End-Point Assessment
Operations or Departmental Manager
Level 5 (V1.2) Support Pack

nqual.

C O N T E N T S

INTRODUCTION

This document sets out the requirements, advice, and guidance for the End-Point Assessment (EPA) of the Operations or Departmental Manager Level 5 apprenticeship standard. This document is designed for apprentices, employers and training providers involved within the End-Point Assessment of an apprentice studying Operations or Departmental Manager.

An apprentice for Operations or Departmental Manager should typically take up to 30 months on programme, although this may vary depending on previous experience.

This support pack is divided into sections covering all the relevant aspects of EPA for the Operations or Departmental Manager.

Should you require any further information other than the guidance in this document, please do not hesitate to contact *admin@nqual.co.uk*

Within this guide you will find references to End-Point Assessments. This information has been outlined in the Institute for Apprenticeships and Technical Education, Operations or Departmental Manager Assessment Plan. For reference, you can find this document.

Operations or Departmental Manager L5 EPA Plan (www.instituteforapprenticeships.org)

EPA TIMESCALE

Register with NQual

Training Providers should register apprentices for EPA with NQual a minimum of 90 days before assessment. Providers will pay a registration fee of £30.

Gateway

This is when the employer, apprentice and training provider confirm that the apprentice is ready for End-Point Assessment. All evidence should be uploaded to NQual a maximum of 14 weeks prior to EPA.

EPA Booking

The training provider should complete the booking section on the Gateway form or training providers can arrange the booking via ACE360. NQual will confirm booking within 48 hours.

EPA Approved

NQual will send an invoice for the remaining fee once EPA is approved.

Assessment

The apprentice will complete a Professional Discussion Underpinned by a Portfolio of Evidence and a Project Proposal, Presentation and Questioning.

Results

Results will be communicated within 10 working days of final assessment. If the apprentice passes, NQual will send details to the apprentice and training provider containing an EPA results document. If the apprentice fails, NQual will send details to the learner and training provider outlining feedback and next stages.

GATEWAY

This section outlines the requirements you must have met in order to complete the End-Point Assessment.

Once the employer is fully satisfied that you have the knowledge, skills and behaviours set out within this standard, the employer can formally confirm that you are ready for EPA via Gateway. Gateway requirements for Operations or Departmental Manager outline you must have:

- **Evidence of achieving relevant maths and English qualifications if required by funding regulations or the employer**
- **Submitted a portfolio of evidence.**
- **Submitted a project proposal title and scope (no more than 500 words)**

The Gateway form must be sent to NQual a maximum of 14 weeks before End-Point Assessment is carried out, along with the evidence listed above. NQual will confirm the project proposal's subject, title and scope meets the requirements before you begin the project.

All EPA activity will take place no later than 5 months from Gateway.

You can find the NQual Gateway form by emailing: _admin@nqual.co.uk_

THE PORTFOLIO OF EVIDENCE

As part of the apprenticeship, apprentices are required to prepare a Portfolio of Evidence which will be developed on programme to demonstrate their practice in achieving the knowledge, skills, and behaviours (KSBs) associated with the Professional Discussion.

The on-programme portfolio that will inform the Professional Discussion might include observations (key component of your portfolio), witness statement, Q&A, professional discussions, 360-degree feedback, product evidence, progress reviews and development plans (*please note that this is not an exhaustive list).

Apprentice's submission should typically be 20 pieces of evidence.

COMPONENTS OF END-POINT ASSESSMENT

The Operations or Departmental Manager Level 5 apprenticeship standard requires two distinct assessment methods, a Professional Discussion Underpinned by a Portfolio of Evidence and Project Proposal, Presentation and Questioning. The assessment methods can be taken in any order.

Professional Discussion Underpinned by a Portfolio of Evidence

This will be a two-way discussion which involves both the independent assessor and the apprentice actively listening and participating in a formal conversation to confirm their competency across all KSBs for this assessment method.

The underpinning portfolio will have been submitted at gateway and must evidence all of the KSBs mapped to this assessment method. The independent assessor will review the portfolio and can use the contents of the portfolio to identify discussion topics for the Professional Discussion.

