



Davidson Training UK Ltd
Training for Growing Businesses

TEAM
LEADER/SUPERVISOR
APPRENTICESHIP
STANDARD LEVEL 3
V6.0

HANDBOOK Version 1 November 2024

HANDBOOK

This Handbook has been produced for learners and employers for the Team Leader/Supervisor Apprenticeship Standard Level 3

Davidson Training UK Limited

Team Leader/Supervisor Apprenticeship Standard Level 3

Qualification aim

This occupation is found in small, medium, large, and multinational organisations in private, public, and third sectors across all areas of the economy.

A team leader is found in organisations where there is a need for first-line management and support for teams and senior management.

The broad purpose of this role is to provide leadership with operational and project responsibilities. Team leaders manage individuals, teams, or elements of a project, offering direction, instructions, and guidance to achieve set goals. They are vital for the smooth functioning of all departments within an organisation and are often responsible for ensuring that functions are correctly administered and maintained in line with legislation and the organisation's procedures.

In their daily work, an employee in this occupation interacts with colleagues from various internal departments, including operations, human resources, finance, legal, IT, sales, and marketing. This role also involves interaction with external stakeholders such as customers, clients, and suppliers. It may include off-site and hybrid working.

An employee in this occupation is responsible for supporting, managing, and developing individuals; managing projects; planning and monitoring workloads and resources; delivering operational plans; resolving problems; and building relationships both internally and externally.

Team leaders may work as part of a network or in various team settings. They operate within agreed budgets and available resources, reporting to mid-level and senior managers. While they may occasionally make decisions, they more often guide or influence the decisions of others, including collecting and interpreting data to identify trends, analysing resources, and finding ways to save money and improve efficiency.

Team leaders understand how their role supports the broader organisational structure. They apply codes of practice, legislation, and regulations relevant to their organisation's areas of operation. This includes not only legal and ethical responsibilities but also equity, inclusion, and the sustainability impacts of the organisation.

On completion, apprentices may choose to register as associate members with the Chartered Management Institute for Associate Membership or the Institute of Leadership for Associate Membership.

The approach has been designed to be:

- Appropriate, relevant and feasible in a wide range of contexts
- Consistent across these contexts
- Affordable and manageable based on the number of potential learners.

Benefits

- You will develop a range of essential management skills applied and refined in a real working environment.
- You will build the leadership capability to motivate teams and influence with confidence.
- You will gain a broad understanding of key management and leadership theory to underpin and support growth and performance.
- Targeted learning and development are delivered in alignment with the latest apprenticeship standards – ensuring all learning is relevant, with no gaps in knowledge.
- It will maximise confidence and readiness for End Point Assessment.

Results for learners

- Learners gain a range of key management skills.
- Put new skills into practice in own role
- Build leadership capabilities
- Motivate and engage teams, manage relationships confidently
- Develop leadership skills using own knowledge, values and motivation

Impact for employers

- Effective and confident first-line managers
- Better relationships and communication in teams
- Measurable results: workplace-based assessment ensures new skills are effectively transferred to employer's business

Entry requirements

There are no entry requirements for this qualification however you must be in a position to meet the assessment demands of the qualification, which are work- based and reflective in nature. As this qualification is work-based, learners must be employed in an appropriate role.

Age restrictions

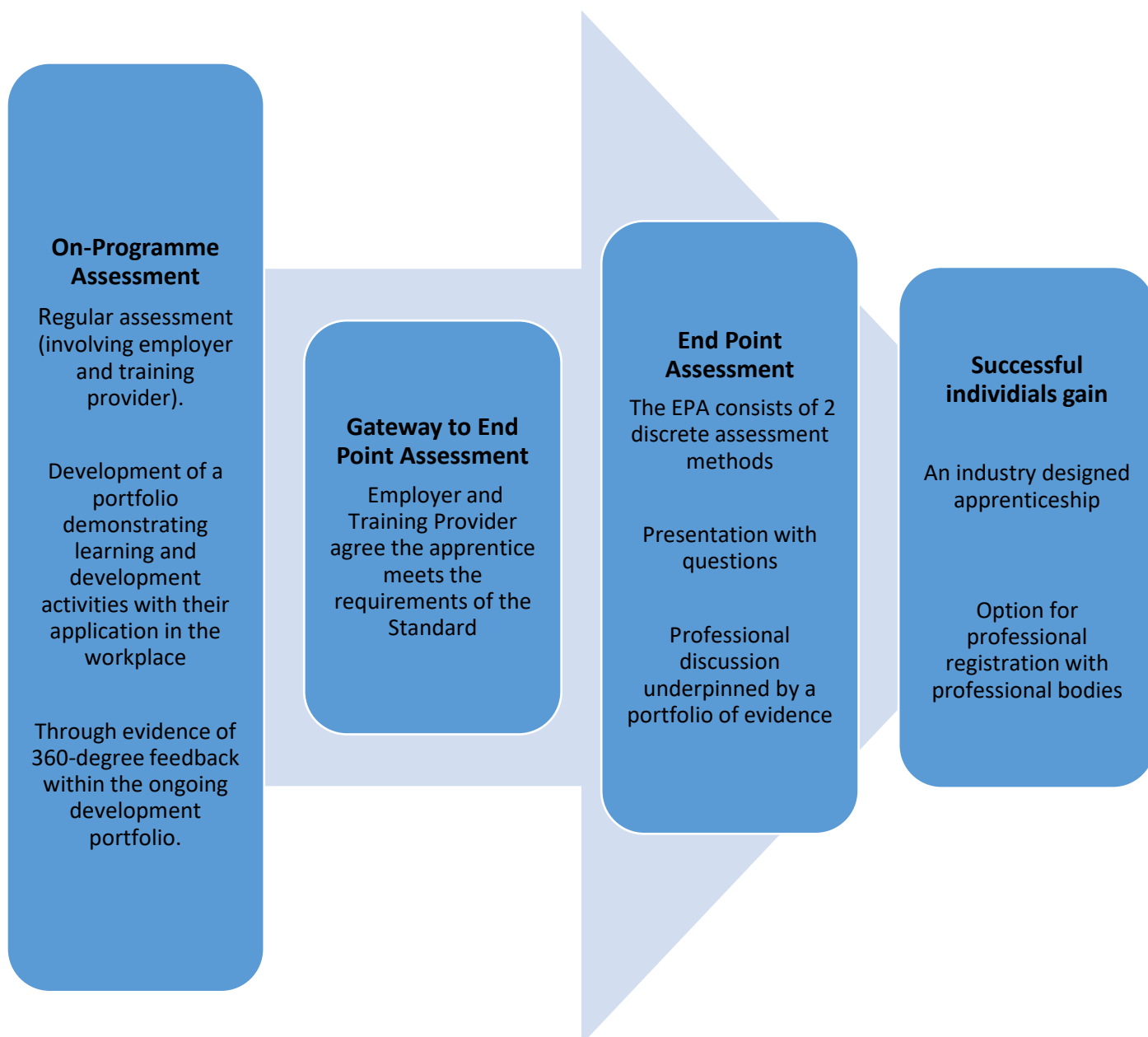
We registrations for learners under 16 as this qualification is not approved for under 16s.

