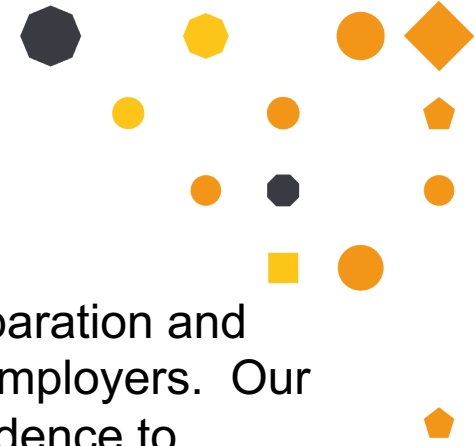


# Team Leader / Supervisor Assessment Plan Changes

## Best Practice for the new Assessment Methods

Webinar 2 in a series of 3

Thursday 16 July



# 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



**Karen Egan**

**ILM Technical Advisor**



# Agenda for today

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



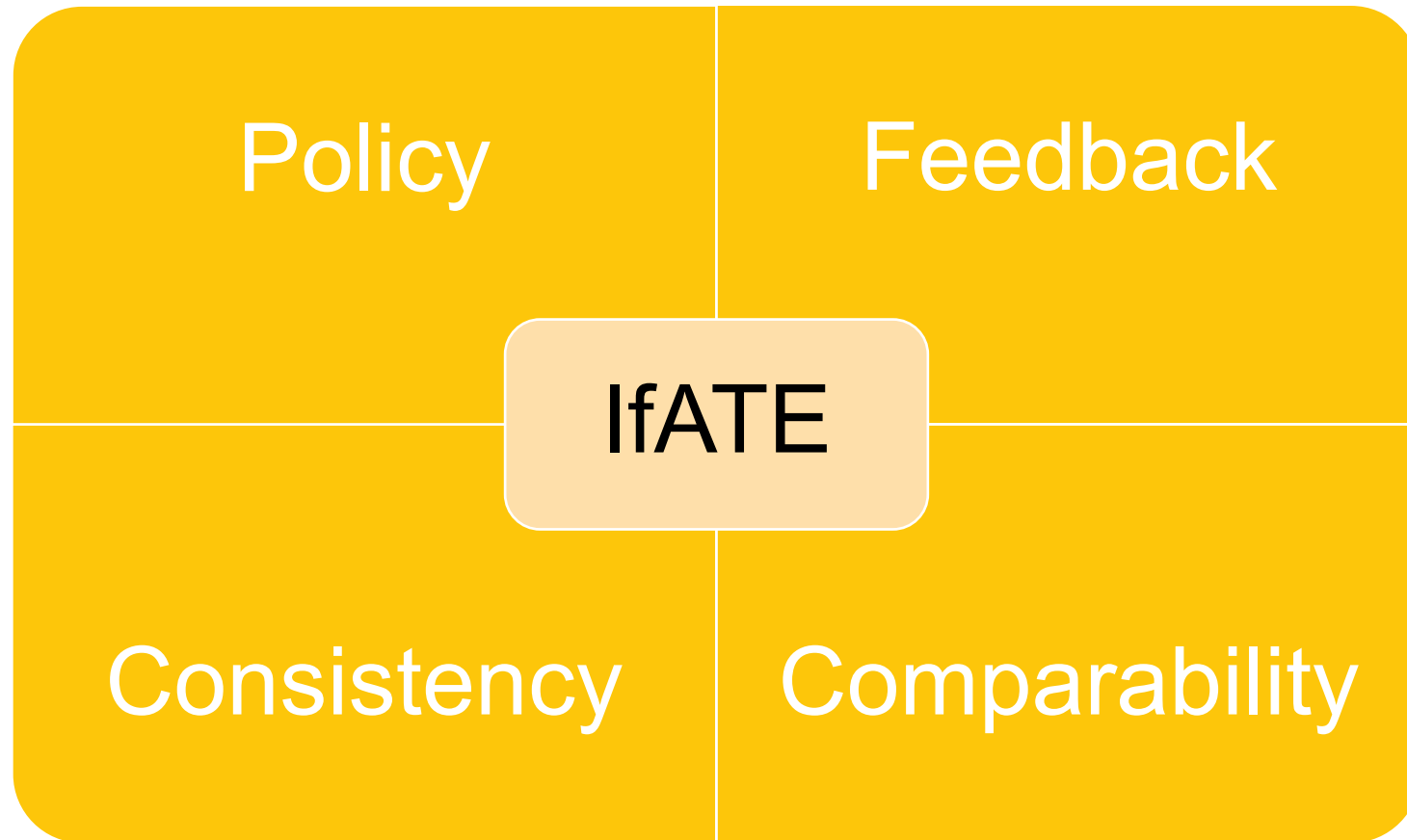
# Introducing



**Joe Ballantine**  
**ILM Industry Manager**



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



# Introducing



**Giusy Polisenio**  
**Development Manager**



# The new Assessment Plan

## And how it works





# Two Assessment Methods (down from four)

## Presentation with Q&A Session

### Based on Knowledge, Skills, Behaviours (KSBs) Groups

- Team Building and Development
- Communication
- Organisation Structure & Strategy
- Problem Solving
- Data Analysis

