



Level 5

LEARNING &
DEVELOPMENT
CONSULTANT/
BUSINESS PARTNER

Toolkit





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OVERVIEW

DSW have been appointed to conduct end-point assessment for this apprenticeship. This Toolkit has been created to help the apprentice, training provider and the employer to 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 criteria to be assessed and the environment in which the assessments must take place.

The requirements and content of this Toolkit come directly from the Learning and Development Consultant/Business Partner 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](#).

The learning and development consultant / business partner role exists within a range of organisations including private, public and third sector. Typically, the individual works alongside colleagues who specialise in human resources (i.e., employee relations, reward, recruitment), often supported by a learning and development administrator and/or learning and development practitioner. They report to a senior learning and development manager, head of department or director. In larger organisations, they may be one of a team supporting the business and may have responsibility for managing people and a budget.

The successful apprentice may be eligible to apply for Associate membership of the Chartered Institute of Personnel and Development (CIPD) or any other professional body that recognises this apprenticeship within its membership criteria. (Membership is subject to the professional bodies own membership requirements).



INTRODUCTION

GATEWAY

Apprentices must be on-programme for a minimum 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 criteria.

At gateway, the training provider must submit the following to DSW's Proficient portal for approval:

- Gateway Declaration
- proof of Level 2 English and maths*
- learning journal with self-assessment tracker
- Learning Journal Employer Declaration
- Project Plan (must be signed off before gateway approval).

**DfE exemption rules apply.*

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

EPA OVERVIEW

The EPA consists of two assessment methods:

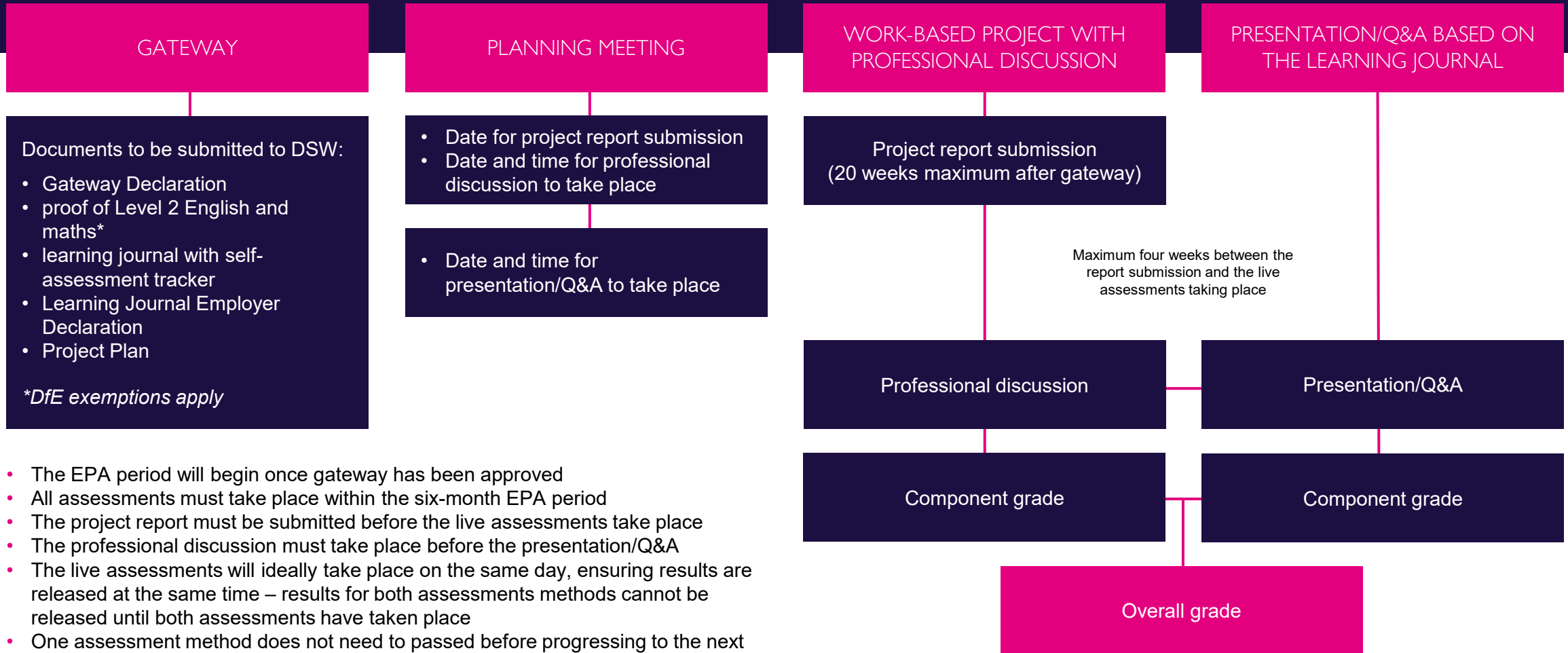
- Work-based Project with Professional Discussion
- Presentation / Q&A based on the Learning Journal.

