CIPD

Level 7 Senior People Professional End-point Assessment (EPA)

Guidance for the Project Proposal, Presentation and Questioning

Issue 2

Contents

Introduction

Assessment method 2 of the end-point assessment (EPA) is made up of two assessment components:

1   project proposal
2   presentation with questioning.

The purpose of this document is to provide guidance for assessment method 2 to apprentices, employers and training providers. It gives guidance on how to approach and produce the project proposal and how to prepare for the presentation and questioning. It will also be useful for your employer and training provider when considering how they can best support you.

The project proposal is written after you have gone through the gateway. The title and scope of the project proposal will be signed off by CIPD at gateway to confirm its suitability. You will have 12 weeks to research, write and submit the project proposal. You will need senior leadership commitment to support your proposal and to sign it off for implementation before it is submitted for EPA.

The presentation (based on parts of the project proposal) is produced when writing your project proposal. You will submit any materials for the presentation at the same time as the project proposal.

The total time for the presentation and questioning is 60 minutes:

* The presentation should last approximately 20 minutes.
* The questioning should last 40 minutes.

The project proposal and documents relating to the presentation will need to be uploaded to the documents section in SmartEPA (SEPA) 21 days before the date of assessment.

For further guidance on gateway sign-off and timings, please refer to the Level 7 Senior People Professional Gateway Submission document.

Abbreviations used

* GD(s): grading descriptors outlined in the assessment plan and at the end of this document.
* KSB(s): knowledge, skill and/or behaviour component(s), as outlined in the apprenticeship standard.
* EPA: end-point assessment.

Requirements for assessment method 2 set out in the assessment plan

These are the requirements set out in the assessment plan for this apprenticeship. The assessment indicates how the apprenticeship will be assessed through the EPA:

- Apprentices need to complete a significant, relevant and defined project or piece of work that has real business application and benefit and can be written up as a project proposal.
- The resulting project proposal needs to be scoped and designed so that it is relevant to the apprentice's role and enables the apprentice to evidence all the KSBs for assessment method 2.
- The project proposal does not need to be fully implemented during the EPA period, but it must be a comprehensive proposal that will enable full implementation at an appropriate time for the organisation.
- Apprentices must complete the project proposal and presentation unaided.
- The project proposal must be signed off at senior leadership or board level for implementation.
- Evidence from the project proposal and the presentation with questioning will be assessed holistically, that is, assessors will draw on relevant evidence from both components to assess each GD and its KSB components.

Project proposal guidance

The project proposal is used to assess eight grading descriptors (GDs) and associated knowledge, skill and behaviour components (KSBs). It is important that you follow the recommendations and guidance provided in this document when deciding how to approach your project proposal. This will give you the best opportunity to provide evidence for all the GDs assessed in assessment method 2.

You will need to ensure that you have senior leader or board-level support for your project and that your project proposal is signed off for implementation before it is submitted. Below is guidance on the type of project that may be suitable and the recommended structure of your project proposal.

Generic specification of projects

The following examples are types of project that would be suitable to write up for the project proposal. This is not an exhaustive list but provided as guidance. All project titles and scopes will be signed off at gateway:

1   You could review a current people approach, service or product to ensure it is still fit for purpose and meets the needs of the business.

Specific examples could be:

Review your organisation's approach (or business area/division/department if a large organisation) to one of the following areas:

- workforce planning
- employee experience
- wellbeing
- an area of reward or benefits
- performance management
- an area of ER
- an area of learning and development
- an area of organisation development or design.

2   You could review a key organisational people policy (for example, flexible working or diversity & inclusion).

3   You could review organisational culture or capability (or business area/division/department if a large organisation).

4   You could review a learning programme or platform.

5   You could develop a change approach and plan to improve a people solution within the workplace. People change approach could be for:
- a significant restructure
- an acquisition/merger/divestment
- TUPE
- the introduction of new technology, AI or automation.

6   You could plan and design a project that has strategic relevance.

This could be an HR, OD or L&D strategy to support a change in organisation/business strategy or culture.

