



# Senior Leader Apprenticeship - End Point Assessment (EPA) Overview



Prepared by QA Limited

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## 1. EPA headlines

- Aligns with professional recognition - Chartered Management Institute – Chartered Manager or Chartered Fellow
- EPA period typically lasting 5 months
- Must provide gateway requirements according to EPAO listed below
- Must have ID and Webcam for EPA
- 2 Assessment methods at EPA

### Strategic business proposal, presentation with questioning

- Scoping document to be agreed by the employer and EPAO at gateway
- Duration is typically 12 weeks
- The proposal has a 4,000 word limit (+/- 10%)
- The presentation will focus and expand upon the strategic business proposal
- Presentation and questioning will last 60 minutes (+10%), with the presentation lasting 20 minutes and the questioning lasting 40 minutes

### Professional discussion underpinned by a portfolio of evidence

- Will last 60 minutes (+10%)
- Minimum of 8 questions will be asked
- Apprentice can have access to their portfolio of evidence

## 2. Gateway

Gateway is the point that the employer is satisfied that the apprentice is consistently working at or above the level set out in the occupational standard. In making this decision, the employer may take advice from the training provider, but the decision must ultimately be made by the employer.

Apprentices must meet the following gateway requirements for Senior Leader Apprenticeship programme:



- Confirmation that the academic modules have been completed
- Completion of a Portfolio of Evidence
- Submitted a strategic business proposal scoping document
- EPA gateway readiness checklist
- Level 2 English and Maths evidence
- Completion of the Off the Job hours

The EPAO determines when all gateway requirements have been met, and the EPA period will only commence once the EPAO has confirmed this.

### **3. End Point Assessment**

For the End Point Assessment, the learner must complete the following assessments

- Assessment method 1: Strategic business proposal, presentation with questioning
- Assessment method 2: Professional discussion underpinned by a portfolio of evidence

#### **Assessment Method 1: Strategic business proposal, presentation with questioning**

The strategic business proposal assessment is graded Pass, Distinction or Fail. This assessment has two components.

##### **Component 1: Strategic business proposal**

This must be undertaken after gateway with a time frame of 12 weeks. The employer must ensure the apprentice has sufficient time and the necessary resources to enable the apprentice to plan and undertake the work associated with the strategic business proposal.

The word count for this assessment is 4,000 words (+/- 10%) and will need to include:

- An executive summary
- The scope of the strategic business proposal (including key performance indicators)
- Objectives
- The strategic business proposal (which may include Gantt charts, risk/issue/mitigation, responsibility assignment matrix (RACI matrix))
- Financial budgeting and resources



- Proposed implementation of the strategic business proposal including communications and stakeholder plans
- Analysis of options identified in the strategic business proposal
- Recommendations and conclusions
- Evidence of senior leader or board agreement to the implementation of the strategic business proposal

## **Component 2: Presentation with questioning**

The apprentice will deliver a 20 minute presentation to the independent assessor, expanding upon the strategic business proposal, and will allow the apprentice to cover:

- What are the intended outcomes and impact of the strategic business proposal?
- How have they undertaken the strategic planning?
- What was the rationale for the activities?
- Further recommendations for future growth and progress
- How they have negotiated with and influenced stakeholders.

Following their presentation the apprentice will complete a 40 minute questioning session, which includes a minimum of 6 questions. A discretionary additional 10% time can be allocated across this assessment.

## **Assessment Method 2: Professional discussion underpinned by a portfolio of evidence**

The professional discussion assessment is graded Pass, Distinction or Fail. This discussion will last for 60 minutes with a discretionary additional 10% time.

The completed portfolio will be reviewed by an independent assessor and the apprentice is encouraged to refer to their portfolio during this discussion. A minimum of 8 questions will be asked.

A range of material can be used within the portfolio, such as reports, minutes, written statements, presentations and feedback from employer and peers. This evidence can be gathered from the first day of learning. A typical portfolio will contain 18 discrete pieces of evidence.

## **4. Grading**

Both assessment methods must be passed in order to pass overall.



Strategic business proposal	Professional Discussion	Overall Grade
Pass	Pass	Pass
Pass	Distinction	Pass
Distinction	Pass	Pass
Distinction	Distinction	Distinction

## 5. Resit and Retakes

Both assessment methods must be successfully passed. If an apprentice fails one or more assessment method(s) then they can re-sit within three months of receiving the EPA outcome. If a re-take is required, then further learning is needed and will typically be taken within six months of receiving the EPA outcome. If the re-sit/re-take is not completed within this timeframe, then the entire EPA will need to be re-taken in full. Where any assessment method has to be re-sat or re-taken, the apprentice will be awarded a maximum EPA grade of pass.

If the apprentice fails the strategic business proposal assessment method, they will be required to amend the strategic business proposal and presentation in line with the independent assessor's feedback. The apprentice will be given 3 weeks to rework and submit the amended strategic business proposal and presentation. The independent assessor will have 2 weeks to review the strategic business proposal and presentation and the apprentice will have 4 weeks' notice of the presentation date.

Further information on the Senior Leader Apprenticeship EPA can be found in the [assessment plan](#). A full list of the Knowledge, Skills and Behaviours (KSBs) can be found on the Institute for Apprenticeships website [here](#).