The standard is made up of 46 grading criteria. There are 32 pass criteria which all apprentices must meet. There are 14 distinction criteria which apprentices aiming for an overall grade of distinction must also meet.



EPA TIMELINE

Maximum six-months duration



- The EPA period will begin once gateway has been approved
- All assessments must take place within the six-month EPA period
- The project report must be submitted before the live assessments take place
- The professional discussion must take place before the presentation/Q&A
- The live assessments will ideally take place on the same day, ensuring results are released at the same time – results for both assessments methods cannot be released until both assessments have taken place
- One assessment method does not need to be passed before progressing to the next



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 on the dates and times for the following assessments:

- Work-based Project with Professional Discussion
 - date for submission of the report and supporting documents
 - assessment date of the project report
 - date of the professional discussion.
- Presentation/Q&A based on the Learning Journal
 - date of the presentation/Q&A.

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 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 assessments may result in delayed, cancelled or failed assessments.

AMPLIFICATION

The amplification documents outline what the apprentice will be assessed against in each assessment method. The Work-based Project with Professional Discussion amplification can be found [here](#). The Presentation / Q&A based on the Learning Journal amplification can be found [here](#).

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 criteria.

The apprentice's competence will be assessed against the pass and distinction criteria during EPA.

Amplifications are written to expand on the pass and distinction criteria. 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.





WORK-BASED
PROJECT WITH
PROFESSIONAL
DISCUSSION



WORK-BASED PROJECT WITH PROFESSIONAL DISCUSSION

The project is a substantive piece of work, requiring you to demonstrate your learning and development (L&D) consultancy skills in relation to a real business problem or requirement. It must be based on real activity done in your role. This activity should demonstrate the grading criteria mapped to the Work-based Project with Professional Discussion. It must not be simulated.

This assessment method is split into two components:

- project report (formal business report)
- professional discussion.

PROJECT PLAN

Before gateway, the apprentices must complete a *Project Plan Template* which details how they plan to meet the grading criteria mapped to this assessment method, through their project. The employer and training provider should support the apprentice in completing their project plan to ensure it meets the requirements of the project.

The IEPA will review the project plan and either approve or reject it within two working days. Gateway will not be approved until the IEPA has approved the scope and returned it to DSW.

At gateway approval, DSW will forward the approved project plan, with the IEPA's feedback via email to the training provider. The apprentice must not start work on the project until the gateway has been approved.

If the plan is rejected, the IEPA will provide feedback to the apprentice. Gateway will not be approved until the project plan has been submitted and approved.



COMPLETING THE WORK-BASED PROJECT

The apprentice will have a maximum of 20 weeks to complete their project and produce a project report in the style of a formal business report. This period begins when the project plan is approved; this is the same date as the gateway approval date as stated on Proficient.

The apprentice will use their L&D consultancy skills to analyse, design, deliver and evaluate their solution. The project must be completed in full, with their designed learning/training solution having been implemented. The apprentice must complete a project report showing what they did, how they did it and the outputs that resulted from the project, critically analysing the reasons for them.

