

CIPD



Level 5 Learning and Development Business Partner End-point Assessment (EPA)

Specification

Issue 2

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Introduction

CIPD is the professional body for experts in people at work. For more than 100 years, we've been championing better work and working lives by setting professional standards for HR and people development, as well as driving positive change in the world of work.

With hubs in the UK, Ireland, Middle East and Asia, we're the career partner of choice for over 160,000 members around the world. We're the only body in the world that can award chartered status to individual HR and L&D professionals, and our independent research and insights make us trusted advisers to governments and employers.

CIPD has been closely involved in the development of the apprenticeship standards within HR and L&D and is a registered end-point assessment organisation (EPAO) for these standards.

As an EPAO, it is our job to ensure that we uphold the rigorous standards of independent assessment to ensure all apprentices demonstrate occupational competence on completing their apprenticeship.

Apprenticeship standard and assessment plan

The Level 5 Learning and Development Business Partner Apprenticeship ST0563 and the associated assessment plan were developed by the L&D and HR trailblazer employer group and is maintained by the Institute for Apprenticeships and Technical Education (IfATE).

Full details can be found on the [Institute's website](#).

Maximum funding: £7,000

EQA provider: Ofqual

Typical on-programme duration: 18 months

Typical EPA period: 5 months

Grades: Fail, Pass, Merit, Distinction

Assessment methods: EPA 1: Work based project with professional discussion
EPA 2: Presentation and Q&A based on a learning journal

Occupation summary

Learning and development consultant business partner is accountable for ensuring Learning and development contributes to, and influences, improved performance in the workplace at an individual, team and organisation level. They also have the commercial responsibility to align learning needs with the strategic ambitions and objectives of the business. They are agents for change, influencing key stakeholders, making decisions and recommendations on what the business can or should do in an Learning and development context. They are also likely to lead on any Learning and development -related elements of business projects. The learning and development consultant business partner will often have expertise and competence in a specific field whether it be technical, vocational or behavioural. They link the work they do to the context and strategic priorities of the business and measure the outcomes and impact of any learning interventions, to demonstrate a return on investment and expectation.

The role can be a generalist learning and development or more specialist, where the focus and in-depth expertise is in a specific area such as organisation development, digital and blended learning, resourcing, or talent management. Whichever the area of focus, the role requires a good grounding across all areas of Learning and development, and is business and future focused.

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 an 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.

Gateway

The EPA period should only start once the employer is satisfied that the apprentice is consistently working at or above the level set out in the occupational standard - that is to say, they are deemed to have achieved occupational competence. In making this decision, the employer may take advice from the apprentice's training provider(s), but the decision must ultimately be made solely by the employer. In addition to the employer's confirmation that the apprentice is working at or above the level of the occupational standard, the apprentice must have achieved English and mathematics at Level 2 or above.

For those with an education, health and care plan or a legacy statement, the apprenticeship's English and mathematics minimum requirement is Entry Level 3.

British Sign Language (BSL) qualifications are an alternative to English qualifications for those who have BSL as their primary language.

For EPA 1 there is a professional discussion underpinned by a work based project which will be required to be submitted ahead of the assessment.

For EPA 2 the apprentice will deliver a 25 minute presentation to the assessor that will be followed up by a Q&A

At Gateway the apprentice is also required to submit a complete and signed off learning journal to confirm their occupational competence. The apprentice must also submit permission for the recording of the professional discussion, presentation and questioning and for the CIPD to apply for the apprenticeship certification on their behalf.

Assessment methods

The EPA period spans a total of 5 months; at month 4 the apprentice will submit their work based project prior to the presentation and Q&A. The presentation and Q&A takes place on the fifth month.

EPA 1: Work based project with professional discussion

This assessment will take the form of a Work Based Project followed by a professional discussion, which will draw out the best of the apprentice's competence and excellence and cover the grading descriptors and associated knowledge, skills and behaviours (KSBs) assigned to this assessment method. The work based project should be submitted 21 days prior to the Professional Discussion.