Duration

The apprenticeship will take a minimum of 13-15 months to complete

There are no mandatory qualifications for apprentices for this standard

The Assessment Model



On-programme Assessment

This is typically a 12- 15-month apprenticeship with an integrated approach to the assessment of knowledge, skills and behaviours.

The On-Programme Assessment approach will be agreed between the training provider and employer. The assessment will give an ongoing indication of performance against the final outcomes defined in the standard. The programme will cover the breadth and depth of the standard using suggested on-programme assessment methods that integrate the knowledge, skills and behaviour components, and which ensure that the apprentice is sufficiently prepared to undertake the work-based project and move to End Point Assessment.

On-programme assessment includes:

- Regular performance reviews undertaken by the employer.
- Development of a portfolio of evidence including reports, assignments, evidence of tasks undertaken, demonstrations, presentations.
- Observation recorded by the Employer and a Witness Testimony supplied
- Ongoing professional discussions between apprentice and Davidson Training relating to projects and assignments (recorded by Davidson Training)
- Feedback from line manager, direct reports and peers including 360-degree feedback approaches

Evidence sources may include:

- workplace documentation and records, for example:
- workplace policies and procedures
- witness statements
- annotated photographs
- video clips with a maximum total duration 5 minutes; the apprentice must be in view and identifiable

This is not a definitive list; other evidence sources can be included.

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 should be valid and attributable to the apprentice; the portfolio of evidence should contain a statement from the employer and apprentice confirming this.

The portfolio of evidence will demonstrate the skills and behaviours learned and applied. Assessment will monitor ongoing performance of the apprentice, and Davidson Training and the employer must support the apprentice and provide guidance as required.

The programme and assessments will be clearly mapped to Standard by Davidson Training to show how the outcomes will be met.

Apprentices without level 2 English and Maths will need to be assessed at this level prior to taking the end-point assessment. It is also recommended that the apprentice is supported to become digitally literate where this is important to their role.

Assessment Gateway

The line manager (employer) will make the decision as to when the apprentice is ready, based on the apprentice consistently working at, or above, the level of the occupational standard and being competent and performing in their role. This decision will be supported by input from Davidson Training.

End-point assessment – What is this?

End-point assessment is a new way of assuring quality in the apprenticeship system. It replaces the existing model of continuous assessment resulting in qualifications.

The decision on readiness to progress to the End Point Assessment will be taken by the line manager and apprentice with input from the Training Provider.

The End Point Assessment (EPA) consists of three elements, all of which may be completed online. All assessment methods need to be passed. Each assessment method should directly assess the knowledge, skills and behaviours of the Standard. The assessor has the final decision.

**Team Leader/Supervisor Apprenticeship Standard Level 3
Occupation Duties**

Duty 1

Sets, monitors, and manages objectives and performance which link to organisational outcomes.

Knowledge

K1: Performance management techniques.
 K2: How to identify the learning needs of others and solutions to address them.
 K5: Relevant regulation, legislation, and compliance that impacts their role and the organisation.
 K6: Organisational strategy and objectives and how their role impacts on them.
 K7: How to manage resources to implement operational and team plans.
 K9: Communication techniques including presentation skills, negotiation and influencing skills.
 K10: Policy and procedure relating to people and organisational culture.
 K17: Leadership and management approaches.
 K18: The purpose of their role within the organisation, including their level of responsibility and accountability.
 K19: The impact that cross-team working has in the delivery of organisational objectives.
 K23: Principles of equity, diversity and inclusion in the workplace and their impact on the organisation and the team.

Skills

S1: Use resources to implement operational and team plans.
 S2: Use tools to organise, prioritise and allocate daily and weekly work activities.
 S4: Identify and support the development of the team through informal coaching and continuous professional development.
 S9: Manage individual or team performance by setting objectives, monitoring progress, and providing clear guidance and feedback.
 S11: Interpret organisational strategy and communicate how this impacts others.
 S13: Communicate information through different media, such as face-to-face meetings, emails, reports, and presentations to enable key stakeholders to understand what is required.
 S17: Interpret policy and support the delivery of equity, diversity and inclusion in the workplace and monitor their impact on their team.

Behaviours

B1: Acts professionally, ethically and with integrity. stakeholders fairly and with respect.
 B2: Supports an inclusive culture, treating colleagues and external
 B4: Seeks learning opportunities and continuous professional development.
 B5: Works flexibly and adapts to circumstances.

Duty 2

Manage resources to deliver tasks within budget and targets.

Knowledge

K1: Performance management techniques.
 K2: How to identify the learning needs of others and solutions to address them.
 K7: How to manage resources to implement operational and team plans.
 K8: Time management and prioritisation tools.
 K14: IT and software used to support the activities of the business.
 K19: The impact that cross-team working has in the delivery of organisational objectives.
 K22: Approaches to managing budgets, and options and choices to maximise efficient use of resources.