### Topics & title given post Gateway

#### Will be one of the following based on the portfolio

- Reviewing ways to reduce cost and increase efficiency in a business environment
- Implementing a performance management process within a team or business unit
- Supporting their team through a period of change within their organisation
- Managing a difficult situation within their team
- Solving an operational problem within the workplace

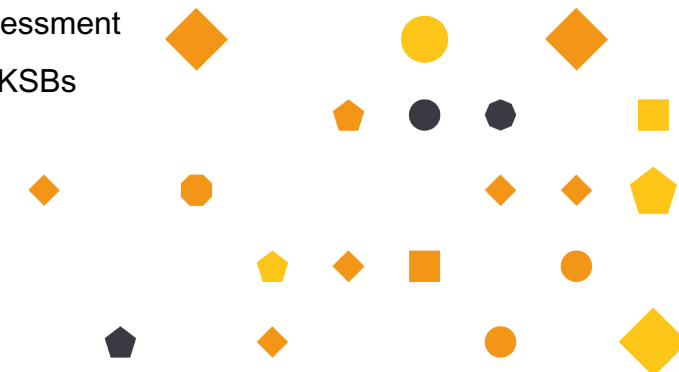
## Professional Discussion (underpinned by a Portfolio of evidence)

### Knowledge, Skills, Behaviours (KSBs) Groups

- Building a High Performance Team
- Project Management
- Organisational Governance
- Managing Self

### 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 any methods of self-assessment
- At least one piece of evidence for mapped KSBs
- Typically 20 pieces of evidence



# 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
- ALL Distinction descriptors need to be met to gain a distinction

