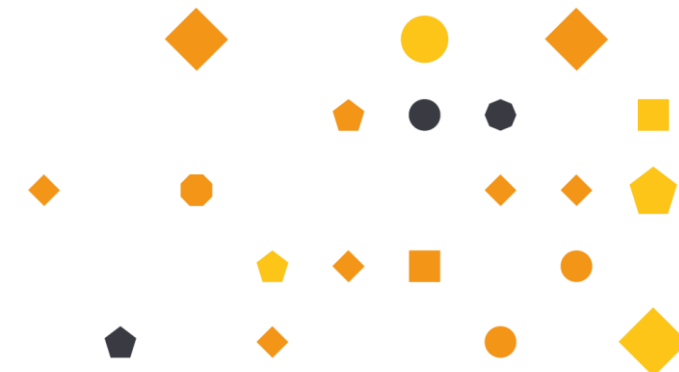
Understand clearly where there are 'weaknesses' in the Plan

- **So you can cover completely in the Presentation (using the product evidence from the Plan)**

You only have 4,000 words – use them concisely

There is no template but...

- **Work to the headings in the Assessment Plan**
- **Understand precisely what criteria is required to be met in each section**
 - i.e. planning, Delivery or output





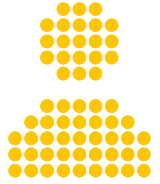
Professional Discussion and Questioning following the Presentation

Suggested approach and preparation



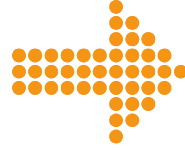


Good practice to prepare for EPA



Practice Practice Practice

As much as possible and the more 'strangers' you put in front of the apprentice the better to get them used to different people – what role is the employer playing in preparing their apprentice too?



Competency based answers

Apprentices should respond with examples of how they have carried out tasks, where possible referring to evidence submitted and/or the competencies in the standard



Purpose

Apprentices need to be clear on the purpose of the PD/Q&A and which parts of the standard they are being assessed on so they know how to structure their responses



Standardisation

Prepare a bank of questions that can be used with apprentices in preparing them pre EPA



Technology

As this assessment is remote, introduce 'technology' to prepare apprentices while on-programme



Feedback

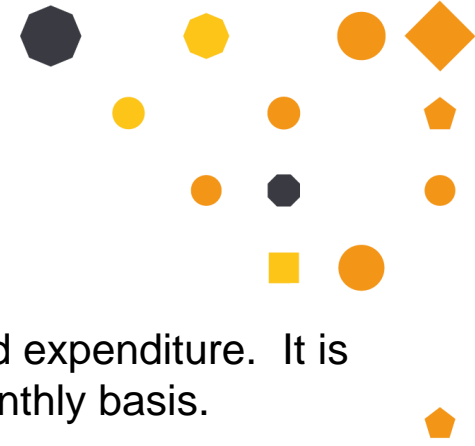
Is the apprentice getting developmental and affirmative feedback in line with the EPA PD/Q&A grading descriptors - how are they acting upon this feedback?



S.T.A.R.R: A way to think about your response to questions

The key thing we in the PD and Q&A: *show us what you do.*

- Situation:** What were you asked to do, why and by whom? This can include regular routine activities, a collection of smaller activities on a single theme or a distinct task/project that has been set.
- Task:** The detail of what you propose to do and the plan of actions to be undertaken, with explanation as to why you have decided to do things in a certain way and why elements of the plan have been done in a certain order.
- Action:** Walk through what you are doing/did with screenshots, photos, etc. and appropriate annotation.
- Result:** What was the outcome of the work you carried out? Success/failure? Who provided feedback? Did you hand the work over to someone who signed off the completion?
- Reflection:** Did it go to plan? Did the outcome and activity run as you expected? What would you do faced with a similar task in the future – do the same things or different? What else might have helped you carry out the task?



S.T.A.R.R: Example



I manage a small budget within my area of work which has different elements of income and expenditure. It is my responsibility to monitor the spend and income and report back to my manager on a monthly basis.



Here is the overview of the budget and each of the income /expenditure elements that need to be reviewed and checked. I have shown what time it should take for me to gather this information and the deadlines I need to meet. As part of my plan, I will check records of expected activity and liaise with various departments to check all costs and invoices have been processed.



These are the checks I perform (*screenshots with annotation*). This is how I ensure all activity has been recorded (*screenshots with annotation*). Here are examples of the budget analysis I carried out comparing expected activity against actual (*screenshots with annotation*).



Here is the report to my manager OR not all of the activity was processed and here is my report to my manager with an action plan to remedy this.