Skills

S1: Use resources to implement operational and team plans.
 S2: Use tools to organise, prioritise and allocate daily and weekly work activities.
 S5: Use information and problem-solving techniques to provide solutions and influence the decision-making process.
 S14: Collaborate with stakeholders in the organisation to ensure the delivery of operational goals.
 S19: Monitor the use of technology and the potential to reduce energy consumption through their optimisation in

day-to-day tasks, such as reducing the use of paper and switching off items when not in use.

Behaviours

B3: Takes accountability and ownership of their tasks and workload.

B5: Works flexibly and adapts to circumstances.

Duty 3

Contributes to the training and ongoing development needs of the individual or the team.

Knowledge

K1: Performance management techniques.

K2: How to identify the learning needs of others and solutions to address them.

K3: Processes and policies which support the delivery of operational requirements.

K5: Relevant regulation, legislation, and compliance that impacts their role and the organisation.

K6: Organisational strategy and objectives and how their role impacts on them.

K10: Policy and procedure relating to people and organisational culture.

K16: The impact that internal and external factors such as environmental impacts, have on their role.

K17: Leadership and management approaches.

K18: The purpose of their role within the organisation, including their level of responsibility and accountability.

K19: The impact that cross-team working has in the delivery of organisational objectives.

K23: Principles of equity, diversity and inclusion in the workplace and their impact on the organisation and the team.

Skills

S3: Able to collate and interpret data and information and create reports.

S4: Identify and support the development of the team through informal coaching and continuous professional development.

S7: Review work processes to identify opportunities to improve performance and for continuous improvement.

S9: Manage individual or team performance by setting objectives, monitoring progress, and providing clear guidance and feedback.

S18: Identify future changes in the sector such as technology advances that may impact their organisation.

Behaviours

B2: Supports an inclusive culture, treating colleagues and external stakeholders fairly and with respect.

B4: Seeks learning opportunities and continuous professional development.

Duty 4

Collates and interprets data and shares outputs with stakeholders to support decision-making.

Knowledge

K9: Communication techniques including presentation skills, negotiation and influencing skills.

K12: Problem-solving and decision-making principles.

K14: IT and software used to support the activities of the business.

K15: External factors that affect the workplace, such as sustainability and net carbon zero, and how they are managed.

K20: How to collate, interpret and communicate data and information to meet the needs of different audiences.

K21: The wider social and economic environment in which the organisation operates.

Skills

S2: Use tools to organise, prioritise and allocate daily and weekly work activities.

S3: Able to collate and interpret data and information and create reports.

S5: Use information and problem-solving techniques to provide solutions and influence the decision-making process.

S7: Review work processes to identify opportunities to improve performance and for continuous improvement.

S8: Use technology and software to produce documentation, such as spreadsheets and presentation packages to communicate information.

S11: Interpret organisational strategy and communicate how this impacts others.

S12: Interpret and apply regulation and legislation, share best practices, and advise stakeholders on their application.

S13: Communicate information through different media, such as face-to-face meetings, emails, reports, and

presentations to enable key stakeholders to understand what is required.

S14: Collaborate with stakeholders in the organisation to ensure the delivery of operational goals.

S15: Manage and maintain relationships with a diverse workforce and stakeholders.

S16: Negotiate with and challenge stakeholders to manage change and reduce conflict.

Behaviours

B1: Acts professionally, ethically and with integrity.

B2: Supports an inclusive culture, treating colleagues and external stakeholders fairly and with respect.

B5: Works flexibly and adapts to circumstances.

Duty 5

Contributes to projects, initiatives, and their implementation to achieve organisational goals.

Knowledge

K1: Performance management techniques.

K4: Project management tools and techniques.

K6: Organisational strategy and objectives and how their role impacts on them.

K7: How to manage resources to implement operational and team plans.

K8: Time management and prioritisation tools.

K9: Communication techniques including presentation skills, negotiation and influencing skills.

K11: Stakeholder management.

K12: Problem-solving and decision-making principles.

K13: Principles of change management and continuous improvement.

K16: The impact that internal and external factors such as environmental impacts, have on their role.

K17: Leadership and management approaches.

K18: The purpose of their role within the organisation, including their level of responsibility and accountability.

K19: The impact that cross-team working has in the delivery of organisational objectives.

K20: How to collate, interpret and communicate data and information to meet the needs of different audiences.

K22: Approaches to managing budgets, and options and choices to maximise efficient use of resources.

Skills

S1: Use resources to implement operational and team plans.

S2: Use tools to organise, prioritise and allocate daily and weekly work activities.

S3: Able to collate and interpret data and information and create reports.

S5: Use information and problem-solving techniques to provide solutions and influence the decision-making process.

S6: Use digital tools for planning and project management to monitor project progress, taking corrective action to deliver against the project plan.

S7: Review work processes to identify opportunities to improve performance and for continuous improvement.

S8: Use technology and software to produce documentation, such as spreadsheets and presentation packages to communicate information.

S10: Manage others through change by identifying challenges and the activities to resolve them.

S11: Interpret organisational strategy and communicate how this impacts others.

S13: Communicate information through different media, such as face-to-face meetings, emails, reports, and presentations to enable key stakeholders to understand what is required.

S14: Collaborate with stakeholders in the organisation to ensure the delivery of operational goals.

S15: Manage and maintain relationships with a diverse workforce and stakeholders.

S16: Negotiate with and challenge stakeholders to manage change and reduce conflict.

S18: Identify future changes in the sector such as technology advances that may impact their organisation.

Behaviours

B1: Acts professionally, ethically and with integrity.

B2: Supports an inclusive culture, treating colleagues and external stakeholders fairly and with respect.

B3: Takes accountability and ownership of their tasks and workload.

B5: Works flexibly and adapts to circumstances.

Duty 6

Monitors and applies operational policies, relevant legislation, and regulation, and makes recommendations to ensure individual and team compliance.

Knowledge

K1: Performance management techniques.

K3: Processes and policies which support the delivery of operational requirements.

K5: Relevant regulation, legislation, and compliance that impacts their role and the organisation.

K9: Communication techniques including presentation skills, negotiation and influencing skills.

