

End Point Assessment (EPA) Guide to EPA

*Learning & Development
Consultant Business Partner*

Level 5 Apprenticeship Standard

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Section 1: Introduction

This document is for apprentices, employers and training providers who are contracted with the CIPD for EPA of the level 5 L&D Consultant/ Business Partner Apprenticeship. This is:

- apprentices who are registered with the CIPD to undertake EPA
- employers who intentionally selected the CIPD to conduct EPA for their apprentice/s
- training providers who signed the CIPD's EPA contract agreement on behalf of an employer.

This guide will cover information about the CIPD as an EPA organisation and details about the EPA activities, including:

- Preparing for EPA
- The EPA Activities
- Completion of EPA
- Resources

Section 2: About the CIPD as an EPA Organisation

The CIPD is an independent third-party organisation registered on the Education and Skills Funding Agency's Register of EPA Organisations for the L&D Apprenticeship standards.

Our assessment processes have been developed to provide rigorous, robust and independent EPA so that we can give employers confidence that apprentices completing an apprenticeship standard with the CIPD can actually perform in the occupation they have been trained in and can demonstrate the duties, knowledge, skills and behaviours (KSBs) set out in the apprenticeship standard.

There are two levels of L&D apprenticeship standards:

- Level 3 L&D Practitioner
- Level 5 L&D Consultant/Business Partner.

Section 3: The Level 5 L&D Consultant/Business Partner Apprenticeship Structure

Apprenticeship Title: L&D Consultant/Business Partner

Apprenticeship Standards: the knowledge, skills and behaviours (KSBs) required to carry out the job of an L&D Consultant/Business Partner:

<https://www.instituteforapprenticeships.org/apprenticeship-standards/learning-and-development-consultant-business-partner/>

Apprenticeship Level: this is a level 5 apprenticeship

On-Programme Training Duration: minimum 12 months (typical 18 months)

On-Programme Training: The training for the L&D apprenticeship standard is designed to prepare the apprentice for end point assessment. Throughout the training programme the apprentice will gain technical knowledge, practical experience and the wider skills and behaviours required for the occupation. The training programme should be structured and delivered with the active involvement of the employer. It should include formal off-the-job training and planned on-the-job opportunities to practise new skills in the real work environment.

Job titles and work tasks can differ from employer to employer but one fundamental aspect of the apprenticeship is that all L&D Consultant/Business Partners must be given the necessary work activities that will allow them to contextualise their training, develop their competence and prepare for end point assessment.

The employer will hold regular one to one and performance management meetings to help the apprentice to progress. This should include feedback and development guidance specifically aligned to the apprenticeship standard. The Training Provider can support this by ensuring the employer is clear on the requirements of the apprenticeship and fills any gaps (identified by the employer) with off-the-job training for the apprentice. It is important for the employer and training provider to build regular check points into the design of the apprenticeship programme to ensure development milestones are on target. It is the shared responsibility of the training provider and the employer to ensure an apprentice is ready for EPA, although the employer will make the final decision.

The EPA: is the final assessment for an apprentice to ensure they can do the job of an L&D Consultant/Business Partner. There are two complementary methods which must be completed in the following order:

EPA1 – work-based project with professional discussion
EPA2 – presentation and QA based on a learning journal.

EPA Duration: 5 months (maximum).

Section 4: Preparing for EPA

Starting with the Learning Journal

The learning journal is a *compulsory* document to be created at the start of the on-programme training for the apprenticeship. It is developed throughout on-programme training and must be completed when the apprentice is ready for EPA.

The apprentice is encouraged to be creative in the way they record their learning in the journal and may present it to the CIPD in any method or format they consider suitable. It is to be designed as a record which marks significant learning against the KSB aligned to EPA 2 that have taken place on-and-off the job throughout the apprenticeship duration. The learning journal sets the precedent for continuous professional development and allows the apprentice to:

- reflect
- use critical thinking skills

- analyse their experiences
- improve their performance.

There is free rein on the method and format used to create the learning journal but, as the learning journal feeds into the EPA activity, the apprentice should be encouraged to consider how they'll showcase their best examples of work in preparation for submission to their independent assessor.