The Professional Discussion must last 60 minutes. The independent assessor has the discretion to increase the time of the professional discussion by up to 10% to allow you to complete your last answer. Further time may be granted for apprentices with appropriate needs and reasonable adjustments.

Independent assessors will ask a minimum of 6 questions and may ask follow-up questions for clarification purposes and to allow you to cover the KSBs for this assessment method.

The Portfolio of Evidence can be referred to but is not directly assessed.

The Professional Discussion should be graded Fail, Pass or Distinction.

The Professional Discussion can take place in any of the following:

- Employer's premises
- Remotely with the agreement of you and the employer
- A suitable venue selected by NQual (for example a training provider's premises)
- Video conferencing

Project Proposal, Presentation and Questioning

There are two components to this method.

Component 1: Project Proposal

This must be carried out after apprentices have gone through the Gateway.

A Project Proposal involves an apprentice completing a relevant and defined piece of work that has a real business benefit.

Apprentices will prepare and deliver a presentation that, along with the proposal, appropriately covers the KSBs assigned to this method of assessment. It will be followed by questioning from the independent assessor.

The maximum duration of the Project Proposal should be 12 weeks. This will start once it has been confirmed that the Project Proposal Scope fulfils the requirements by NQual. This should demonstrate that the project will provide sufficient opportunity for the apprentice to cover the KSBs mapped to this method. The proposal scope is a brief summary of what the proposal is and is not assessed and should be no more than 500 words.

The Project Proposal will be 4,000 words (+/- 10% at your discretion) including tables, graphs, figures, though excluding references and annexes. Apprentices will have a maximum of 12 weeks to write and submit the proposal and the presentation following the approval of the project proposal's subject, scope, and title.

The Project Proposal may be based on any of the following:

- The need to review and implement a change plan to improve efficiency within the workplace

- The continuous improvement review of a current process, service, or product to ensure it is still fit for purpose and meets the current needs of the business

- The need to implement a direct saving across their team, department or organisation following a reforecast activity

The Project Proposal should include:

- An executive summary

- 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

The evidence provided must be valid and attributable to the apprentice; the project proposal must contain a statement from the employer confirming this.

Component 2: Presentation with Questioning

Apprentices will be given 2 weeks' notice of the presentation date to allow the independent assessor sufficient time to review the project proposal and presentation and prepare appropriate questions.

The presentation and questioning will take 60 minutes (presentation will typically last for 20 minutes, and the questioning will typically last for 40 minutes).

The presentation should be submitted at the same time as the project report.

The presentation should cover the following:

- Operational management such as business tools, management systems, identifying and overcoming barriers, identifying opportunities and interpretation of data

- Project management such as using tools and techniques to plan and deliver outcomes, approaches to identifying and managing risks.

- Finance such as monitoring budgets and financial implications

- Leading people and supporting management of change

- Building relationships

- Communication skills

- Managing self, such as 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

The independent assessor will ask a minimum of 8 questions at the end of the presentation with 1 question from each of the bullet pointed themes listed above.

The independent assessor will use the questions based on the presentation and project proposal and may also ask follow-up questions if required. They will use them to confirm their understanding of the presentation and how it demonstrates the relevant KSBs.

To deliver the presentation, you may need access to:

- Audio-visual presentation equipment

- Flip chart and writing and drawing materials

- Computer

- Any other requirements as notified on submission of the project report and presentation

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

Grading decisions will be made by the independent assessor.

PROJECT PROPOSAL & PRESENTATION TOPICS

You are required to undertake a Project Proposal and Presentation. Your proposal and presentation will be based on one of the following topics and should be of benefit to the business:

- The need to review and implement a change plan to improve efficiency within the workplace

- The continuous improvement review of a current process, service, or product to ensure it is still fit for purpose and meets the current needs of the business

- The 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

- The need to implement new business improvements based on feedback and data.

- The need to implement a new project within the organisation that contributes to strategic planning and the achievement of organisational objectives.