K10: Policy and procedure relating to people and organisational culture.

K20: How to collate, interpret and communicate data and information to meet the needs of different audiences.

Skills

S3: Able to collate and interpret data and information and create reports.

S12: Interpret and apply regulation and legislation, share best practices, and advise stakeholders on their application.

S17: Interpret policy and support the delivery of equity, diversity and inclusion in the workplace and monitor their impact on their team.

Duty 7

Identifies, assesses, and monitors potential risks, and supports the mitigation of risk within the organisation.

Knowledge

K4: Project management tools and techniques.

K5: Relevant regulation, legislation, and compliance that impacts their role and the organisation.

K7: How to manage resources to implement operational and team plans.

K9: Communication techniques including presentation skills, negotiation and influencing skills.

K10: Policy and procedure relating to people and organisational culture.

K13: Principles of change management and continuous improvement.

K15: External factors that affect the workplace, such as sustainability and net carbon zero, and how they are managed.

K16: The impact that internal and external factors such as environmental impacts, have on their role.

K21: The wider social and economic environment in which the organisation operates.

K22: Approaches to managing budgets, and options and choices to maximise efficient use of resources.

K23: Principles of equity, diversity and inclusion in the workplace and their impact on the organisation and the team.

Skills

S5: Use information and problem-solving techniques to provide solutions and influence the decision-making process.

S6: Use digital tools for planning and project management to monitor project progress, taking corrective action to deliver against the project plan.

S7: Review work processes to identify opportunities to improve performance and for continuous improvement.

S8: Use technology and software to produce documentation, such as spreadsheets and presentation packages to communicate information.

S10: Manage others through change by identifying challenges and the activities to resolve them.

S12: Interpret and apply regulation and legislation, share best practices, and advise stakeholders on their application.

S17: Interpret policy and support the delivery of equity, diversity and inclusion in the workplace and monitor their impact on their team.

S18: Identify future changes in the sector such as technology advances that may impact their organisation.

Duty 8

Contributes to change and support others through change.

Knowledge

- K1: Performance management techniques.
- K2: How to identify the learning needs of others and solutions to address them.
- K4: Project management tools and techniques.
- K9: Communication techniques including presentation skills, negotiation and influencing skills.
- K10: Policy and procedure relating to people and organisational culture.
- K11: Stakeholder management.
- K12: Problem-solving and decision-making principles.
- K13: Principles of change management and continuous improvement.
- K15: External factors that affect the workplace, such as sustainability and net carbon zero, and how they are managed.
- K16: The impact that internal and external factors such as environmental impacts, have on their role.
- K17: Leadership and management approaches.
- K19: The impact that cross-team working has in the delivery of organisational objectives.
- K20: How to collate, interpret and communicate data and information to meet the needs of different audiences.
- K21: The wider social and economic environment in which the organisation operates.
- K23: Principles of equity, diversity and inclusion in the workplace and their impact on the organisation and the team.

Skills

- S4: Identify and support the development of the team through informal coaching and continuous professional development.
- S5: Use information and problem-solving techniques to provide solutions and influence the decision-making process.
- S6: Use digital tools for planning and project management to monitor project progress, taking corrective action to deliver against the project plan.
- S7: Review work processes to identify opportunities to improve performance and for continuous improvement.
- S10: Manage others through change by identifying challenges and the activities to resolve them.
- S11: Interpret organisational strategy and communicate how this impacts others.
- S13: Communicate information through different media, such as face-to-face meetings, emails, reports, and presentations to enable key stakeholders to understand what is required.
- S14: Collaborate with stakeholders in the organisation to ensure the delivery of operational goals.
- S15: Manage and maintain relationships with a diverse workforce and stakeholders.
- S16: Negotiate with and challenge stakeholders to manage change and reduce conflict.
- S17: Interpret policy and support the delivery of equity, diversity and inclusion in the workplace and monitor their impact on their team.
- S18: Identify future changes in the sector such as technology advances that may impact their organisation.

Behaviours

- B1: Acts professionally, ethically and with integrity.
- B2: Supports an inclusive culture, treating colleagues and external stakeholders fairly and with respect.
- B5: Works flexibly and adapts to circumstances.

Duty 9

Support the development and implementation of sustainable operational plans to achieve organisation goals.

Knowledge

- K1: Performance management techniques.
- K3: Processes and policies which support the delivery of operational requirements.
- K6: Organisational strategy and objectives and how their role impacts on them.
- K7: How to manage resources to implement operational and team plans.
- K11: Stakeholder management.
- K13: Principles of change management and continuous improvement.
- K15: External factors that affect the workplace, such as sustainability and net carbon zero, and how they are managed.

K21: The wider social and economic environment in which the organisation operates.
Skills
S1: Use resources to implement operational and team plans. S11: Interpret organisational strategy and communicate how this impacts others. S13: Communicate information through different media, such as face-to-face meetings, emails, reports, and presentations to enable key stakeholders to understand what is required. S14: Collaborate with stakeholders in the organisation to ensure the delivery of operational goals. S16: Negotiate with and challenge stakeholders to manage change and reduce conflict. S18: Identify future changes in the sector such as technology advances that may impact their organisation.
Behaviours
B2: Supports an inclusive culture, treating colleagues and external stakeholders fairly and with respect.

Duty 10

Lead and manage the team to ensure the application of equity, diversity, and inclusion principles

Knowledge
K1: Performance management techniques. K5: Relevant regulation, legislation, and compliance that impacts their role and the organisation. K10: Policy and procedure relating to people and organisational culture. K17: Leadership and management approaches.
Skills
S4: Identify and support the development of the team through informal coaching and continuous professional development. S9: Manage individual or team performance by setting objectives, monitoring progress, and providing clear guidance and feedback. S12: Interpret and apply regulation and legislation, share best practices, and advise stakeholders on their application. S17: Interpret policy and support the delivery of equity, diversity and inclusion in the workplace and monitor their impact on their team.
Behaviours
B1: Acts professionally, ethically and with integrity. B2: Supports an inclusive culture, treating colleagues and external stakeholders fairly and with respect. B3: Takes accountability and ownership of their tasks and workload.