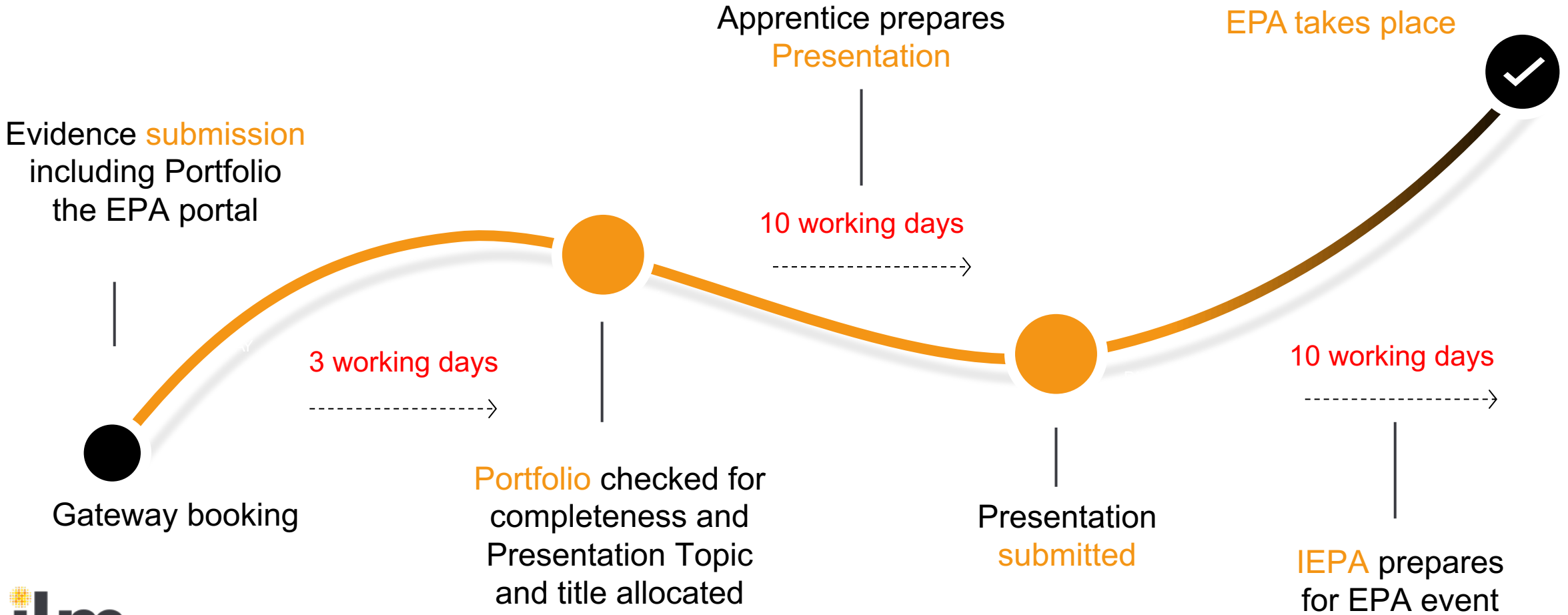
## The Groupings are key

- Although the KSBs have not changed they are grouped differently to the standard
- Be aware of the presentation topics and prepare for them while on programme