Proposal Guidance

Your proposal should include the following to ensure it covers the full breadth of knowledge, skills and behaviours outlined in the assessment plan:

1. An executive summary

2. An introduction

3. The scope of the proposed project (including key performance indicators)

4. Objectives

5. A project plan (including Gantt charts, risk/issue/mitigation, responsibility assignment matrix (RACI matrix))

6. How the proposed project outcomes will be achieved

7. Comment on the validity of the methods of analysis, data interpretation and data presentation used

8. Financial budgeting and resources

9. Proposed implementation plan including communications and stakeholder plans

10   Advise whether an alternative approach might be considered

11   Advise upon whether it could be completed in a more cost or time efficient manner

12   Recommendations and conclusions

Your proposal will be 4,000 words (+/- 10%) and this must include tables, graphs, and figures, however, does not include references and annexes.

Presentation Guidance

Your presentation will be 20 minutes followed by 40 minutes of Q&A. It will focus on the project proposal and MUST cover the following areas:

1   Operational management such as business tools, management systems, identifying and overcoming barriers, identifying opportunities and interpretation of data

2   Project management such as using tools and techniques to plan and deliver outcomes, approaches to identifying and managing risks.

3   Finance such as monitoring budgets and financial implications

4   Leading people and supporting management of change

5   Building relationships

6   Communication skills

7   Managing self, such as prioritising activities and time management

8   Decision making and using evaluation techniques to support the process

9   Progress of the implementation of the project proposal to date

END-POINT ASSESSMENT METHODS TABLE

The below highlights criteria that will be covered in each assessment component. Please review these details as it will provide guidance on what will be covered in each assessment component.

Learning Outcomes	What is Required	Professional Discussion, Underpinned by a Portfolio of Evidence	Project Proposal, Presentation, and Questioning
Knowledge			
Organisational Performance – Delivering Results			
Operational Management			
K1.1	Understand operational management approaches and models, including creating plans to deliver objectives and setting KPIs		✓
K1.2	Understand business development tools (e.g. SWOT), and approaches to continuous improvement.		✓
K1.3	Understand operational business planning techniques, including how to manage resources, development of sales and marketing plans, setting targets and monitoring performance	✓	
K1.4	Knowledge of management systems, processes, and contingency planning.		✓
K1.5	Understand how to initiate and manage change by identifying barriers and know how to overcome them		✓
K1.6	Understand data security and management, and the effective use of technology in an organisation.	✓	
Project Management			
K2.1	Know how to set up and manage a project using relevant tools and techniques and understand process management.		✓
K2.2	Understand approaches to risk management		✓

Finance			
K3.1	Understand business finance: how to manage budgets, and financial forecasting		✓
Interpersonal Excellence – Managing People and Developing Relationships			
Leading People			
K4.1	Know and understand different leadership styles, how to lead multiple and remote teams and manage team leaders	✓	
K4.2	Know and understand how to motivate and improve performance, supporting people using coaching and mentoring approaches	✓	
K4.3	Know and understand organisational cultures and diversity and their impact on leading and managing change	✓	
K4.4	Know how to delegate effectively	✓	
Managing People			
K5.1	Know how to manage multiple teams and develop high performing teams	✓	
K5.2	Understand performance management techniques, talent management models and how to recruit and develop people	✓	
Building Relationships			
K6.1	Understand approaches to partner, stakeholder and supplier relationship management including negotiation, influencing and effective networking	✓	
K6.2	Knowledge of collaborative working techniques to enable delivery through others and how to share best practice	✓	
K6.3	Know how to manage conflict at all levels	✓	

Communication			
K7.1	Understand interpersonal skills and different forms of communication and techniques (verbal, written, non-verbal, digital) and how to apply them appropriately.	✓	
Personal Effectiveness – Managing Self			
Self-Awareness			
K8.1	Understand own impact and emotional intelligence	✓	
K8.2	Understand different learning and behaviours styles	✓	
Management of Self			
K9.1	Understand time management techniques and tools, and how to prioritise activities and the use of different approaches to planning, including managing multiple tasks.		✓
Decision Making			
K10.1	Understand problem solving and decision-making techniques, including data analysis		✓
K10.2	Understand organisational values and ethics and their impact on decision making		✓
Skills			
Organisational Performance – Delivering Results			
Operational Management			
S1.1	Be able to input into strategic planning and create plans in line with organisational objectives		✓
S1.2	Be able to Support, manage and communicate change by identifying barriers and overcoming them		✓
S1.3	Be able to demonstrate commercial awareness and to identify and shape new opportunities		✓

| S1.4 | Be able to create and deliver operational plans, including setting KPIs, monitoring performance against plans | ✓ | |
| S1.5 | Be able to produce reports, providing management information based on the collation, analysis, and interpretation of data | | ✓ |

