



Toolkit
SENIOR PEOPLE PROFESSIONAL
Level 7



end-point assessment and so much more

INTRODUCTION

DSW has been appointed to conduct end-point assessment for this apprenticeship. This Toolkit has been created to help the apprentice, training provider and employer understand what is needed to successfully complete end-point assessment (EPA) for this standard.

All approved end-point assessment organisations must carry out EPA in line with the assessment plan published by Skills England. The assessment plan details the assessment methods used, the descriptors to be assessed and the environment in which the assessments must take place.

The requirements and content of this Toolkit come directly from the Senior People Professional assessment plan with additional clarification provided by the external quality assurer (EQA) for this apprenticeship standard. Published assessment plans are available on the Skills England website: skillsengland.education.gov.uk

The standard aligns with recognition by the CIPD for Chartered Membership.



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GATEWAY

Apprentices must be on-programme for a duration in line with Department for Education (DfE) requirements before they come through gateway and enter the EPA phase of the apprenticeship. The apprentice, employer and training provider must agree that the apprentice is demonstrating competence against the standard's knowledge, skills and behaviours (KSBs) and the associated grading descriptors.

Once an apprentice is ready for gateway, the training provider must submit the following to DSW's Proficient (previously epaPRO) portal for approval:

- Gateway Declaration
- proof of Level 2 English and maths*
- Portfolio Template
- Project Proposal Summary Template
- Apprenticeship Upgrade Form and CV

**DfE exemption rules apply.*

If any of these requirements are not met, gateway will not be approved.



EPA OVERVIEW

The Senior People Professional EPA consists of two assessment methods:

- Project Proposal, Presentation and Questioning
- Professional Discussion underpinned by Portfolio of Evidence

The pathways for this standard are Organisational Development, Learning and Development and Human Resources.

For the Organisational Development pathway, there are 20 pass and eight distinction descriptors.

For the Learning and Development and Human Resources pathways, there are 21 pass and nine distinction descriptors.

Further information can be found in the [*Amplification*](#) document.



EPA TIMELINE

Typical five-month duration



- The assessments can take place in any order or concurrently - there is no need to pass one assessment method before progressing to the other
- The components of the Project Proposal, Presentation and Questioning must be completed in the order as stated in the timeline above and meet the deadlines outlined
- The live assessments may take place on the same day or on different days

PLANNING MEETING

Following gateway approval, DSW's Independent End-Point Assessor (IEPA) will contact the training provider to introduce themselves and arrange a planning meeting. Apprentices and employers are permitted to join the planning meeting if they request to do so.

This meeting will be used to agree the dates and times for the assessments.

The assessments will be conducted virtually via the online video conferencing platform Microsoft Teams. Others, such as Webex or Zoom can be used if preferred.

Face-to-face assessments can be accommodated should the apprentice prefer. This should be discussed with the training provider and agreed with DSW. Additional costs will apply.

The IEPA will record the agreed submission and assessment dates in Proficient once the planning meeting is complete.



CONDITIONS FOR ASSESSMENT

All assessments must be taken under examination conditions. It is essential that apprentices familiarise themselves with the *Conditions for Live Assessments*. The document sets out the mandatory requirements to ensure a secure and appropriate assessment environment, including apprentice ID requirements, panning of rooms and appropriate use of technology.

Failure to comply with the conditions for live assessment may result in delayed, cancelled or failed assessments.



AMPLIFICATION AND MAPPING

The *Amplification* outlines what the apprentice will be assessed against in each assessment method.

During the on-programme period, the apprentice will cover the knowledge, skills and behaviours (KSBs) of the apprenticeship standard. The apprentice is not assessed against the KSBs; these have been used to create the pass and distinction descriptors.

The apprentice's competence will be assessed against the pass (P) and distinction (D) descriptors during end-point assessment.

Amplifications are written to expand on the pass and distinction descriptors. This simplifies and clarifies any complex, vague and/or ambiguous areas. Where examples have been listed, these are designed to provide guidance to the apprentice. The list is not exhaustive, and the apprentice may use alternative examples that are relevant to their role.