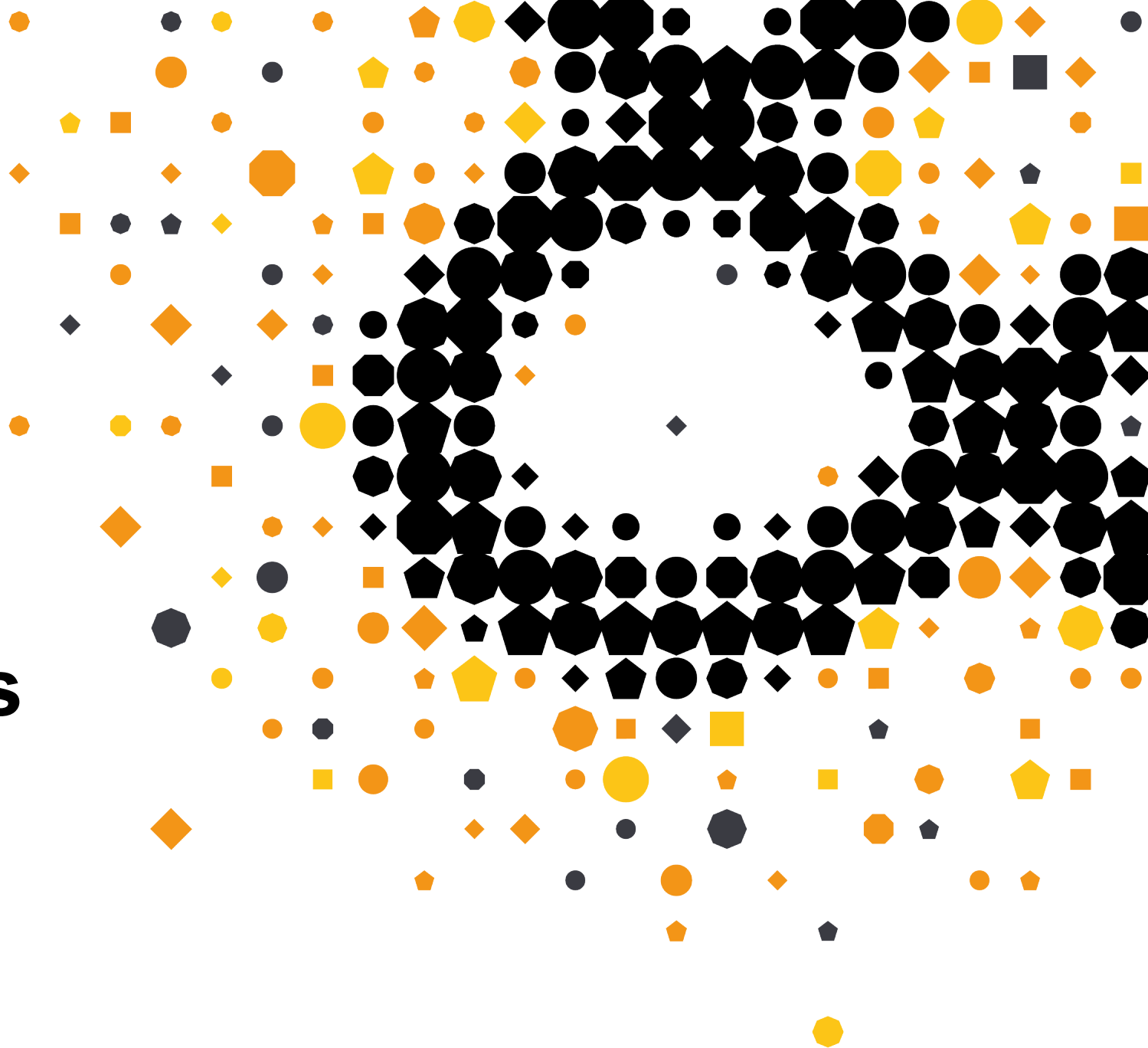




# Timeline of EPA assessment



# Pause for Questions



# 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



# Portfolio is not assessed – however....

It must cover ALL the KSBs for the Groupings required for the Professional Discussion ♦

- Building a high performance team
- Project management
- Organisation governance
- Managing self
- Submitted at Gateway
- Accompanied by mapping document
- Should not include any methods of self-assessment
- At least one piece of evidence for mapped KSBs
- **Typically 20 pieces of evidence in total**



# 20 pieces of evidence – what does that look like?

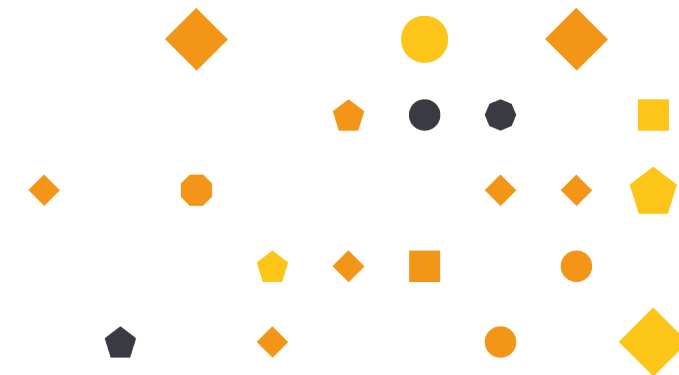
## Include

- video/audio extracts
- written statements
- project plans
- reports
- minutes

**Note:** it is advisable that when video/audio extracts are included as part of the evidence submitted, it should not exceed a maximum of 60 minutes in total

## Include

- observation reports;
- presentations
- feedback from managers, supervisors or peers;
- papers or reports written by the apprentice;
- CPD Log;
- Personal Development Plan;
- Performance reviews.