Duty 11

Collaborates and builds relationships with stakeholders to identify and support improvement opportunities.

Knowledge
K4: Project management tools and techniques. K9: Communication techniques including presentation skills, negotiation and influencing skills. K11: Stakeholder management. K12: Problem-solving and decision-making principles. K13: Principles of change management and continuous improvement. K15: External factors that affect the workplace, such as sustainability and net carbon zero, and how they are managed. K16: The impact that internal and external factors such as environmental impacts, have on their role. K19: The impact that cross-team working has in the delivery of organisational objectives. K23: Principles of equity, diversity and inclusion in the workplace and their impact on the organisation and the team.
Skills
S5: Use information and problem-solving techniques to provide solutions and influence the decision-making process. S6: Use digital tools for planning and project management to monitor project progress, taking corrective action to deliver against the project plan. S7: Review work processes to identify opportunities to improve performance and for continuous improvement.

S8: Use technology and software to produce documentation, such as spreadsheets and presentation packages to communicate information.

S10: Manage others through change by identifying challenges and the activities to resolve them.

S12: Interpret and apply regulation and legislation, share best practices, and advise stakeholders on their application.

S13: Communicate information through different media, such as face-to-face meetings, emails, reports, and presentations to enable key stakeholders to understand what is required.

S14: Collaborate with stakeholders in the organisation to ensure the delivery of operational goals.

S15: Manage and maintain relationships with a diverse workforce and stakeholders.

S16: Negotiate with and challenge stakeholders to manage change and reduce conflict.

S18: Identify future changes in the sector such as technology advances that may impact their organisation.

Behaviours

B1: Acts professionally, ethically and with integrity.

B2: Supports an inclusive culture, treating colleagues and external stakeholders fairly and with respect.

Duty 12

Communicates information to drive operational activities and improve organisational performance.

Knowledge

K9: Communication techniques including presentation skills, negotiation and influencing skills.

K11: Stakeholder management.

K12: Problem-solving and decision-making principles.

K13: Principles of change management and continuous improvement.

K14: IT and software used to support the activities of the business.

K20: How to collate, interpret and communicate data and information to meet the needs of different audiences.

Skills

S3: Able to collate and interpret data and information and create reports.

S5: Use information and problem-solving techniques to provide solutions and influence the decision-making process.

S8: Use technology and software to produce documentation, such as spreadsheets and presentation packages to communicate information.

S11: Interpret organisational strategy and communicate how this impacts others.

S12: Interpret and apply regulation and legislation, share best practices, and advise stakeholders on their application.

S13: Communicate information through different media, such as face-to-face meetings, emails, reports, and presentations to enable key stakeholders to understand what is required.

S16: Negotiate with and challenge stakeholders to manage change and reduce conflict.

Behaviours

B1: Acts professionally, ethically and with integrity.

B2: Supports an inclusive culture, treating colleagues and external stakeholders fairly and with respect.

B3: Takes accountability and ownership of their tasks and workload.

B5: Works flexibly and adapts to circumstances.

Duty 13

Manage the team and resources to reduce carbon footprint and reduce business costs.

Knowledge

K1: Performance management techniques.

K2: How to identify the learning needs of others and solutions to address them.

K3: Processes and policies which support the delivery of operational requirements.

K5: Relevant regulation, legislation, and compliance that impacts their role and the organisation.

K6: Organisational strategy and objectives and how their role impacts on them.

K7: How to manage resources to implement operational and team plans.

K12: Problem-solving and decision-making principles.

K13: Principles of change management and continuous improvement.

K15: External factors that affect the workplace, such as sustainability and net carbon zero, and how they are

managed.

K16: The impact that internal and external factors such as environmental impacts, have on their role.

K17: Leadership and management approaches.

K21: The wider social and economic environment in which the organisation operates.

K22: Approaches to managing budgets, and options and choices to maximise efficient use of resources.

Skills

S1: Use resources to implement operational and team plans.

S5: Use information and problem-solving techniques to provide solutions and influence the decision-making process.

S7: Review work processes to identify opportunities to improve performance and for continuous improvement.

S10: Manage others through change by identifying challenges and the activities to resolve them.

S11: Interpret organisational strategy and communicate how this impacts others.

S12: Interpret and apply regulation and legislation, share best practices, and advise stakeholders on their application.

S18: Identify future changes in the sector such as technology advances that may impact their organisation.

S19: Monitor the use of technology and the potential to reduce energy consumption through their optimisation in day-to-day tasks, such as reducing the use of paper and switching off items when not in use.

Behaviours

B1: Acts professionally, ethically and with integrity.

B2: Supports an inclusive culture, treating colleagues and external stakeholders fairly and with respect.

Team Leader/Supervisor Apprenticeship Standard End Point Assessment consists of:

The end-point assessment for Team Leader/Supervisor is made up of 2 components.

1. 20-minute presentation with 30 minutes of questions and answers
2. 1- hour professional discussion underpinned by a portfolio of evidence.

Presentation with questions

- To achieve a pass, apprentices will need to achieve all of the pass criteria.
- To achieve a Distinction, apprentices will need to achieve all of the pass criteria and all of the distinction criteria.

Professional discussion underpinned by a portfolio of evidence

- To achieve a pass, apprentices will need to achieve all of the pass criteria.
- To achieve a Distinction, apprentices will need to achieve all of the pass criteria and all of the distinction criteria.

This apprenticeship aligns with:

- The Chartered Management Institute for Associate Membership

This apprenticeship aligns with:

- Institute of Leadership for Associate Membership

Presentation with questions

Overview

In the presentation with questions, the apprentice delivers a presentation to an independent assessor on a set subject. The independent assessor must ask questions after the presentation. It gives the apprentice the opportunity to demonstrate the KSBs mapped to this assessment method.

Rationale

This assessment method is being used because:

- it assesses understanding of a subject
- setting the presentation title post-gateway ensures the reliability and validity of the EPA, and allows the independent assessor to prepare appropriate questions pertinent to the presentation
- it allows the apprentice to directly demonstrate KSBs relating to communication and presentation
- it provides the opportunity to use authentic workplace contexts which increases assessment validity in relation to the occupational role
- it allows for the presentation of evidence and testing of responses where there are a range of potential answers
- it can be conducted remotely, potentially reducing cost.