PROJECT PROPOSAL, PRESENTATION AND QUESTIONING



The project proposal is a relevant and defined piece of work that has real business benefit. It should be designed to ensure that the apprentice's work meets the needs of the business, is relevant to their role and allows the descriptors to be assessed.

The apprentice has a maximum of 12 weeks in which to undertake their project and submit their project report, presentation materials and referencing table to DSW.

The 12-week period commences as soon as gateway has been approved. Starting the work ahead of this will invalidate the assessment.

PROJECT PROPOSAL SUMMARY

The title and scope of the project proposal should be decided by the apprentice and the employer to ensure that it meets a genuine business need. The proposal could be based on areas such as:

- the need to review and agree a change plan to improve a people solution 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 planning and design of a project that has strategic relevance and the potential to add value to the organisation.

A summary of the project proposal should be submitted at gateway using the *Project Proposal Summary Template*. This should be no more than 500 words and should outline the title and scope of the proposal. It must be signed by the employer to confirm that it has real business application.

In order to help the apprentice and employer identify a suitable project, the *Project Proposal Summary Template* includes a mapping table to identify how evidence might be created for each of the grading descriptors assessed by this method. Although it is not mandatory to complete the mapping, it is strongly recommended.

The IEPA will review the template and either approve or reject it within two working days. Gateway will not be approved until the IEPA has signed off the title and scope.

The proposal does not need to be fully implemented during the EPA period but must be a comprehensive project proposal that will enable full implementation at an appropriate time for the organisation.



PROJECT PROPOSAL REPORT

The apprentice must complete a project report which must include:

- an executive summary
- an introduction
- the scope of the proposed project (including key performance indicators)
- the objectives
- how the proposed project outcomes would be achieved
- comment on the validity of the methods of analysis, data interpretation and data presentation used
- a proposed implementation plan including communications and stakeholder plans
- advise whether an alternative approach might be considered
- recommendations and conclusions.

Reports must be between 6,300 and 7,700 words. If a report exceeds the maximum word limit, only the first 7,700 words will be assessed. Reports under 6,300 words will be assessed.

The apprentice must complete their project proposal unaided. Where the apprentice works with others, for example when consulting with stakeholders, they should use their presentation to evidence the knowledge and skills they utilised and to explain the contribution made by others.

Further information can be found in [*DSW Evidence Requirements*](#).

The project report must be mapped to the descriptors using the [*Project Proposal Referencing Table*](#). The apprentice and employer declaration must be completed prior to submission.

PRESENTATION MATERIALS

The presentation will be delivered to the IEPA and is designed to expand on the project proposal. It should provide evidence to strengthen the coverage of the descriptors from the project proposal report and should include:

- the intended outcomes of the project proposal.
- how the apprentice has undertaken the planning for the project proposal.
- the rationale for the activities.
- outcomes of the board or senior leader sign-off.
- further recommendations for consideration.

Apprentices may use whichever medium they choose for their presentation, but the materials must be submitted electronically.

The project output must be uploaded to Proficient. The apprentice must not alter the project report or presentation materials in any way once submitted. Doing so may result in cancelled or failed assessments.

Document upload:

- project report
- presentation materials
- Project Proposal Referencing Table.



PRESENTATION AND QUESTIONING: LIVE ASSESSMENT

The presentation with questioning will take place at least two weeks after the project report, presentation materials and referencing table have been submitted. This allows the IEPA time to assess the report and prepare questions.

The presentation and questioning will last 60 minutes (plus 10% at the IEPA's discretion to allow the apprentice to complete their last answer). If the assessment exceeds this time limit, anything after 66 minutes will not be assessed.

The presentation will last for a maximum of 26 minutes with the remaining time used for questioning.

The apprentice will have access to audio-visual presentation equipment, flip chart and writing and drawing materials and a computer as required.



QUESTIONS AND ANSWERS (Q&A)

Following the presentation, there will be a break of up to 10 minutes to allow the IEPA to review the questions they have planned.

The IEPA will ask a minimum of eight questions. These questions will be taken from a bank to ensure consistency; however, the IEPA may contextualise them to align with the evidence seen in the apprentice's project proposal and presentation. The IEPA may ask up to two follow-up prompts for each question to clarify their understanding, or probe for evidence for the distinction grading descriptors.