In addition to reflection on personal development the journal must include the following themes:

1. New and Emerging Trends and Developments in the L&D Sector
2. L&D Specialisms and their Business Impact
3. Leadership

Hints and Tips:

- The learning journal must include a table of contents and a regularly updated summary document – such as a heatmap
- The frequency of learner journal entries must be visible on the summary document and show 'regular' appraisal of the learning journey - regular means approximately every four weeks
- Whatever format is used for presenting the learning journal, evidence must be ordered, dated, referenced, linked to the KSBs and easy for the independent assessor to locate and follow
- Both on-and-off the job training examples must be highlighted
- Reflective practice: 'is the ability to reflect on one's actions so as to engage in a process of continuous learning' – Wikipedia
- Apprentice's may want to use or adapt a reflection model/theory to present their reflective learning, well-known models include: Driscoll, Kolb, Gibbs
- A record of consent must be included with evidence, such as photographs, recordings or articles which include any person other than the apprentice
- The apprentice will use their learning journal later on (in EPA 2) to design a presentation
- The apprentice must highlight in the learning journal one of their best examples that demonstrate each of the key themes to be showcased for the independent assessor in the presentation and linked with EPA2 to illustrate KSBs according to the assessment requirements
- The employer must sign-off the learning journal as a true and accurate representation of the apprentice's work and confirmation the apprentice is competent against the KSBs.

The Gateway

The Gateway is confirmation the apprentice has met the requirements of the L&D Consultant/Business Partner standard and is ready to move on to end point assessment. It happens when the on-programme training is complete and the apprentice is consistently demonstrating the specific KSBs required for the occupation. The decision as to when the apprentice is ready to move on to EPA will be made by the employer (supported by the training provider).

During the Gateway the employer must validate and sign all relevant supporting evidence. Working with the apprentice, the employer will finalise the plans and confirm how the assessment activities will be managed within the EPA timeline.

Conditions for passing the Gateway include:

- confirmation the on-programme training lasted a minimum of 372 days
- attainment of level 2 English and Maths qualifications (or equivalent)
- a complete and signed off learning journal (confirmation of occupational competence)
- a work-based project plan using the template provided by the CIPD
- a proposed date for the professional discussion in EPA 1, as well as the presentation and Q&A session in EPA 2 (in 5 months)
- Permission from the apprentice for the recording of the professional discussion, presentation and questioning and for the CIPD to apply for the apprenticeship certification on their behalf.

Ready for EPA

Once the employer has confirmed the apprentice is ready to move on to EPA and all the supporting gateway evidence has been submitted to the CIPD, the CIPD has seven days to check the evidence and approve readiness for EPA.

The EPA timeline begins as soon as the CIPD confirms readiness.

The apprentice will be deemed not ready for EPA and the timeline may be delayed if:

- the on-programme training is less than 372 days
- English and Maths credentials are not covered within the Education and Skills Funding Agency's (ESFA) guidance on the Gateway requirements or other supporting evidence endorsed by the ESFA
- the learning journal is not accessible, has not been signed off by the employer, is not supported with a table of contents and summary document (such as a heat map)
- the work-based project plan template was not used; is incomplete; not signed by the employer and apprentice; appears unrealistic; exceeds the timeline permitted; project appears to be simulated
- the consent forms have not been signed and submitted.

Section 5: The EPA Activities

EPA1 - The Work-Based Project with Professional Discussion

This assessment method has two components and must be taken before EPA2.

Component One - The Work-Based Project

The first component of this assessment is the work-based project. The apprentice will begin this assessment as soon as they've passed the gateway. They must show methodical application of tasks according to the timeline on the work-based project plan. This is a real substantive piece of work which will demonstrate L&D consultancy skills and cover how the apprentice dealt with a significant issue facing the business/sector.

:

- It cannot be simulated

- It must be achieved in a real work environment and in role
- It will be planned with EPA in mind so the apprentice must utilise all opportunities for gathering evidence for the KSBs
- It will require significant research, both inside the organisation and into the learning and development profession to demonstrate breadth of understanding and the application of how the project research supported the project decisions and outcomes.
- It should describe what the apprentice did, how they did it and the recommendations and outcomes that resulted from the project.