COMPLETING THE PROJECT REPORT

The project report has a maximum word count of 5,500. Reports in excess of this will only be assessed up to this limit. Appendices, references, diagrams etc. are not included in the word count. Please refer to the [Project Guide](#) for further information.

The report should be written in the form a formal business report. The report should describe how the project was delivered. It should focus on the actions and decisions taken, critically analysing the reasons for them, and the outcomes achieved. The project will require significant research both inside the organisation and into the L&D profession. This research should demonstrate breadth of understanding and be applied to support the project's decisions and outcomes. Further guidance can be found in [Project Report Guide](#).

The project report must be mapped to the pass criteria in the [Project Referencing Table](#), mapping to the distinction criteria is optional for apprentices aiming for a distinction.

SUBMITTING THE PROJECT REPORT

The training provider must upload the apprentice's project report to the Assessment Progress section of Proficient on or before the date agreed at the planning meeting.

For further information on how to upload the project report please see the [Assessment Milestone Guidance](#).

The submission must include:

- project report
- supporting documents (product and performance evidence)
- completed [Project Referencing Table](#).

Project reports submitted after the agreed submission deadline will not be accepted and the assessment will be marked as a fail.



PROFESSIONAL DISCUSSION

The professional discussion is a structured dialogue between the apprentice and the IEPA. It is designed to establish the apprentice's competence against the grading criteria assigned to this assessment method.

The apprentice should have access to their project during the professional discussion.

The professional discussion will last for a maximum of 75 minutes (plus 10% at the IEPA's discretion to allow the apprentice to complete their last answer).

If the discussion exceeds this time limit, anything after 83 minutes will not be assessed.

The IEPA will prepare a minimum of 10 and a maximum of 12 discussion points. Wherever possible, these will be used to guide the discussion to ensure that all necessary grading criteria are covered. Each discussion point will be used to open a free-flowing discussion and the IEPA may prompt for further information as appropriate. Apprentices may refer to their project report, or evidence contained with the project report appendices when answering the IEPA's questions.

Results will be available on Proficient within five working days of the final assessment method taking place.

PRESENTATION/Q&A
BASED ON THE
LEARNING JOURNAL



LEARNING JOURNAL

The learning journal is a record of the on-and-off the job learning the apprentice has completed during the on-programme period of their apprenticeship.

The purpose of the learning journal is to develop your ability to reflect and strengthen your critical thinking skills. It also provides an opportunity to improve your future performance by analysing your experience through reflection.

As soon as the apprentice has commenced their apprenticeship programme, they must start developing their learning journal. The apprentice must continue to develop and add to the journal throughout the on-programme period, until they reach EPA. Journal entries should occur at least every four weeks, more frequently if necessary. For further guidance on the learning journal please refer to the [Learning Journal Guide](#).

Below are some examples of key learning / activities which could be used for journal entries:

- attending/facilitating a meeting
- designing learning
- delivering/attending training
- observing colleagues
- providing coaching sessions.

Please note, this not an exhaustive list.

The learning journal will be reviewed by the IEPA ahead of the presentation/Q&A to help them prepare questions. The learning journal is not formally assessed; therefore, feedback will not be provided on the journal evidence before the live assessment.



PRESENTATION MATERIALS

The apprentice must cover examples from their learning journal that most effectively demonstrates each of the following key themes.

Further to this, the apprentice must also cover examples from their learning journal that most effectively demonstrate each of the following key themes:

- new and emerging trends and developments in the L&D sector
- L&D specialisms and their business impact
- leadership.

The apprentice can choose an example for each theme, or one example that encompasses all three.

Further guidance on the three themes can be found in the [Learning Journal Guide](#).

The apprentice may use any medium of their choice for the presentation.

PRESENTATION: LIVE ASSESSMENT

The presentation/Q&A will last for 60 minutes. The presentation must last a maximum of 25 minutes. The IEPA will stop the presentation at the 25-minute point to allow for sufficient time for the Q&A portion of the live assessment.

The IEPA may take a break of up to 10-minutes between the presentation and the Q&A to allow time to finalise the questions they will ask.

For further guidance on developing the presentation materials and preparing for the presentation please see the [Presentation Guide](#).