Once all questions have been asked and the apprentice has offered their final response, the apprentice can choose to end the assessment early. At this point, the IEPA will issue the following statement:

“Thank you. I have no further questions to ask. You still have [X] amount of time remaining. Is there anything else you would like to add?”

At this point, the apprentice can choose to ask to bring the assessment to a close.

Sample Questions can be found in the Supporting Documents section.

The apprentice may refer to their project report, presentation and speaker notes during the assessment.

Results will be available on Proficient within five working days.

The background features a dark blue gradient with faint, stylized text and geometric shapes. The word 'MAN' is visible in large, bold letters on the left side. Other faint words like 'Integrity' and 'Support' are scattered across the background. Two horizontal pink lines are positioned above and below the main text.

PROFESSIONAL DISCUSSION UNDERPINNED BY PORTFOLIO OF EVIDENCE

PORTFOLIO OF EVIDENCE

The portfolio should be a showcase demonstrating the apprentice's best work gathered during the on-programme stage of the apprenticeship. It must be mapped to the KSBs and descriptors using the [*Portfolio Template*](#).

The portfolio must contain at least one piece of evidence mapped clearly to each KSB and pass descriptor assigned to this assessment method. The portfolio will typically contain 15 pieces of evidence but must not exceed 25 pieces of evidence. Each piece of evidence may map to more than one descriptor. In addition to the pass descriptors, the apprentice may also choose to map their evidence to the distinction descriptors.

Evidence in the portfolio may include but is not limited to:

- workplace documentation/records, for example workplace policies/procedures/processes, records
- witness statements
- annotated photographs
- video clips (maximum total duration 15 minutes); the apprentice must be in view and identifiable
- people plans and strategies, communications.

This is not a definitive list and other evidence sources are allowable.

The portfolio of evidence should not include reflective accounts or any methods of self-assessment. Any employer contributions should focus on direct observation of performance (for example, witness statements) rather than opinions. The evidence provided must be valid and attributable to the apprentice; the [*Portfolio Template*](#) includes an apprentice, training provider and employer declaration confirming this. Gateway will not be approved if this declaration is not signed.

Please refer to [*DSW Evidence Requirements*](#) for further information.

The portfolio will be reviewed by the IEPA ahead of the professional discussion to help them prepare discussion points. As the portfolio is not assessed, feedback will not be provided on the portfolio evidence before the discussion.





PROFESSIONAL DISCUSSION

The professional discussion takes place between the apprentice and the IEPA and is designed to establish the apprentice's competence against the descriptors that are assigned to this assessment method.

The interview will last for 120 minutes (plus 10% at the IEPA's discretion to allow the apprentice to complete their last answer). If the professional discussion exceeds this time limit, anything after 132 minutes will not be assessed.

The IEPA will use a minimum of 10 prompts to introduce topics for discussion. They may ask follow-up prompts to clarify their understanding, or probe for evidence for the distinction descriptors.

Once all discussion points have been covered and the apprentice has offered their final response, the apprentice can choose to end the assessment early. At this point the IEPA will issue the following statement:

"Thank you. I have no further discussion points. You still have [X] amount of time remaining. Is there anything else you would like to add?"

At this point, the apprentice can choose to ask to bring the assessment to a close.

Sample Questions can be found in the Supporting Documents section.

Results will be available on Proficient within five working days.

GRADING

PROJECT PROPOSAL, PRESENTATION AND QUESTIONING

To achieve a pass, the apprentice must meet all the pass descriptors assigned to this assessment method.

To achieve a distinction, the apprentice must meet all the pass descriptors, and all the distinction descriptors assigned to this assessment method.

PROFESSIONAL DISCUSSION UNDERPINNED BY PORTFOLIO OF EVIDENCE

To achieve a pass, the apprentice must meet all the pass descriptors assigned to this assessment method.

To achieve a distinction, the apprentice must meet all the pass descriptors, and all the distinction descriptors assigned to this assessment method.

OVERALL GRADING

To achieve a pass, the apprentice must pass both assessment methods.

To achieve a distinction, the apprentice must achieve a distinction in both assessment methods.