# 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.

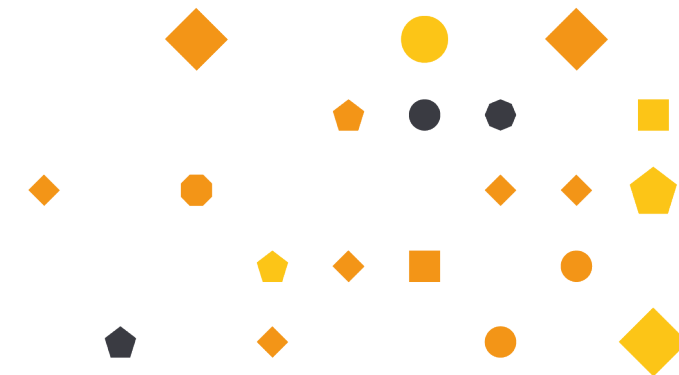
## Authenticated

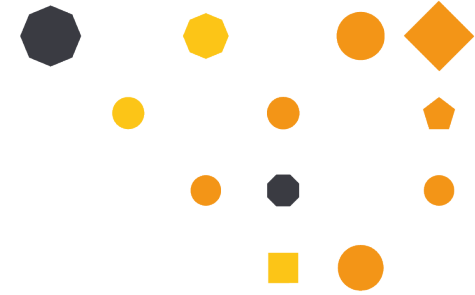
(signed off that it is that of the apprentice)

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

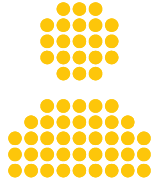
## Should not include

Reflective accounts and self-evaluation

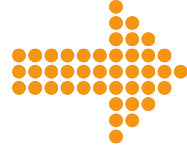




# Tips for compiling a portfolio:



There are large number of evidence descriptors to included so **only include evidence that is relevant**



**Plan/map work activities to identify how a holistic approach can be adopted –**



**Use the sample evidence matrix** (or similar) so that the evidence is easy to find for the IEPA – clear, accurate referencing will make it easier for all to see how the candidate has met the descriptors and how evidence is being used.



**Quality of evidence** – e.g. ensure observations/ recordings are clear, with audio or visual aspects of a high enough quality to be able to make an assessment decision.



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



Keep audio and video files down to a maximum of 60 minutes and ensure you have time stamped them so that the IEPA can go straight to the relevant sections