Q&A: LIVE ASSESSMENT

The Q&A will last 35 minutes (plus 10% at the IEPA's discretion to allow the apprentice to complete their last point/answer).

If the assessment exceeds 39 minutes, anything after this time limit will not be assessed.

The IEPA will ask a minimum of five and a maximum of seven core questions designed to:

- seek clarification on the presentation or learning journal examples provided
- assess the depth and breadth of KSBs
- assess any pass or distinction criteria that have not yet been met.

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 criteria. The apprentice's responses must relate to their learning journal examples. The apprentice may refer to any example from the learning journal during the Q&A.

Results will be available on Proficient within five working days of the final assessment method taking place.



GRADING,
RESITS & RETAKES

GRADING

Work-based Project with Professional Discussion

To achieve a pass, the apprentice must fully meet all 14 pass criteria.

To achieve a distinction, the apprentice must fully meet all 14 pass criteria and all seven distinction criteria.

Presentation / Q&A based on the Learning Journal

To achieve a pass, the apprentice must fully meet all 18 pass criteria.

To achieve a distinction, the apprentice must fully meet all 18 pass criteria and all seven distinction criteria.

Overall Grading

To achieve an overall grade of pass, the apprentice must either achieve:

- a pass in both assessment methods.
- a pass in the Work-based Project with Professional Discussion and a distinction in the Presentation/Q&A based on the Learning Journal.

To achieve an overall grade of merit, the apprentice must achieve a distinction in the Work-based Project with Professional Discussion and a pass in the Presentation / Q&A based on the Learning Journal.

To achieve an overall grade of distinction, the apprentice must achieve a distinction in both assessment methods.





RESITS & 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 training provider, employer and apprentice will determine whether a retake is required. The number of resits/retakes permitted is up to the employer. The timescales and content of the further learning will be defined to support the apprentice ahead of the retake taking place.

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.

In the event of a failed resit/retake the entire EPA will need to be resat or retaken in full after a period of further learning.

A resit/retake allows the apprentice the opportunity to still achieve a distinction, there is not a capped grade.

Presentation/Q&A based on the Learning Journal

If the apprentice fails the presentation/Q&A they are permitted to resit/retake this assessment. The apprentice can choose to rework their original presentation or deliver a new one. This must be re-arranged by DSW and held within one month of the original presentation.

Work-based Project with Professional Discussion

If the apprentice fails the project report with professional discussion, they are permitted to formally re-submit the report and resit the professional discussion.

The resubmission of the project to the EPAO and subsequent professional discussion must happen within two months of receiving notification of the initial fail grade.

Failure due to non-submission of materials:

The component will be graded as a fail and the two-month resit/retake window will begin from the fail notification. Submission and assessment dates will be agreed with the IEPA.