Structure of the project proposal

The project proposal needs to be evidence-based and include fully developed conclusions, implementation plan and recommendations.

The project proposal needs to be 7,000 words (+/− 10%), including tables, graphs and figures but excluding references and annexes.

The table below and the project proposal template outline the recommended structure and content for your project proposal. There are nine sections, each of which have suggested content to include and a recommended word count. To meet the requirements of the GDs, aim to cover all of the content indicated in the suggested content column. When completing your project proposal, you may find that your project does not exactly fit these sections or word count recommendations. Projects will vary in nature and scope, and therefore variation in the way they are written up is to be expected. This structure is there to support you as guidance and should not limit or constrain your project.

. There is a template for sign-off at the end of the project proposal template. Alternatively, you may submit another form of evidence that shows the project proposal has been approved. This could be an email, meeting minutes, a signature on internal documentation, etc. We recommend that you ensure you have commitment from senior leaders to review your project proposal at gateway.

The project proposal must include an annex showing how the project proposal maps to the GDs and associated KSBs. The project proposal template indicates how to map to the GDs.

Section	Suggested content	Approximate word count
Title page	Title of the project proposal Apprentice's name	
Table of contents	A table of contents or index showing the sections and their page number(s)	
1 Executive summary	A high-level summary of the key points in the project proposal to encourage the target audience to read the full report, covering: • the scope, definition and purpose of the project • why it is important • key objectives/outcomes • summary of methodology • overview of key conclusions and findings • summary of approach/timeline for implementation • overview of key recommendations	600
2 Introduction	A short section introducing the project and placing it in an organisational and broader context. This section needs to show how the project seeks to address an organisation/business need and links to wider people/business/organisation strategy.	400

Section	Suggested content	Approximate word count
3 Scope	A definition of the project, its key dimensions and purpose. Answer all of the following questions: • Which area(s) of HR, OD or L&D is the project focused on and which service/product/approach (if relevant)? • What level is the project, for example, organisational or business/department level? • What is the purpose of the project? • Why is change needed or why is it important to question the existing practice/policy/approach? • What KPIs could be impacted positively or negatively? • How many people are impacted and over what timescale? • Are there any other key dimensions, such as organisational costs or budget? • What is out of scope?	600
4 Objectives	Define the specific objectives and/or outcomes of the project and explain why these are important to the organisation.	400
5 Research design and Methodology	Describe the work undertaken and methods used to gather data and evidence. Answer all of the following questions: • Which stakeholders did you involve and how? How did you ensure you understood different stakeholder needs? • Who did you collaborate with and how? • What diagnostic tools and consulting techniques did you use? Why did you select these? • What qualitative and quantitative data or metrics did you gather and how? • What other forms of evidence did you gather and how (for example, external research or benchmarking data)?	700
6 Analysis, evaluation and findings	Present your quantitative and qualitative data and evidence visually in tables, graphs, charts or infographics with narrative explaining how you analysed and evaluated the data and evidence, what this shows and your findings. (If needed, you can present additional data or evidence in the annex.) Answer all of the following questions: • How did you analyse this data and evidence? What analytical tools or methods did you use? Why did you choose these?	1,400

Section	Suggested content	Approximate word count
	• What insights did you gain from the analysis? • What themes and connections did you identify between different sources of data and/or evidence? How did you do this? • How did you pull together and balance the different sources of evidence and data to draw your findings? • What are your key findings from your analysis and evaluation? • What are the limitations of how data has been gathered, analysed, interpreted, and presented in the project proposal? • What other data or analysis would have been beneficial to inform your recommendations?	
7 Conclusions	Present your conclusions and explain how they connect to your methodology and analysis, evaluation and findings. Answer all of the following questions: • What are your conclusions drawing from your analysis, evaluation and findings, and methodology? • What themes and connections in your findings informed your conclusions? • Why are these important? • How do they relate to the objectives and scope of the project?	600
8 Recommendations	Present your key recommendations for the way forward, for example, actions to change, do something differently or to strengthen/develop the existing approach, and outline the potential benefits that will be delivered. It is important that the recommendations clearly connect with the rest of the proposal. Answer all of the following questions: • What are your practical recommendations for the way forward? • How do your recommendations link to your conclusions and findings from your analysis of data and evidence? • How will these recommendations deliver benefit and add value, at what level and over what timescale? • What could happen if the project recommendations aren't implemented? • How will the impact and value added by the recommendations be measured? • How do these recommendations link to wider people/business/organisation strategy?	900