Project Management

S2.1	Be able to plan, organise and manage resources to deliver required outcomes		✓
S2.2	Be able to monitor progress and identify risk and their mitigation		✓
S2.3	Be able to use relevant project management tools		✓

Finance

| S3.1 | To be able to monitor budgets and provide reports and consider financial implications of decisions and adjust approach / recommendations accordingly | | ✓ |

Interpersonal Excellence – Managing People and Developing Relationships

Leading People

S4.1	Be able to communicate organisation vision and goals and how these apply to teams	✓	
S4.2	Be able to support development through coaching and mentoring and enable and support high performance working	✓	
S4.3	Be able to support the management of change within the organisation		✓

Managing People

S5.1	Be able to manage talent and performance	✓	
S5.2	Be able to develop, build and motivate teams by identifying their strengths and enabling development within the workplace	✓	
S5.3	Be able to delegate and enable delivery through others	✓	

Building Relationships			
S6.1	Be able to build trust and use effective negotiations and influencing skills and manage conflict	✓	
S6.2	Be able to identify and share good practice and work collaboratively with others both inside and outside the organisation	✓	
S6.3	Be able to use specialist advice and support to deliver advice against plans		✓
Communication			
S7.1	Be able to communicate effectively (verbal, nonverbal, written, digital) and be flexible in communication style		✓
S7.2	Be able to chair meetings and present using a range of media	✓	
S7.3	Be able to use active listening and challenge and give constructive feedback	✓	
Personal Effectiveness – Managing Self			
Self-Awareness			
S8.1	Be able to reflect on your own performance, working style and its impact on others	✓	
Management of Self			
S9.1	Be able to create a personal development plan,	✓	
S9.2	Be able to use of time management and prioritisation techniques		✓
Decision Making			
S10.1	Be able to undertake critical analysis and evaluation to support decision making		✓
S10.2	Be able to use of effective problem-solving techniques		✓

Behaviours			
Takes Responsibility			
B1.1	Drive to achieve in all aspects of work	✓	
B1.2	Demonstrates resilience and accountability	✓	
B1.3	Determination when managing difficult situations	✓	
B1.4	Seeks new opportunities	✓	
Inclusive			
B2.1	Open, approachable, authentic, and able to build trust with others	✓	
B2.2	Seeks views of others and values diversity	✓	
Agile			
B3.1	Flexible to the needs of the organisation		✓
B3.2	Is creative, innovative, and enterprising when seeking solutions to business needs		✓
B3.3	Positive and adaptable, responds well to feedback and need for change	✓	
B3.4	Open to new ways of working		✓
Professionalism			
B4.1	Sets an example and is fair, consistent, and impartial	✓	
B4.2	Open and honest	✓	
B4.3	Operates within organisational values	✓	

GRADING & CRITERIA

Grades allocated for each component will be Fail, Pass and Distinction. In order to achieve a Passing grade, the apprentice must gain a minimum of a Pass in all components of the End-Point Assessment. To achieve an overall EPA Distinction, the apprentice must achieve a Distinction in both assessment methods.

Grading results will be communicated to you within 10 working days of completion of the final component.

The final grade will be decided on the following combinations:

Assessment Method 1: Professional Discussion Underpinned by a Portfolio of Evidence	Assessment Method 2: Project Proposal, Presentation and Questioning	Overall grading
Fail	Any Grade	Fail
Any Grade	Fail	Fail
Pass	Pass	Pass
Pass	Distinction	Pass
Distinction	Pass	Pass
Distinction	Distinction	Distinction