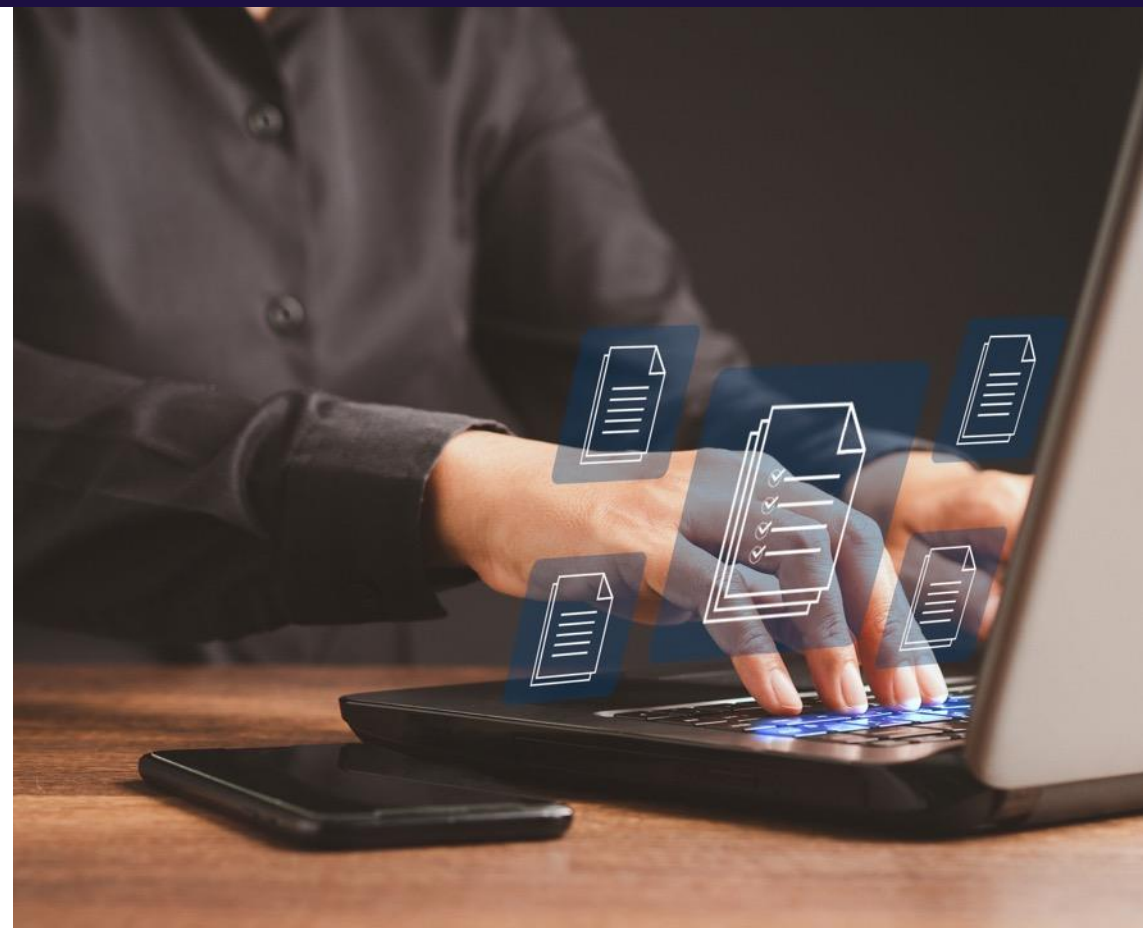
SUPPORTING
DOCUMENTS

SUPPORTING DOCUMENTS

The documents in the following tables have been developed specifically for the Level 5 Learning and Development Consultant/Business Partner standard.

Work-based Project with Professional Discussion

Document	Description
<u>Work-based Project with Professional Discussion Amplification</u>	Shows which pass and distinction criteria need to be met through which assessment method, along with additional guidance of the evidence required.
<u>Project Plan Template</u>	To be completed by the apprentice to show the scope of their work-based project and how they intend to meet the grading criteria. Must be submitted at gateway and signed off by the IEPA prior to work starting on the work-based project.
<u>Project Report Template</u>	The apprentice may choose to use this document to present their project report. This document is not mandatory; the apprentice may choose to submit their report on their own Word or PDF document.
<u>Project Guide</u>	Further information and guidance on the development of the project report.
Project Referencing Table <u>Word version</u> <u>Excel version</u>	The apprentice must submit the <i>Project Referencing Table</i> along with their project report and supporting evidence. The apprentice should map their evidence to the specific criteria to which it relates. They can use whichever version they prefer.
<u>Sample Questions</u>	Sample discussion prompts.