Section	Suggested content	Approximate word count
9 Proposed implementation plan and approach to change	Provide a detailed implementation plan with a timeline showing how your proposal will be fully implemented. In addition, explain your proposed approach to change management, stakeholder management and communication, and incorporate key activities into the implementation plan. Answer all of the following questions: • How have you planned for your proposal to be implemented and over what timescale? Who will be involved? What are the costs? What resources will be needed? • How will you manage any implementation risks? • What is your proposed approach to change? Which change management methodologies, tools or theories have informed this? What other evidence did you draw on? How does this compare with your organisation's usual approach to change? • What alternative approaches/options did you consider for implementation or change management? What are their advantages and disadvantages? • Who are the key stakeholders for the implementation? • How will the proposal/change affect and impact on the workforce and wider organisation? • How will you engage, involve and manage key stakeholders during implementation? • How will you embed this approach in the longer term so it becomes business as usual?	1,400
Word count	Please include your total word count at the end of your recommendations. It needs to be between 6,300 and 7,700 words	
Annexes	In Annex 1, you need to show how the content of the report maps to the Grading Descriptors. This has been partially completed but you may add any other relevant sections where there is evidence of each GD. In Annex 2, you need to provide evidence that your project proposal has been signed-off for implementation by a senior leader or Board member References	Not part of word count

Guidance on the presentation and questioning

Your presentation will be based on work you have done to develop the project proposal. As with the project proposal, it needs to be evidence-based and include fully developed plans and recommendations where appropriate.

The purpose of the presentation is to give you the opportunity to expand on your approach in particular aspects of your project proposal and to give you the opportunity to demonstrate depth and breadth against particular GDs from this assessment method.

The questioning will cover all GDs assessed in this assessment method and is an opportunity for you to showcase your competence and excellence. Your assessor will ask questions that focus on specific GDs and you will have the opportunity to expand on the approach taken in your project proposal.

The delivery of the presentation should last approximately 20 minutes.

We recommend using one of the following formats to create your presentation:

- Microsoft PowerPoint (or similar presentation software) .pptx
- Microsoft Word (or similar software) .docx

If you would prefer to use an alternative format, please get in touch with **MyEPA@cipd.co.uk** to discuss. We will always seek to accommodate reasonable requirements and adjustments.

A suggested structure is given below to help you when designing your presentation.

The questioning will last approximately 40 minutes.

Your assessor will ask questions designed to give you the opportunity to present evidence against the GDs.

Permitted documents

You should bring your project proposal to refer to when responding to your assessor's questions.

You may also bring:

- notes you have made in preparation
- blank paper for making notes during the assessment.

You will not be permitted to use electronic communication devices other than that with which you are accessing the assessment for security purposes.

Presentation and questioning assessment

The presentation and questioning are conducted over a video call. The video call will be scheduled for 1 hour and 45 minutes. This will allow 20 minutes for the presentation, 40 minutes for the questioning, 30 minutes for a break and 15 minutes for introductions and goodbyes.

Preparation

We recommend that you find a suitable room that you can have exclusive use of to ensure the assessment is uninterrupted.

You will be able to log into the video call 5 minutes before the scheduled start time.

We recommend that you check your hardware, software and the meeting link the day before the assessment. Checks may include checking the meeting link, your microphone, speakers and camera. You may also want to check how to present any documents you are using for your presentation.

A comfortable headset with microphone is useful and often preferable, as it can help eliminate external noises.

You will need to bring photographic ID to confirm your identity at the start of the assessment.

On the day

The presentation will start with an introduction from the assessor.

The assessor will outline the structure of the assessment, when breaks are scheduled and what will be covered.