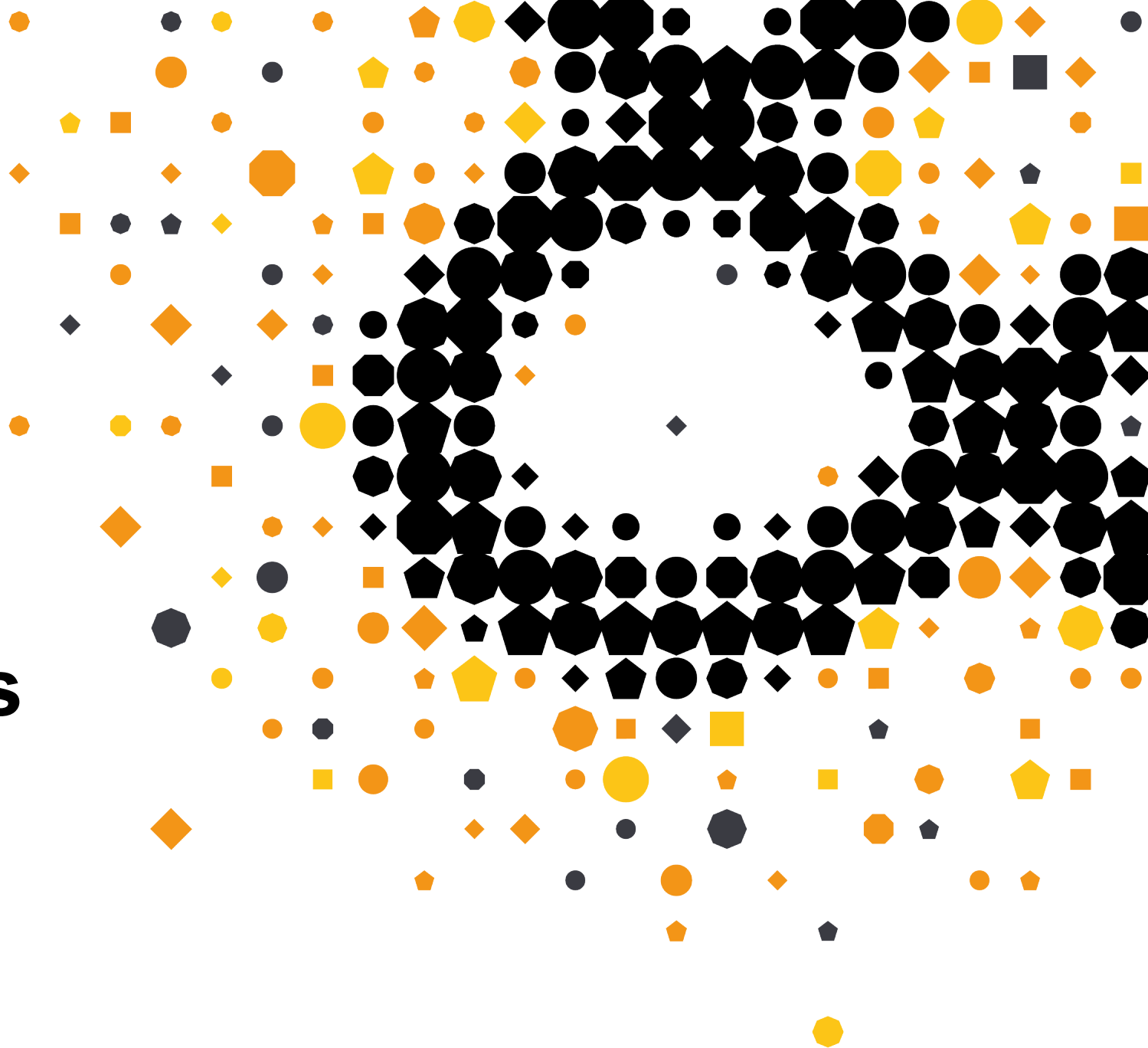


# End-point Assessment

## 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 apprentices 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



# Professional Discussion





## Focus on... Professional discussion



A two-way conversation between the apprentice and an IEPA.

Will be appropriately structured to draw out the best of the apprentice's competence and excellence.

Ask a minimum of 6 competency based questions to prompt discussion – further questions will be asked for clarification purposes

IEPA and Apprentice have access to portfolio and can both refer to as needed

# The Professional Discussion will assess the Knowledge Skills and Behaviours as set out in the following Groupings

- Building a high performance team
- Project management
- Organisation governance
- Managing self



# Focus on the Presentation with Questions and Answers







## Focus on... Presentation with Q&A



Typically 20 minute presentation with 30 minute Q&A  
The Q&A session is to confirm the apprentices understanding of the presentation and how they demonstrated the relevant knowledge, skills and behaviours

**minimum of 5** questions across **each** of the following areas:

- team building and development,
- communication,
- organisational culture and strategy
- problem solving
- data analysis