Delivery

The presentation with questions must be structured to give the apprentice the opportunity to demonstrate the KSBs mapped to this assessment method to the highest available grade.

An independent assessor must conduct and assess the presentation with questions.

The presentation must cover a summary of their role as a team leader, and what they do and how this is relevant to their role and the organisation. It should focus on how they tackle current topics and will cover all KSBs assigned to this method.

Following a discussion with the employer, the apprentice will be given their presentation topic post gateway by the EPAO. The presentation will be based on one of the following topics:

- Reviewing ways to reduce cost and increase efficiency in a business environment
- Using data and technology to support organisational goals
- Improving team performance to support organisational goals

- Leading and supporting a team through a period of change within the organisation.

As well as the above topics, the EPAO can add further topic areas, provided they cover the relevant KSBs and give adequate opportunity for the apprentice to meet the required 'pass' and 'distinction' grading criteria.

The EPAO will take steps to ensure the apprentice is given a presentation topic, which allows the apprentice the opportunity to draw on what they have learnt and experienced during their apprenticeship.

The purpose of the presentation is to allow the apprentice to demonstrate their competence against the grading descriptors.

The presentation should cover the following themes:

- Data collection and benchmarking
- Problem analysis and conclusions
- People and relationships
- Future plans and opportunities

During the presentation, the apprentice must have access to:

- audio-visual presentation equipment
- a flip chart and writing and drawing materials
- a computer.

The independent assessor must ask questions after the presentation.

The purpose of the questions is:

- to seek clarification where required
- to assess the level of competence against the grading descriptors.

Professional discussion underpinned by a portfolio of evidence

Overview

In the professional discussion, an independent assessor and apprentice have a formal two-way conversation. It gives the apprentice the opportunity to demonstrate the KSBs mapped to this assessment method.

The apprentice can refer to and illustrate their answers with evidence from their portfolio of evidence.

Rationale

This assessment method is being used because:

- it assesses KSBs holistically and objectively
- it allows for the assessment of KSBs that do not occur on a predictable or regular basis
- it allows for assessment of responses where there are a range of potential answers
- it can be conducted remotely, potentially reducing cost.

Delivery

The professional discussion must be structured to give the apprentice the opportunity to demonstrate the KSBs mapped to this assessment method to the highest available grade.

An independent assessor must conduct and assess the professional discussion.

The purpose is to assess the apprentice's competence against the following themes:

- Building a high performing team
- Communicating and implementing operational plans
- Managing change and continuous improvement
- Using technology
- Contributing to a project

The apprentice must have access to their portfolio of evidence during the professional discussion.

The apprentice can refer to and illustrate their answers with evidence from their portfolio of evidence however, the portfolio of evidence is not directly assessed.

Grading

Presentation with questions

Fail - does not meet pass criteria

Theme KSBs	Pass Apprentices must demonstrate all of the pass descriptors	Distinction Apprentices must demonstrate all of the pass descriptors and all of the distinction descriptors
Data collection and benchmarking K3 K5 K15 K20 K21 S3	<p>Outlines the processes and policies supporting the delivery (of the chosen topic) and the regulation, legislation and compliance which impacts their role and the organisation. (K3, K5)</p> <p>Explains how (the chosen topic) considers external factors affecting the workplace, how they are managed, and the influence of the wider social and economic environment in which the organisation operates. (K15, K21)</p> <p>Collates and interprets data and information to create reports tailored to the needs of different audiences. (K20, S3)</p>	<p>Evaluates the impact of external factors and the influence of the wider social and economic environment in which the organisation operates (on the chosen topic). (K15, K21)</p> <p>Evaluates how well the reports they created met the needs of different audiences. (K20, S3)</p>
Problem analysis and conclusions K6 K9 K12 K19 S5	<p>Explains how their role impacts on the organisation's strategy and objectives and the impact that cross team working has on delivering them. (K6, K19)</p> <p>Applies communication techniques, problem-solving and decision-making principles to provide solutions and influence the decision-making process. (K9, K12, S5)</p>	<p>Justifies their selection of communication techniques, problem-solving and decision-making principles to provide solutions and influence the decision-making process. (K9, K12, S5)</p>
People and relationships K11 S9 S15 S17 B2	<p>Explains how they manage and maintain relationships with a diverse workforce and stakeholders, set objectives, monitor progress and provide guidance and feedback for individual and team performances. (K11, S9, S15)</p> <p>Explains how they proactively support the delivery of equity, diversity and inclusion in the workplace and monitor the impact on their team. (S17, B2)</p>	<p>Evaluates the impact in the workplace of promoting an inclusive culture. (S17, B2)</p>
Future plans and opportunities K16 S18 B5	<p>Describes the impact of internal and external factors on their role, identifying how they will work flexibly to adapt to future changes in the sector that may affect their organisation. (K16, S18, B5)</p>	<p>None</p>