The assessor will explain that the assessment will be recorded for quality assurance purposes, ask to see your photographic ID and confirm your chosen option: HR, L&D or OD.

The assessor will ask whether you have any questions before you start the assessment.

You will have approximately 20 minutes for your presentation.

After your presentation you will have a break of 30 minutes. You will need to mute your microphone and turn your camera off but stay logged into the video call.

Your assessor will confirm what time to return for the questioning part of the assessment.

The assessor will usually ask an overall question, then probe for more information as necessary. Their role is to make sure they ask questions that allow you the opportunity to demonstrate your evidence for the grading descriptors.

If they feel they have enough evidence, or if you are giving evidence that isn't directly relevant to the question being asked, they may stop you and ask a different question. Please don't worry about this; it's just to ensure that the time is being utilised to give you the best opportunity to showcase your evidence.

At the end of the assessment, the assessor will explain the next steps.

If there are any technical difficulties on the day of the assessment, the assessor will call you on your preferred telephone number to find a solution and complete your assessment.

Next steps

The assessor will review the evidence provided in the project proposal, presentation and questioning and make their ratings against the grading descriptors. They will submit their ratings, which are subject to internal quality assurance procedures.

Once internal quality assurance is complete, results will be released to the SmartEPA (SEPA) platform.

Results will usually be released within three weeks of the assessment.

Top tips for the presentation

These tips may be useful as a reminder when preparing for your presentation:

- You should aim to tailor your presentation to suit your own style, yet be mindful of the 'formality' of the assessment environment.

- Practise delivering your presentation with an audience and get feedback.

- Practise delivering your presentation via video conferencing – check that you know how to share your screen and manage your documents and the software.

- Practise delivering your presentation precisely to time – approximately 20 minutes.

Project proposal, presentation and questioning scoring and grading

After the assessment, the assessor will evaluate all the evidence presented in the project proposal, presentation and questioning and provide a rating for each grading descriptor.

They will give one of four ratings to each GD.

Not met
Partially met
Met
Exceeded

To achieve a pass grade for the project proposal, presentation and questioning, you will need a rating of 'met' or 'exceeded' in **every** pass level grading descriptor.

To achieve a distinction grade for the project proposal, presentation and questioning, you will need a rating of 'met' or 'exceeded' in **every** grading descriptor across both pass and distinction levels.

5 Pass	=	Pass
3 Distinction	=	Distinction

Evidence presented in assessment method 1 cannot be used to rate GDs in this assessment method. All evidence must come from the project proposal, presentation and questioning.

Structure of the presentation

The assessor will review the presentation alongside your project proposal, so you **do not** need to summarise the whole project proposal in your presentation. Instead, we recommend you focus the presentation on particular elements of the project proposal. The suggested content below indicates what we recommend you focus on in your presentation. If you aim to answer all the questions in the suggested content, you will give yourself the best chance of presenting evidence against the GDs. *This has been developed as a guide that indicates how the GDs may be addressed. Apprentices may take a different approach depending on the nature of their project proposal.*

Section	Suggested content	GDs	Indicative timing
1 Intended outcomes of the project proposal	• What are the intended outcomes of your project? • Why are these important for your organisation/business area/department? • What are the drivers for change?	PPP2	3–3.5 mins
2 Planning for the project proposal	• How did you ensure you took an inclusive approach to developing your proposal? • How did you work across organisational boundaries? • How did you work across different cultures? • How will you take an inclusive approach to implementing and embedding your recommendations?	PPP3	5–6 mins
3 Rationale for activities	• What were your reasons for taking the proposed approach to change and implementation? • What did you consider from a people perspective?	PPP2 PPD2	3–3.5 mins
4 Senior leader or board sign-off	• How did you gain the support of senior leaders or board members for your project proposal? • What influencing techniques and styles did you use and why? • In terms of the influencing techniques and styles you used, what went well and what could have been improved?	PPP5 PPD5	5–6 mins
5 Further recommendations	• Based on the work you have undertaken, what recommendations do you have for how wider organisational/people practices could be improved (including change management)?	PPD1 PPD2	2 mins

Questioning after the presentation

After your presentation, there will be a break followed by approximately 40 minutes of questioning.