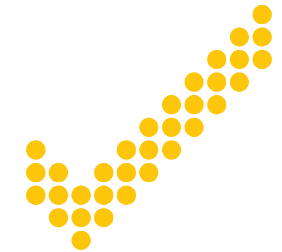
This is the feedback I received about the work I had done. While it was successful/not successful this is what I think went well/bad and I would recommend a change/no change to this process in the future. *Changes to be outlined if appropriate.*



Areas of good performance seen by IEPAs

Apprentices have their portfolio ready and organised for reference, have their photographic ID ready are confident and experienced in using webinar

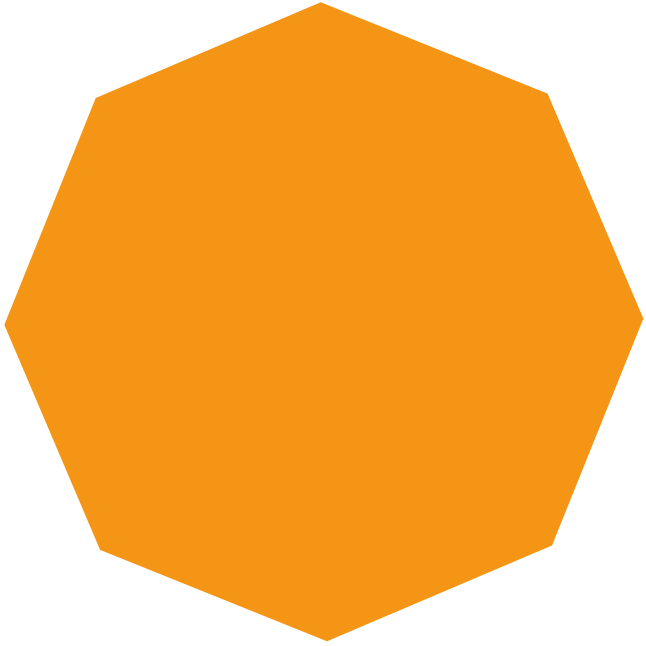
Apprentices who have undertaken guided practice prior to the EPA are performing well – linking KSBs to experience within their workplace



For Professional discussions they have practiced in advance and are aware that this is a discussion and not a question and answer session

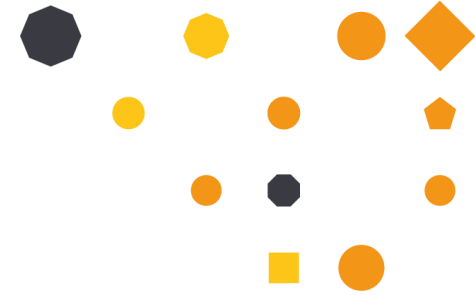
They understand the purpose of the Professional Discussion and Q&A and know the KSBs they are being assessed on



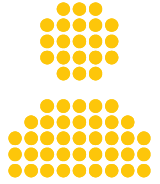


Presentations

Suggested approach and preparation



Presentations – preparing well



Practice Practice Practice



Know what is being assessed

Make sure apprentices know which KSBs/grading descriptors they are to be assessed against and have covered them in the presentation



Timing and structure

Apprentices have 20 minutes use it well and keep to time

Structure the presentation
News at Ten model??

- Headlines
- Detail
- Summarise



Design

- Don't overcrowd the slides (if using)
- Make good use of relevant graphics



Style

- Speak clearly
- Remember your audience (don't use internally used jargon)
- Don't just read from the slides (if using)