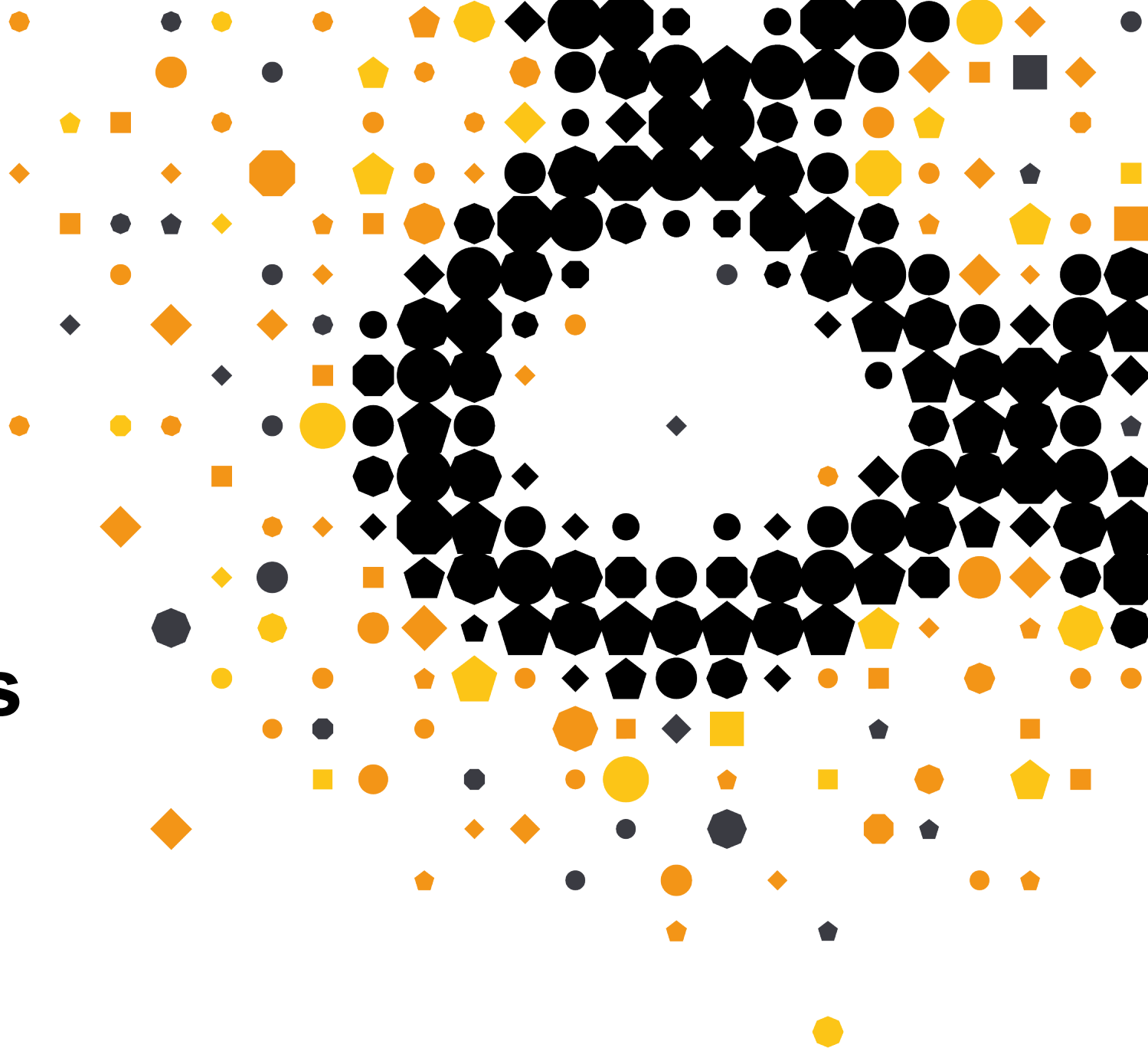
# Presentation with questions and answers

## Presentation Topic Titles

- Reviewing ways to reduce cost and increase efficiency in a business environment
- Implementing a performance management process within a team or business unit
- Supporting their team through a period of change within their organisation
- Managing a difficult situation within their team
- Solving an operational problem within the workplace



# Pause for Questions



# Getting it right first time



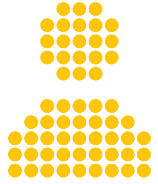
# Professional Discussion and Q&A

## 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

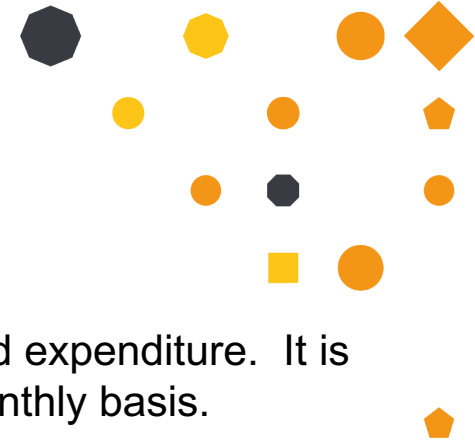
Is the apprentice getting developmental and affirmative feedback in line with the EPA PD/Q&A grading descriptors - how are they acting upon this feedback?