Formal Business Report

The work-based project is written in the format of a formal business report and must be submitted to the CIPD no later than the agreed date articulated by the apprentice and employer in the work-based project plan.

- The wordcount is 5000 words +/- 10%
- The template must be used for the final submission
- The written report should describe how the project was delivered, it will focus on the actions and decisions taken, critical analysis of the research undertaken and the outcomes achieved
- The formal business report must describe how the apprentice:
 - analysed the business-related problem or objective. This should include demonstrating significant consulting with relevant business stakeholders to understand the requirements of the business/team
 - conducted relevant background research. This may involve researching business requirements/implications, L&D/industry developments and any regulatory requirements, including relevant data analysis and budgetary/resource considerations
 - researched and developed options for potential solutions, giving reasoned explanations as to their inclusion or rejection
 - collaborated and consulted with colleagues and the business with the development of the agreed solution
 - developed the Project plan with relevant solutions looking for impacted populations and implementing change management actions as appropriate
 - implemented the solution
 - evaluated the solution against the agreed criteria from stakeholders
 - evaluated the solution and identified lessons to be learnt and the factors to be improved upon for next time.
- Appendices are not included in the word count and should only be provided as tangible evidence of how the project was delivered and the outcomes that were achieved.
- The final submission must be received by the CIPD no later than five months from the EPA start date and according to the agreed date given on the project plan's timeline.

Component 2 - Professional Discussion

The professional discussion takes place one month after the executive summary report has been completed. It will be a two-way formal conversation between the apprentice and an independent assessor, conducted via remote video conferencing. The professional discussion assesses the apprentice's in-depth understanding of the work-based project undertaken. It allows the apprentice an opportunity to make detailed and proactive contributions reinforcing their competency across the KSBs mapped to this assessment. It will:

- last 75-minutes (+/- 10%)
- consist of 10-12 open questions

- include follow up probing questions for clarification to underpin the content of the project, the evidence provided and the apprentice's overall understanding of what they have delivered in the project
- seek to assess the KSBs mapped to this assessment component that are not sufficiently evidenced through the project
- provide an opportunity for the apprentice to demonstrate depth of understanding and perform against the distinction criteria.

Apprentices may refer to their formal business report and the evidence contained within the appendices throughout the professional discussion.

EPA 2 – Presentation and Q&A Based on the Learning Journal

EPA 2 usually takes place on the same day after the professional discussion for EPA 1 via video conferencing. This will be five months from the EPA start date and one month after the submission of the formal business report. There are also two components for EPA2.

Component One - The Presentation

The presentation provides the apprentice with an opportunity to demonstrate attained KSB, in particular around lessons learned. It is the apprentice's responsibility to select the most appropriate delivery method/s for their presentation and ensure compatibility with the CIPD video conferencing facility.

- The presentation must last 25 minutes (+/-10%)
- It will cover one or more of the apprentice's best competency-based examples from their learning journal that demonstrate: each of the key themes:
 1. New and emerging trends and developments in the L&D sector
 2. L&D specialisms and their business impact
 3. Leadership
- Apprentices should refer to the KSB within the standard mapped to this particular assessment method
- The delivery of the presentation and content will be assessed according to style, clarity and communication (as required by the standard).

Component Two - The Q&A Based on the Learning Journal

The presentation is followed by a Q&A session with the independent assessor.

- The Q&As will last 35-minutes (+/- 10%)
- There will be 5-7 open questions
- Additional probing questions may be asked for clarification, to test the presentation content and underpin the components of the learning journal, highlighted by the independent assessor as needing further investigation
- Questions will seek to assess the KSBs mapped to this assessment component and not evidenced sufficiently through the presentation
- Questions also provide an opportunity for the apprentice to demonstrate depth of understanding and performance against the distinction criteria.