Professional discussion underpinned by a portfolio of evidence

Fail - does not meet pass criteria

Theme KSBs	Pass Apprentices must demonstrate all of the pass descriptors	Distinction Apprentices must demonstrate all of the pass descriptors and all of the distinction descriptors
Building a high performing team K1 K2 K10 K17 K23 S2 S4 S12 B1 B4	<p>Describes their approach to identifying and supporting the learning and development needs of team members, as well as seeking out opportunities to develop their own learning and professional development. (K2, S4, B4)</p> <p>Describes the leadership, management and performance management techniques and tools they use to organise, prioritise, and allocate work activities. (K1, K17, S2)</p> <p>Explains their approach to sharing best practice and advising stakeholders on the practical application of regulation and legislation relevant to their work within the organisation. (S12)</p> <p>Explains how they have ethically and inclusively applied policies and procedures relating to people and organisational culture to support equity, diversity, and inclusion in the workplace. (K10, K23, B1)</p>	Evaluates their approach to supporting and promoting equity, diversity, and inclusion in terms of impact on the workplace. (K10, K23, B1)
Communication and implementing operational plans K7 K18 S1 S11 S13 S14	<p>Explains how they use and manage resources and collaborate with stakeholders to implement and deliver operational goals and team plans within their level of responsibility and accountability. (K7, K18, S1, S14)</p> <p>Explains how they communicated the impact of organisational strategy on different stakeholders using different types of media to ensure understanding. (S11, S13)</p>	Evaluates the impact of the techniques they have used to communicate how organisational strategy impacts stakeholders, suggesting improvements to facilitate their understanding of what is required. (S11, S13)
Managing change and continuous improvement K13 K22 S7 S10 S16	<p>Explains how they apply the principles of change management and continuous improvement to work processes to identify areas where performance can be enhanced. (K13, S7)</p> <p>Describes how they negotiate with and challenge stakeholders and others, when managing change, and the activities used to resolve and reduce conflict. (S10, S16)</p> <p>Describes their approach to managing budgets and maximising the use of resources. (K22)</p>	Evaluates the extent to which continuous improvement techniques improve work processes. (K13, S7)
Using technology K14 S8 S19	Describes the technology, software, and methods they use to produce documentation and support activities for the business, and how they monitor their use to reduce energy consumption when not in use. (K14, S8, S19)	None
Contributing to a project K4 K8 S6 B3	Explains how they utilise project management tools and techniques to plan a project, prioritise activities, monitor progress, and take corrective action to deliver against the project plan on time whilst taking ownership of the tasks. (K4, K8, S6, B3)	None

Overall EPA grading

Performance in the EPA determines the overall grade of:

- fail
- pass
- distinction

If the apprentice fails one assessment method or more, they will be awarded an overall fail.

To achieve an overall pass, the apprentice must achieve at least a pass in all the assessment methods. To achieve a distinction overall, the apprentice must achieve a distinction in all assessment methods by meeting all the distinction descriptors.

Grades from individual assessment methods must be combined in the following way to determine the grade of the EPA overall.

Presentation with questions	Professional discussion underpinned by a portfolio of evidence	Overall Grading
Fail	Fail	Fail
Pass	Fail	Fail
Fail	Pass	Fail
Pass	Pass	Pass
Distinction	Pass	Pass
Pass	Distinction	Pass
Distinction	Distinction	Distinction

KSB mapping table

Knowledge	Assessment methods
K1 Performance management techniques.	Professional discussion underpinned by a portfolio of evidence
K2 How to identify the learning needs of others and solutions to address them.	Professional discussion underpinned by a portfolio of evidence
K3 Processes and policies which support the delivery of operational requirements.	Presentation with questions
K4 Project management tools and techniques.	Professional discussion underpinned by a portfolio of evidence
K5 Relevant regulation, legislation, and compliance that impacts their role and the organisation.	Presentation with questions
K6 Organisational strategy and objectives and how their role impacts on them.	Presentation with questions
K7 How to manage resources to implement operational and team plans.	Professional discussion underpinned by a portfolio of evidence
K8 Time management and prioritisation tools.	Professional discussion underpinned by a portfolio of evidence

Knowledge	Assessment methods
K9 Communication techniques including presentation skills, negotiation and influencing skills.	Presentation with questions
K10 Policy and procedure relating to people and organisational culture.	Professional discussion underpinned by a portfolio of evidence
K11 Stakeholder management.	Presentation with questions
K12 Problem-solving and decision-making principles.	Presentation with questions
K13 Principles of change management and continuous improvement.	Professional discussion underpinned by a portfolio of evidence
K14 IT and software used to support the activities of the business.	Professional discussion underpinned by a portfolio of evidence
K15 External factors that affect the workplace, such as sustainability and net carbon zero, and how they are managed.	Presentation with questions
K16 The impact that internal and external factors such as environmental impacts, have on their role.	Presentation with questions
K17 Leadership and management approaches.	Professional discussion underpinned by a portfolio of evidence
K18 The purpose of their role within the organisation, including their level of responsibility and accountability.	Professional discussion underpinned by a portfolio of evidence
K19 The impact that cross-team working has in the delivery of organisational objectives.	Presentation with questions
K20 How to collate, interpret and communicate data and information to meet the needs of different audiences.	Presentation with questions
K21 The wider social and economic environment in which the organisation operates.	Presentation with questions
K22 Approaches to managing budgets, and options and choices to maximise efficient use of resources.	Professional discussion underpinned by a portfolio of evidence
K23 Principles of equity, diversity and inclusion in the workplace	Professional discussion underpinned by a portfolio of evidence

Knowledge	Assessment methods
and their impact on the organisation and the team.	
Skill	Assessment methods
S1 Use resources to implement operational and team plans.	Professional discussion underpinned by a portfolio of evidence
S2 Use tools to organise, prioritise and allocate daily and weekly work activities.	Professional discussion underpinned by a portfolio of evidence
S3 Able to collate and interpret data and information and create reports.	Presentation with questions
S4 Identify and support the development of the team through informal coaching and continuous professional development.	Professional discussion underpinned by a portfolio of evidence
S5 Use information and problem-solving techniques to provide solutions and influence the decision-making process.	Presentation with questions
S6 Use digital tools for planning and project management to monitor project progress, taking corrective action to deliver against the project plan.	Professional discussion underpinned by a portfolio of evidence
S7 Review work processes to identify opportunities to improve performance and for continuous improvement.	Professional discussion underpinned by a portfolio of evidence
S8 Use technology and software to produce documentation, such as spreadsheets and presentation packages to communicate information.	Professional discussion underpinned by a portfolio of evidence
S9 Manage individual or team performance by setting objectives, monitoring progress, and providing clear guidance and feedback.	Presentation with questions
S10 Manage others through change by identifying challenges and the activities to resolve them.	Professional discussion underpinned by a portfolio of evidence
S11 Interpret organisational strategy and communicate how this impacts others.	Professional discussion underpinned by a portfolio of evidence
S12 Interpret and apply regulation and legislation, share best practices, and advise stakeholders on their application.	Professional discussion underpinned by a portfolio of evidence
S13 Communicate information through different media, such as	Professional discussion underpinned by a portfolio of evidence