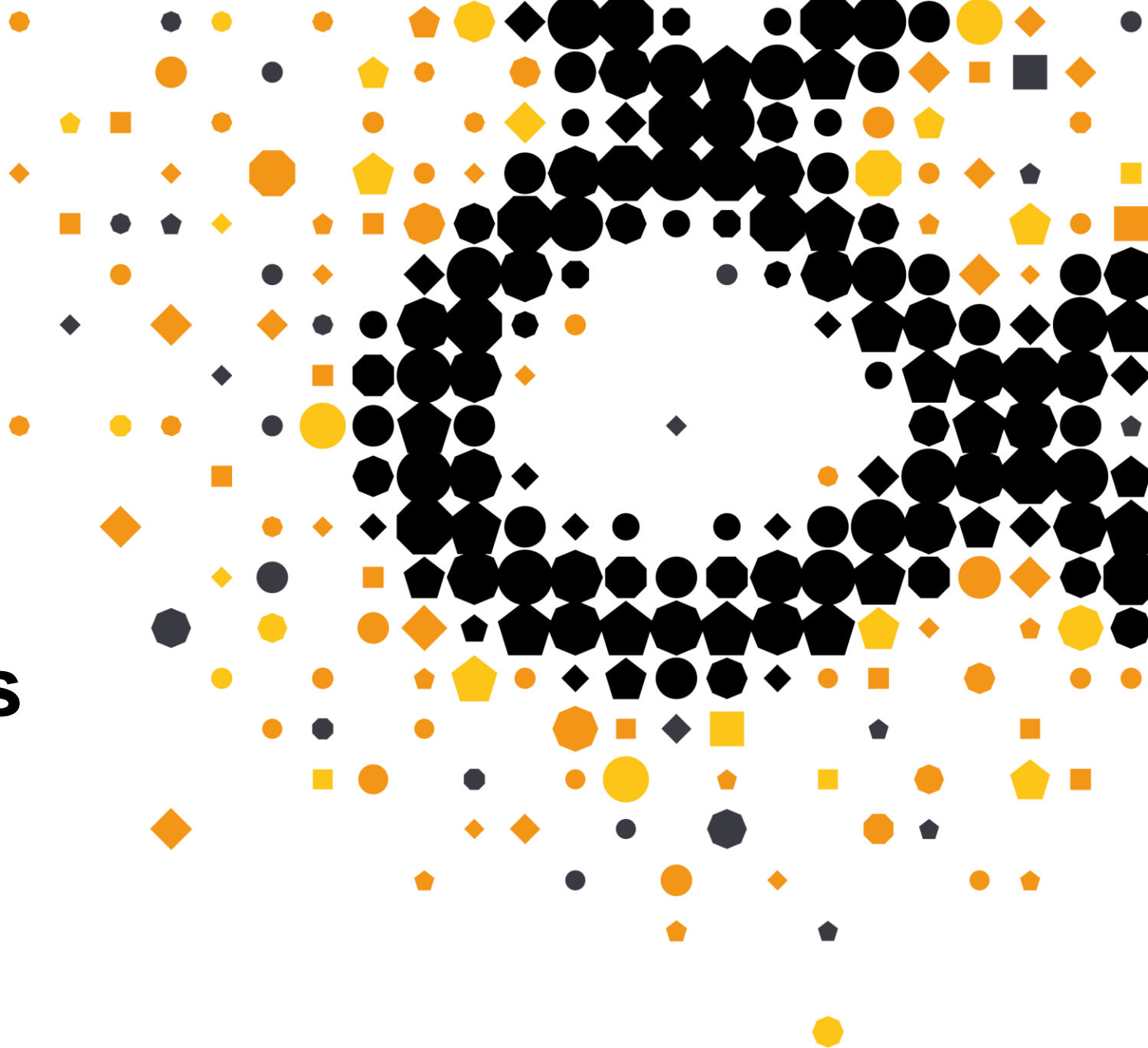


Practice Practice Practice

Lesson Learned and Good Practice for apprentices

DO	DON'T
Arrive for all EPA assessments with photographic ID to present to the IEPA	Forget to bring your passport, driving licence , work id badge – must have a face picture
Speak clearly and concisely	Search Google during the interview for answers
Talk about what you have done, e.g. “I did.....”	Say “we”, unless you qualify it
Use examples in your answers	Be vague
Think about your answers before you give them	Make assumptions
Stay calm – listen to the questions being asked	Ignore what you think may be obvious
Ask for any question to be repeated or re-phrased	Assume you have understood if you are not at all sure
Ask to talk about tasks that you feel are your best work	Be scared to also lead on the discussion
Put answers into the context of your workplace and role	Assume the IEPA knows all about your organisation and how they work

Pause for Questions



Introducing



Morice Hole

**End-Point Assessment
Partnership Manager**



Evolution of our EPA Delivery

You told us you wanted:

- All of your EPA journey in **one platform**
- **Simplified** workflows, less *'back & forth'*
- To get **closer** to our IEPA's in terms of booking events
- **Clarity** around Gateway requirements
- **Easier** process to upload gateway and assessment evidence

For more details on our EPA Pro platform and our end to end EPA process please see our separate slide presentation



- **More visibility** of stage/progress or apprentices and cohorts
- **Better** reporting capability
- **Faster** access to results
- More ways to **celebrate success** for your apprentices

Introducing the EPA Partnership Managers



Rebecca Hollamby
for the Midlands

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Rebecca.Hollamby@cityandguilds.com



Janice Collins
for the North

M: 07872 463170

Janice.collins@cityandguilds.com



Morice Hole
for the South

M: 07718 092138

Morice.hole@cityandguilds.com

Email your dedicated EPA support team: centresupport@cityandguilds.com

Phone: [0844 543 0000](tel:08445430000) (option 5)

Webchat: cityandguilds.com/help/contact-us



Next steps

Join us for webinar 3 in the series:

Operations/ Departmental Manager Assessment Plan Changes

Webinar 3: Informal webinar responding to your questions:

14th December 2020 at 9.30 am

To book a place go to [i-l-m.com/news-and-events/events](https://www.i-l-m.com/news-and-events/events)



Recordings of all 3 of our webinars will be shared with you directly and posted onto our website alongside frequently asked questions following webinar 3

www.i-l-m.com/news-and-events/events/recordings



Next steps

Visit our website for more information

Visit our webpage for more information on the new standard: i-l-m.com/team-leader-assessment-plan



Look out for our upcoming communications direct to your inbox



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Thank you