Note: It is the responsibility of employer to ensure the assessments are administered in an environment suited to assessment conditions. Attention must be paid to noise levels in the room where the assessment is to be conducted, whether internal or external, intermittent or continuous. A quiet room with the appropriate system requirements for a remote assessment must be provided. The apprentice must not be interrupted for the full duration of the assessment/s. Enough time must be allowed for preparation, closing down and any technical glitches that may

need to be sorted out. Technology must be checked before the day to ensure it is in full working order. There should be no other people with the apprentice during the assessment and the apprentice must not talk to or attempt to communicate with anyone else during the assessment unless alternative arrangements have been put in place beforehand.

Section 6: Completion of EPA

The Independent Assessor will not inform the apprentice of the EPA outcome. The EPA overall grade and feedback is sent from the CIPD to the apprentice within **approximately** two weeks from the assessment date.

Overall Grades

There are four possible overall grades: fail, pass, merit and distinction.

EPA1	EPA2	Overall Grade
Fail in one or both methods		Fail
Pass	Pass	Pass
Pass	Distinction	Pass
Distinction	Pass	Merit
Distinction	Distinction	Distinction

A premium has been placed on EPA1. This means that a distinction must be achieved for an overall merit or distinction.

EPA Re-sits

If an apprentice fails one EPA method, they have the opportunity to re-sit the failed assessment. A re-sit does not require further learning. A re-sit will also be graded: fail, pass, merit and distinction. There are no limits to grades on re-sits but an apprentice is not allowed to re-sit as an opportunity to move up to a higher grade. Re-sits are chargeable to the employer at £630 and can only be taken with the employer's written agreement to cover the cost.

EPA Re-take

If an apprentice fails both assessments, they will be required to re-take the EPA in full (with no limits to grades). A re-take requires completion of the full EPA (both assessments again) following a period of further learning with a supportive action plan. Re-takes are also taken at the employer's discretion and will be chargeable to the employer at the full EPA cost of £1260. They can only be taken after the employer has agreed a re-take action plan and timeline with the apprentice and the CIPD is in receipt of written agreement from the employer to cover the cost.

Certification

The Education and Skills Funding Agency (ESFA) operate the process for issuing apprenticeship certificates on behalf of the Secretary of State. The CIPD will request the apprenticeship certificate from the ESFA once an apprentice has successfully achieved all components of their EPA. As part of this, the CIPD must ensure the apprentice has given their permission for us to apply for certification on their behalf.

Applying for CIPD Professional Membership

Apprentices who successfully complete their EPA with the CIPD will be eligible for *Associate Professional Membership of the Chartered Institute of Personnel and Development*. Apprentices can complete a membership application form, found in our EPA toolkit. Once complete it must be returned to MyEPA@CIPD.co.uk (with payment at the standard rate for CIPD membership). The Associate Membership application will be processed by the CIPD and the apprentice will be awarded with their professional membership status and exclusive member benefits (see: <https://memberbenefits.cipd.co.uk/associate-member/>).

Section 7: Resources

The CIPD has a range of documents to support our EPA activities. These documents contain the information published by the Trailblazer Groups plus additional guidance around preparing and taking EPA. All documents must be read in full prior to booking EPA. The documents are detailed below:

- **The CIPD EPA Policies** – The CIPD Equality, Diversity, Inclusion, Safeguarding and Prevent Policy (EPA), Data Protection Policy, Data Processing for the Provision of EPA Services by CIPD as the EPA Organisation, The CIPD reasonable adjustments and special considerations Policy (EPA), The CIPD Complaints Policy and Procedure for EPA Post Gateway, The CIPD Appeals and Enquiries policy (EPA), The CIPD Re-sit and Re-take Policy (EPA), The CIPD Appeals Policy (End Point Assessments).
- **Information Published by the Trailblazer Group** - Apprenticeship Standard and EPA Assessment Plan
- **The CIPD EPA Toolkit** – The L&D Consultant/Business Partner Specifications, A Guide for EPA, Learning Journal Declaration form, Work-based Project Plan, Executive Summary Report Template, Grading Amplification, Assessment Recording Document, Professional Discussion Guide, Presentation and Questioning Guide, CIPD Professional Membership Application Form.