The purpose of the questioning is to seek clarification of the project proposal and/or presentation and to assess the depth and breadth of the evidence for each GD and associated KSBs.

We recommend you prepare by re-familiarising yourself with the detail in your project proposal. It is important that you are ready to explain your approach and thinking behind their project proposal and presentation.

You can also prepare by reviewing the grading descriptors for this assessment method. Remember, each GD for assessment method 2 starts with a command verb, for example, justifies or evaluates. To support you, the CIPD have defined these verbs to explain what is expected in terms of the type and nature of the evidence. The definitions can be found in the Level 7 Senior People Professional Specification and at the end of this guidance.

The format and structure of the questions will relate directly to the GDs where the assessor needs further clarity, and so the structure of the questioning will not always be the same. It is likely that the apprentice will have the opportunity to discuss the evidence for each GD in more detail.

Grading descriptors

Code	Grade	KSBs	Grading descriptor
PPP1	Pass	K4 S5 B7	Synthesises qualitative and quantitative data they identified and gathered, balanced with other relevant metrics, to reach evidence based, sustainable recommendations that demonstrate added value.
PPD1	Distinction	K4 S5	Critically evaluates analytical tools used to create value for the organisation.
PPP2	Pass	K6 S7i	Justifies the approach taken when articulating the need for change and questioning accepted practices, drawing on relevant change methodologies, tools and the psychology and impact of change when communicating their recommendations.
PPD2	Distinction	K6 S7i	Evaluates existing organisational practices and the long-term impact of change on the workforce to create value for the organisation.
PPP3	Pass	K8 S9 B4	Explains how they ensure people and policy practices are inclusive and how they work across organisational and cultural boundaries, evaluating the effect on individuals, groups and the organisation.
PPP4	Pass	K10 S11 B6	Justifies their selection and application of consulting processes, styles and diagnostic tools, explaining how they identify themes and connections to gain insight into wider issues.
PPP5	Pass	S14i	Justifies their approach to gaining support for their proposal from senior leaders/board members and explains how this helps position the people strategy at the heart of the organisation.
PPD5	Distinction	S14i	Critically reflects on the range of influencing styles and strategies to secure senior leader /board commitment.

Taxonomy

This taxonomy outlines the expected style and depth of response that should be given when different command words are used within a grading descriptor (GD). Command words are an indication only and must be considered in conjunction with the GD content to understand the evidence expectations.

This taxonomy is based on a hierarchy of cognitive skills: generally the higher the cognitive skill, the greater the complexity expected in the response.

Command word	Definition
Identifies	Recognises or indicates the main features or purpose of the given topic.
Describes	Gives a detailed account of something, such as steps in a process or characteristics.
Details	As Describes, but with greater detail and specifics.
Presents/Demonstrates	Communicates clearly (and accurately) the key features, elements or messages.
Explains	Provides reasons and/or evidence to justify their points, covering 'why' rather than just 'how' or 'what'.
Evaluates	Considers and weighs up a range of evidence* to provide reasoned recommendation(s)/conclusion(s) and, if appropriate, balances advantages and disadvantages.
Analyses	Examines, explores and interprets each component or area of evidence to identify trends, themes or connections between them.
Justifies	Gives valid reasons for why an approach/action is undertaken.
Critically Analyses	As Analyses, but also articulates the limitations of the components or evidence areas and suggests how these could be improved or developed.
Critically Evaluates	Articulates the advantages, disadvantages and limitations of the approach/tool/model and provides specific suggestions as to how it could be improved.
Critically Reflects	Reviews past actions/approaches with perspective to identify learning that can inform future practice and alternative approaches.
Synthesises	Presents, connects and balances a range of evidence* to identify insights.

* Evidence sources include:

- scientific literature
- organisational data
- expertise and judgement of practitioners, managers, consultants and business leaders
- views of stakeholders, both internal (employees, managers, board members) and external (suppliers, investors, shareholders).

Further information on evidence-based practice can be found in the Apprentice Resource Pack.