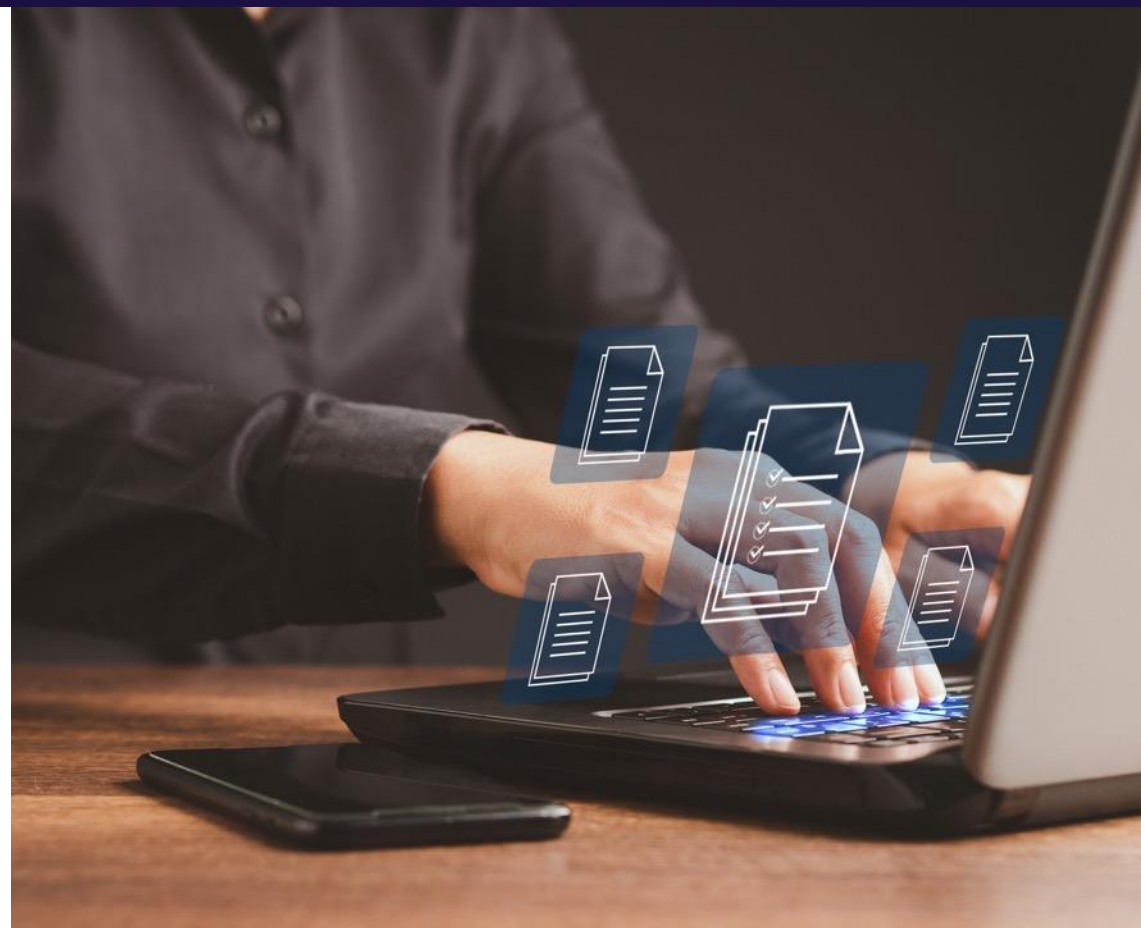


SUPPORTING DOCUMENTS

The documents in the following tables have been developed specifically for the Level 5 Learning and Development Consultant/Business Partner standard.

Presentation/Q&A based on the Learning Journal

Document	Description
<u>Presentation/Q&A based on the Learning Journal Amplification</u>	Shows which pass and distinction criteria need to be met through which assessment method, along with additional guidance of the evidence required.
<u>Learning Journal Employer Declaration</u>	To be completed and signed by the employer with the apprentice and submitted at gateway.
<u>Learning Journal Guide</u>	Further information and guidance on the development of the learning journal.
<u>Learning Journal Template</u>	The apprentice may wish to use this template to develop their learning journal, alternatively the apprentice can create their own following the guidance above.
<u>Self-assessment Tracker</u>	The apprentice may wish to use this template to track their progress against the KSBs during their on-programme period, alternatively the apprentice can create their own.
<u>Presentation Guide</u>	Further information and guidance on the development and delivery of the presentation.
<u>Sample Questions</u>	Sample assessment questions.



ADDITIONAL DOCUMENTS

Toolkit Amendments

Details of all amendments made to the Toolkit and supporting documents can be found [here](#).

Further guidance documents, which you may find helpful but are not specific to the Learning and Development Consultant/Business Partner standard, are available to download via the links below:

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





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