Criteria for the Professional Discussion Underpinned by a Portfolio of Evidence

KSBs.	Pass Descriptors	Distinction Descriptors	Guidance Notes
Operational Planning & Management K1.3, K1.6, K4.3 S1.4, S4.1 B1.1, B1.2, B1.4	Describes how they used their knowledge and understanding of data security and business planning techniques, to support their organisation in creating and delivering operational plans, which include setting targets and monitoring performance against plans. (K1.3, K1.6, S1.4) Explains how they communicated their team's role in their organisation's vision and goals, and how they used their knowledge of the impact that organisational culture and diversity has on leading and managing change to drive, achieve and deliver operational plans. (K4.3, S4.1, B1.1) Describes when they have shown resilience and accountability when seeking new opportunities for their organisation. (B1.2, B1.4)	Justifies the purpose of operational business planning and sales and marketing plans, and why they manage resources by setting key targets and monitoring performance against them. (K1.3)	**Pass** Demonstrates knowledge of data security and management through effective use of technology, along with how this is relevant to operations management. Knowledge of at least two business planning techniques (could include RACI, Risk Analyses, PESTLE, SWOT analyses, and/ or techniques that are unique to the organisation and clearly relevant for business planning, such as the Ofsted report and the SIP in an education setting). How the knowledge of the above has been used to support with creation, delivery, and monitoring of operational plans (components of operational plans could include objective setting, KPIs, reporting mechanisms, resources, timescales, accountabilities, tasks, and quality). Understanding of what organisational culture and diversity are and how they impact on leading and managing change and delivering operational plans (no specific theory is required but could include change models such as Kotter or The Change Curve, and culture theory such as Schein or Handy). Skilled to communicate organisational vision and goals so that the team understand how they apply to them.

			Example of showing resilience and accountability and of seeking new opportunities.
			Distinction
			A justification of the purpose of operational business planning and sales and marketing plans, using an example from their own organisation. The justification should include how the outcome of these plans would positively impact the organisation. The importance of managing resources for these plans is explained, along with how they are managed.
			Portfolio evidence could include but is not limited to; written accounts to show knowledge elements, WP to show use of business planning and goal-setting techniques, communications, marketing, and sales.
Managing Teams K4.1, K4.2, K4.4, K5.1, K5.2 S4.2, S5.1, S5.2, S5.3 B2.1	Evaluates different leadership styles, methods to lead multiple and remote teams, manage team leaders, and explains how they have adapted their preferred style to ensure they are open, approachable, and able to build trust. (K4.1, B2.1) Discusses how they have recruited, developed, or managed team members, and explains the performance management techniques and talent management models that underpin this. (K5.2, S5.1)	Analyses the problems associated with managing multiple teams and can describe known strategies for dealing with them. (K5.1) Analyses the effectiveness of different coaching and mentoring techniques that they used for office-based and remote team members and justifies their use of the techniques. (K4.2, S4.2)	**Pass** Evaluation of a minimum of 2 leadership styles and how they adapt the style appropriately to suit the situation or individual. Methods could include situational leadership, communication techniques and use of technology to manage remote teams. Examples of recruitment, development, OR performance management techniques (minimum of 2 examples). Performance management techniques could be formal and/ or informal, such as objective setting, appraisals, performance dashboards and ways of identifying development needs.

	Identifies strengths in their team and adopts coaching and mentoring techniques to develop, build, enable and motivate the team and support high performance working. Uses delegation to enable delivery through others and describes strategies to manage multiple teams. (K4.2, K4.4, K5.1, S4.2, S5.2, S5.3)		Development approaches could include coaching and mentoring, improvement plans and training. How talent management models (such as Bersin, Drotter or in-house talent management approaches) underpin the above. Coaching and mentoring techniques are used for developing the team towards high performance. Delegation is used appropriately. Evidence of effectively managing multiple teams. **Distinction** Analysis is given of the problems that can occur when managing multiple teams and a minimum of 2 effective and known strategies are explained (no theory required). Coaching and mentoring techniques that have been used are analysed with a justification of how they were effective in the given situation. Portfolio evidence could include but is not limited to; WP to show the development of team members, written accounts to support knowledge.
Communication Skills K6.1, K6.2, K6.3, K7.1 S6.1, S6.2, S7.2, S7.3 B1.3, B2.2, B3.3	Describes how they used interpersonal skills including active listening, when challenging and giving constructive feedback and seeking the views of others ensuring they valued diversity. Describes when they effectively used different forms of communication when chairing meetings or presenting. (K7.1, S7.2, S7.3, B2.2)	Evaluates known influencing and negotiating theories and models and the effectiveness of these within their organisation when managing the supplier relationship. (K6.1) Analyses barriers to communication and how they are overcome. (K7.1)	**Pass** Understanding and application of various communication and interpersonal skills. This should include giving feedback, seeking views from others, and showing that diversity is valued by them. Example of positively responding to feedback given to them.