PROFESSIONAL MEMBERSHIP UPGRADE



Apprentices completing the Level 7 Senior People Professional apprenticeship standard are eligible to apply to the Chartered Institute of Personnel and Development (CIPD) to gain chartered membership status. DSW will fund up to one years' membership for apprentices who successfully pass their end-point assessment with us. The CIPD will assess the apprentice's upgrade application against their membership criteria before awarding the status.

Apprentices are encouraged to complete the *Portfolio Template* and copy and paste the relevant responses into the *CIPD Apprenticeship Upgrade Form*. Further instructions on this are detailed within the *Portfolio Template*.

To apply for the upgrade, the below documents must be submitted to DSW at gateway:

- Apprenticeship Upgrade Form
- CV.

Once the apprentice has successfully achieved a pass or distinction at EPA, DSW will submit the apprentice's *Apprenticeship Upgrade Form* and *CV* to the CIPD for it to be assessed against the chartered membership criteria.

If successful, the CIPD will contact the apprentice directly using the contact details they hold on file to confirm the membership upgrade to the apprentice.

RESITS AND RETAKES

Apprentices who fail will be offered the opportunity to take a resit or a retake. A resit does not require further learning, whereas a retake does.

The apprentice's employer will need to agree that a resit or retake is an appropriate course of action and should assist the apprentice in creating a supportive action plan to help them prepare for the resit or retake.

An apprentice who fails an assessment method will be required to resit or retake the failed assessment method only.

Resits and retakes are not offered to apprentices wishing to move to a higher grade.

A resit is typically taken within two months of the EPA outcome notification. The timescale for a retake is dependent on how much re-training is required, however, all assessment methods must be taken within three months of the EPA outcome notification.

There is no grading cap applied to this standard.



PROJECT PROPOSAL, PRESENTATION AND QUESTIONING

If the apprentice fails the Project Proposal, Presentation and Questioning, they will be given three weeks to amend their project report and presentation in line with feedback from the IEPA. The independent assessor will have two weeks to review the project report and presentation, and the apprentice will have a minimum of five days' notice of the presentation date.

In the case of a resit or a retake the IEPA will ask a different set of questions.

PROFESSIONAL DISCUSSION UNDERPINNED BY PORTFOLIO OF EVIDENCE

In the case of a resit or a retake the IEPA will ask a different set of questions. The apprentice is not permitted to resubmit their portfolio of evidence.

SUPPORTING DOCUMENTS

The documents in this table have been developed specifically for the Level 7 Senior People Professional standard.

DOCUMENT	DESCRIPTION
<u>Amplification V2</u>	Shows which pass and distinction descriptors need to be met through which assessment method, along with additional guidance of the evidence required.
<u>Project Proposal Summary Template V2</u>	The apprentice must submit the <i>Project Proposal Summary Template</i> at gateway. The apprentice may choose to outline how they intend to demonstrate the descriptors through their project proposal.
<u>Portfolio Template V1.1</u>	To be completed by the apprentice to present their portfolio evidence to the KSBs and descriptors. This must be submitted at gateway.
<u>CIPD Apprenticeship Upgrade Form</u>	To be completed by the apprentice alongside their <i>Portfolio Template</i> . This will be submitted to the CIPD following successful completion of EPA.
<u>Consent Form V1</u>	To be completed by the apprentice and submitted to DSW at gateway.
<u>Project Proposal Referencing Table V2</u>	This document must be used to map the project proposal, and additional evidence to each of the descriptors and is submitted at the same time as the project proposal.
<u>Sample Questions V1</u>	Sample questions to support the apprentice's preparation for the presentation and questioning, and the professional discussion.
<u>Updates to Toolkit</u>	This document details changes which have been made to the <i>Toolkit</i> .

Further guidance documents which you may find helpful but are not specific to the Senior People Professional standard are available to download via the links below:

- [Policies and Procedures](#)
- [Conditions for Live Assessments](#)
- [Templates](#)
 - [Witness Testimony](#)
 - [Observation Record](#)
- [Technical requirements for assessment and Zoom/Webex/Teams user guides](#)
- [DSW Evidence Requirements](#)
- [AI Usage Policy](#)
- [GDPR Guidance](#)

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