# 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.*

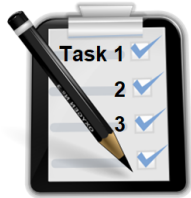
- Situation:** What were you asked to do, why and by whom? This can include regular routine activities, a collection of smaller activities on a single theme or a distinct task/project that has been set.
- Task:** The detail of what you propose to do and the plan of actions to be undertaken, with explanation as to why you have decided to do things in a certain way and why elements of the plan have be 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*).

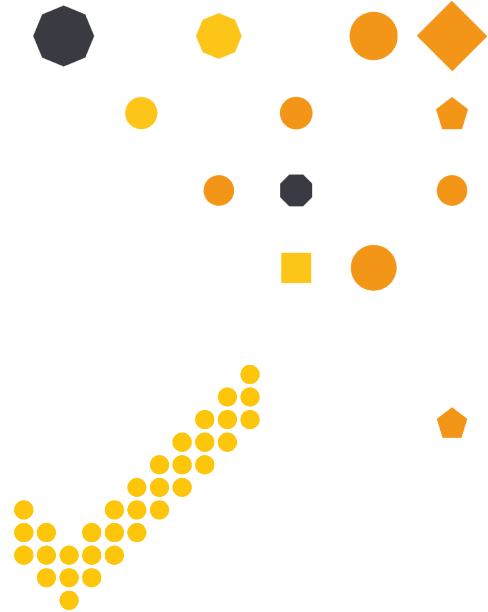


Here is the report to my manager OR not all of the activity was processed and here is my report to my manager with an action plan to remedy this.



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.*





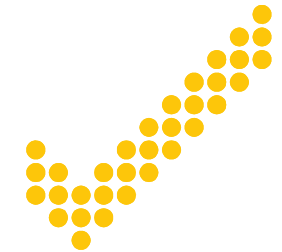
# Areas of good performance seen by IEPAs

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



# Pause for Questions



# Presentations

## Suggested approach and preparation



# Presentation – overview of requirements

The topics are published – make sure apprentices are fully aware of them while on programme

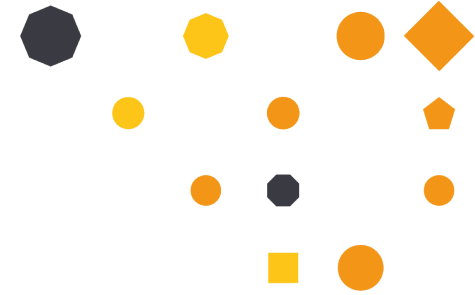
The presentation will need to provide a summary of the following:

- their role as a team leader
- what they do and how this is relevant to their role and organisation
- how they tackle current topics

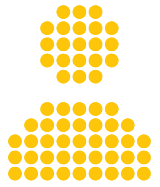
The presentation should cover the following elements:

- identification of the topic areas being covered within the presentation
- overview of the activities undertaken relating to the topic area and how these related to their role
- results of their chosen activity and the apprentice’s lessons learned
- what they achieved as a result of the activities





# 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





# Next steps

Join us for webinar 3 in the series:

Team Leader / Supervisor Assessment Plan Changes

**Webinar 3: Informal webinar responding to your questions:**

29 July, 12.00 – 13.00

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

Recording of webinar 1 is already on the website

Recording of this webinar (2) will be sent to you and posted on the website

[i-l-m.com/news-and-events/events/recordings](https://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](https://i-l-m.com/team-leader-assessment-plan)



Look out for our upcoming communications direct to your inbox



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# Thank you