	Describes when they have been able to build trust and effective relationships when identifying and sharing good practice while working collaboratively both within their organisation and externally. Explains how they used effective negotiation and influencing skills and demonstrated determination to manage conflict. (K6.1, K6.2, K6.3, S6.1, S6.2, B1.3) Justifies how they remained positive and adaptable when responding to feedback in the need for change. (B3.3)		Examples of managing conflict and using influencing and negotiating skills. Example of how they work collaboratively towards best practices, internally and externally. Evidence of positive and trusting work relationships. **Distinction** More than one known theory and/ or model is required for an evaluation (negotiation models and techniques could include -win-win, RADPAC Model, Kilmann. Negotiation styles taken from the models could include collaboration, accommodating, and compromising. Influencing models could include Push/Pull model, McKinsey. Conflict management models and styles could include Kilmann, Problem-Solving Cycles, Interest-Based Relational Approach). Detail of the effectiveness of using the theory or model when managing supplier relationships. A minimum of 2 barriers to communication are analysed and relevant approaches to overcoming them are known. Portfolio evidence could include but is not limited to; Samples of feedback, written accounts, work product evidence.
Personal & Professional Development K8.1, K8.2 S8.1, S9.1 B4.1, B4.2, B4.3	Explains how they used their knowledge of their own learning and behavioural styles, to create their own personal development plan. (K8.2, S9.1) Reflects on their own performance, working style and emotional intelligence and the impact they have had on others. (K8.1, S8.1)	Evaluates a range of known learning styles in different situations. (K8.2)	**Pass** Self-awareness of their learning style and behaviours is shown. This should be reflected in planned development actions. Ability to give a reflective account of own performance, working style, EI, and impact on other people.

	Describes how they operate within their organisation's values and are a role model who sets an example to others by being open, honest, fair, consistent, and impartial. (B4.1, B4.2, B4.3)		Examples of organisational values and how they work in alignment with these. **Distinction** Knowledge of known learning styles must be shown (could include styles taken from Honey and Mumford, VARK, Felder-Silverman), with an evaluation of at least 2, showing how they can be applied to different situations. Portfolio evidence could include but is not limited to; a personal development plan, evidence of performance, CPD logs, self-assessments, and reflective accounts (only permitted for K8.1) and feedback. Written accounts to support knowledge of learning and behaviour styles.

Criteria for the Project Proposal, Presentation & Questioning

KSBs.	Pass Descriptors	Distinction Descriptors	Guidance Notes
Planning their Project Proposal K1.1, K1.2, K1.4, K10.2 S1.1, S1.3, S4.3 B3.1, B3.2	Describes business development tools, management systems and contingency planning that are available when they have supported the management of change or identified and developed new opportunities within their organisation whilst ensuring commercial awareness. (K1.2, K1.4, S1.3, S4.3) Uses operational management approaches and models in strategic planning that create plans that meet organisational objectives. (K1.1, S1.1) Shows how they are flexible, creative, innovative, and enterprising when seeking proposed solutions to business needs. (B3.1, B3.2) Explains their organisational values and ethics, and the impact these have on their decision making. (K10.2)	Analyses a range of business development tools that assist with project planning, and the techniques and approaches for continuous improvement, and how these tools and approaches align with their organisational systems, processes, and plans. (K1.2)	**Pass** A minimum of 2 business development tools and a recognised or internal management system are described, along with how they are used to support change, or identify new opportunities (Management systems could include 6 Sigma, McGregor, change management theory, managing by objectives, utilising processes, and contingency planning. Business development tools could include PESTLE, SWOT, Work breakdown structures, Critical Path Analysis, or internal tools such as SIP, Ofsted reports in an education setting). A minimum of 2 operational management approaches and/or models for strategic planning have been used for strategic planning that are translated into organisational objectives (could include Balanced Scorecards, Porter's 5 Forces, Gap Analysis, Adair). Flexibility, creativity, innovation, and an enterprising approach are shown within the planning of the proposal. **Distinction** A minimum of 3 business development/ continuous improvement tools/ techniques are analysed, showing how they have supported with project planning.