Knowledge	Assessment methods
face-to-face meetings, emails, reports, and presentations to enable key stakeholders to understand what is required.	
S14 Collaborate with stakeholders in the organisation to ensure the delivery of operational goals.	Professional discussion underpinned by a portfolio of evidence
S15 Manage and maintain relationships with a diverse workforce and stakeholders.	Presentation with questions
S16 Negotiate with and challenge stakeholders to manage change and reduce conflict.	Professional discussion underpinned by a portfolio of evidence
S17 Interpret policy and support the delivery of equity, diversity and inclusion in the workplace and monitor their impact on their team.	Presentation with questions
S18 Identify future changes in the sector such as technology advances that may impact their organisation.	Presentation with questions
S19 Monitor the use of technology and the potential to reduce energy consumption through their optimisation in day-to-day tasks, such as reducing the use of paper and switching off items when not in use.	Professional discussion underpinned by a portfolio of evidence
Behaviour	Assessment methods
B1 Acts professionally, ethically and with integrity.	Professional discussion underpinned by a portfolio of evidence
B2 Supports an inclusive culture, treating colleagues and external stakeholders fairly and with respect.	Presentation with questions
B3 Takes accountability and ownership of their tasks and workload.	Professional discussion underpinned by a portfolio of evidence
B4 Seeks learning opportunities and continuous professional development.	Professional discussion underpinned by a portfolio of evidence
B5 Works flexibly and adapts to circumstances.	Presentation with questions

Mapping of KSBs to grade themes

Presentation with questions

KSBS GROUPED BY THEME	Knowledge	Skills	Behaviour
<p>Data collection and benchmarking K3 K5 K15 K20 K21 S3</p>	<p>Processes and policies which support the delivery of operational requirements. (K3) Relevant regulation, legislation, and compliance that impacts their role and the organisation. (K5) External factors that affect the workplace, such as sustainability and net carbon zero, and how they are managed. (K15) How to collate, interpret and communicate data and information to meet the needs of different audiences. (K20) The wider social and economic environment in which the organisation operates. (K21)</p>	<p>Able to collate and interpret data and information and create reports. (S3)</p>	<p>None</p>
<p>Problem analysis and conclusions K6 K9 K12 K19 S5</p>	<p>Organisational strategy and objectives and how their role impacts on them. (K6) Communication techniques including presentation skills, negotiation and influencing skills. (K9) Problem-solving and decision-making principles. (K12) The impact that cross-team working has in the delivery of organisational objectives. (K19)</p>	<p>Use information and problem-solving techniques to provide solutions and influence the decision-making process. (S5)</p>	<p>None</p>
<p>People and relationships K11 S9 S15 S17 B2</p>	<p>Stakeholder management. (K11)</p>	<p>Manage individual or team performance by setting objectives, monitoring progress, and providing clear guidance and feedback. (S9) Manage and maintain relationships with a diverse workforce and stakeholders. (S15) Interpret policy and support the delivery of equity,</p>	<p>Supports an inclusive culture, treating colleagues and external stakeholders fairly and with respect. (B2)</p>

KSBS GROUPED BY THEME	Knowledge	Skills	Behaviour
		diversity and inclusion in the workplace and monitor their impact on their team. (S17)	
Future plans and opportunities K16 S18 B5	The impact that internal and external factors such as environmental impacts, have on their role. (K16)	Identify future changes in the sector such as technology advances that may impact their organisation. (S18)	Works flexibly and adapts to circumstances. (B5)

Professional discussion underpinned by a portfolio of evidence

KSBS GROUPED BY THEME	Knowledge	Skills	Behaviour
Building a high performing team K1 K2 K10 K17 K23 S2 S4 S12 B1 B4	Performance management techniques. (K1) How to identify the learning needs of others and solutions to address them. (K2) Policy and procedure relating to people and organisational culture. (K10) Leadership and management approaches. (K17) Principles of equity, diversity and inclusion in the workplace and their impact on the organisation and the team. (K23)	Use tools to organise, prioritise and allocate daily and weekly work activities. (S2) Identify and support the development of the team through informal coaching and continuous professional development. (S4) Interpret and apply regulation and legislation, share best practices, and advise stakeholders on their application. (S12)	Acts professionally, ethically and with integrity. (B1) Seeks learning opportunities and continuous professional development. (B4)
Communication and implementing operational plans K7 K18 S1 S11 S13 S14	How to manage resources to implement operational and team plans. (K7) The purpose of their role within the organisation, including their level of responsibility and accountability. (K18)	Use resources to implement operational and team plans. (S1) Interpret organisational strategy and communicate how this impacts others. (S11) Communicate information through different media, such as face-to-face meetings, emails, reports, and presentations to enable key stakeholders to understand what is required. (S13) Collaborate with stakeholders in the organisation to ensure the delivery of operational goals. (S14)	None
Managing change	Principles of change	Review work processes to identify	None

KSBS GROUPED BY THEME	Knowledge	Skills	Behaviour
and continuous improvement K13 K22 S7 S10 S16	management and continuous improvement. (K13) Approaches to managing budgets, and options and choices to maximise efficient use of resources. (K22)	opportunities to improve performance and for continuous improvement. (S7) Manage others through change by identifying challenges and the activities to resolve them. (S10) Negotiate with and challenge stakeholders to manage change and reduce conflict. (S16)	
Using technology K14 S8 S19	IT and software used to support the activities of the business. (K14)	Use technology and software to produce documentation, such as spreadsheets and presentation packages to communicate information. (S8) Monitor the use of technology and the potential to reduce energy consumption through their optimisation in day-to-day tasks, such as reducing the use of paper and switching off items when not in use. (S19)	None
Contributing to a project K4 K8 S6 B3	Project management tools and techniques. (K4) Time management and prioritisation tools. (K8)	Use digital tools for planning and project management to monitor project progress, taking corrective action to deliver against the project plan. (S6)	Takes accountability and ownership of their tasks and workload. (B3)