			The tools and approaches should be suitable for the context of the organisation.
Delivery of their Project Proposal K1.5, K2.1, K2.2, K9.1, K10.1 S1.2, S2.1, S2.2, S2.3, S7.1, S9.2, S10.1, S10.2	Uses project management tools to plan, organise and manage resources in order to deliver the required outcomes to plan their project. Identifies and mitigates risks and includes suitable systems to monitor progress of the project proposal. (K2.1, K2.2, S2.1, S2.2, S2.3) Applies time management tools and techniques and different approaches to planning in order to prioritise activities. (K9.1, S9.2) Undertakes a critical data analysis to understand and inform their decision making and approach to problem solving. (K10.1, S10.1, S10.2) Uses various forms and styles of communication effectively which are suitable for the audience and situation. (S7.1) Evaluates how they support, manage, and communicate change and how they have overcome the barriers they identified. (K1.5, S1.2)	Analyse and evaluate the effectiveness of the project management tools and problem-solving techniques used in the planning of the project proposal. (S2.3, S10.2)	**Pass** A minimum of 2 tools have been used to plan, manage, and monitor resources and progress for the project (could include SWOT, WBS, CPA, SMART, Gantt charts, Plan on a Page, RACI matrix). Risks are identified and mitigated where possible, with ongoing monitoring plans in place (risk analysis could be evidenced, but is not mandated, could include Fishbone, risk matrix, urgency assessment, sensitivity analysis). A minimum of 2-time management tools/ techniques are utilised effectively for prioritising (could include Urgent Important matrix, Pomodoro, Pareto, Gantt, Plan on a Page). Evidence of data analysis, looking critically at the outcomes and using them to inform decision-making and problem-solving (recognised models are not required but could include RCA, Pareto, Fishbone, Decision Trees). Data can be primary or secondary and trends and patterns should be noted, with conclusions on how this impacts the proposal. Evidence of various communication approaches which are suited to the audience and situation. A minimum of 2 communication barriers (in a change situation) are identified and overcome

			successfully. An evaluation of their approach to managing and communicating change is given. **Distinction** An analysis of a minimum of 2 project management tools and/ or problem-solving techniques that have been used, with evaluation of their effectiveness.
Project Proposal Output **K3.1** **S1.5, S3.1, S6.3** **B3.4**	Provides reports and management information that details the management of their project proposal's budget appropriately considering the financial implications of their decisions and adjusts their approach or recommendations accordingly. (K3.1, S1.5, S3.1) Uses specialist advice and shows a willingness to be open to new ways of working. (S6.3, B3.4)	Justifies the use of specialist advice and evaluates the impact of the advice on the project proposal. (S6.3) Justifies and evaluates the financial and budgetary recommendations identified within the project proposal. (S1.5, S3.1)	**Pass** Evidence of having provided reports to their stakeholders, informing details of the proposal budget. Clarity on the financial implications of their budgeting decisions. Examples of how and why budget decisions/ recommendations have been adjusted. Examples of being open to new ways of working, and utilising specialist advice to support the project. How the specialist's advice had an impact. **Distinction** Full justification of using the specialist advice, with an evaluation of what the advice brought to the project, including more than one benefit/ impact. The approach taken to the budget and finances is evaluated. The approach taken can be justified.

Re-sit / Re-take

If an apprentice Fails one or more component, they will be offered the opportunity to re-sit / re-take the component(s). It is then up to the apprentice's employer how many attempts an apprentice is given.

The timescale for a re-sit typically takes 3 months and a re-take 6 months (dependent on how much re-training is required). All assessment methods must be taken within a 6-month period, otherwise the entire EPA will need to be resat / retaken.

Where any assessment method must be re-sat or re-taken, the apprentice will be awarded a maximum EPA grade of Pass. Re-sits and re-takes are not offered to an apprentice wishing to move from Pass to a higher grade.

MOCK PROFESSIONAL DISCUSSION

It is the responsibility of the employer and training provider to complete Mock Professional Discussions with apprentices and it is the responsibility of the apprentice to ensure that they have practiced answering questions for the End-Point Assessment.

Professional Discussion materials will be given to the training providers when registering learners with NQual.

A Mock Professional Discussion should take a maximum of 60 minutes.

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