Duration: 75 minutes (+10%)

Location: Via video conferencing

Participants: Assessor, Apprentice

Grades: Fail, Pass, Distinction

EPA 2: Presentation and Q&A on learning journal

The Learning Journal that is submitted at Gateway will give the Assessor an impression of the apprentice's critical thinking skills, how they've developed and achieved against the different areas of competence set out in the standard and to glean personalised information for preparing questions.

Apprentices will prepare and deliver a presentation that, along with the learning journal, appropriately covers the grading descriptors and associated KSBs assigned to this method of assessment. It will be followed by questioning from the assessor.

Duration: Presentation - 25 minutes (+10%)

Questioning - 35 minutes (+10%)

Word count: Learning journal - Not Applicable

Location: Remote, via video conferencing

Participants: Assessor, Apprentice

Grades: Fail, Pass, Distinction

Rating

Each KSB will be rated using the following categories:

Not met
Partially met
Met

The descriptors indicate how the ratings will be applied for each grading descriptor.

Rating	Descriptor
Not met	The apprentice has provided no evidence that is relevant to the KSBs. The evidence does not demonstrate the breadth and depth of competence expected.
Partially met	The apprentice has provided limited evidence relevant to the KSBs. There are key evidence gaps, so the evidence does not demonstrate the breadth and depth of competence expected.
Met	The apprentice has provided acceptable evidence for the KSBs. There is some evidence for all elements of the KSB and most of the elements are fully evidenced, demonstrating the breadth and depth of competence expected.

Grading

Grading the assessment methods

This EPA is composed of two assessment methods, each of which is graded using the following schema.

Fail
Pass
Distinction

To achieve a pass grade for each assessment method, apprentices must achieve a rating of ‘met’ in every KSB for that assessment method.

To achieve a distinction grade for each assessment method, apprentices must achieve a rating of ‘met’ in every KSB for that assessment method and meet all of the distinction criteria for that assessment method.

Grading the overall EPA

Each assessment method is graded individually. Evidence presented in one assessment method cannot be used to rate grading descriptors in the other assessment method.

Apprentices must achieve a pass in both in order to pass and a distinction in both in order to be awarded a distinction.

The grading rules are shown in the following matrix where a higher level of weighting is applied for EPA 1.

EPA1 grade	EPA 2 grade	EPA grade
Fail	Any grade*	Fail
Any grade*	Fail	Fail
Pass	Pass	Pass
Pass	Distinction	Pass
Distinction	Pass	Merit
Distinction	Distinction	Distinction

Support material

More information and guidance is contained within the Level 5 Learning and Development Business Partner support materials, which include:

- L5 L&D Guide to EPA
- L5 L&D Professional Discussion Guide EPA1
- L5 L&D Presentation and Q&A Guide EPA2
- Apprentice Frequently Asked Questions (FAQs)
- SmartEPA Support Documents

This list is not exhaustive and you may find helpful further guidance on the [website](#).

Resits/retakes

Apprentices who fail one or more assessment method(s) will be offered the opportunity to take a resit or a retake at the employer's discretion. The apprentice's employer will need to agree that either a resit or retake is an appropriate course of action and will be responsible for the reassessment fees and any additional training costs. A resit does not require further learning, whereas a retake does.

Where apprentices have failed one assessment method but have the necessary evidence or can acquire the necessary evidence within the resit period, they may resit that assessment method only.

Where apprentices have failed both assessment methods, a retake is advised.

Employers should develop a supportive action plan with the apprentice, drawing on the assessment feedback, to help their apprentice prepare for either a resit or a retake.

The timescale for a resit/retake will be agreed between the employer and EPAO. A resit is typically taken within two months of the EPA outcome notification.

- Resit for EPA1 is typically 2 Months from the date the results is published
- Resit for EPA2 is typically 1 Month from the date the results are published

The timescale for a retake is dependent on how much additional learning is required.

Pass, merit and distinction grades are available for resit/retake assessments.

Resits and retakes are not available for apprentices who have achieved a pass grade.

For further information please review Resit and Retake policy accessible via the CIPD [website](#).

EPA fees

The maximum funding for this apprenticeship is £7,000 and EPA fees have been set bearing in mind ESFA funding rules. EPA fees for the first assessment of the Level 5 Learning and Development Business Partner Apprenticeship are:

First assessment: £1,260

Resit (either assessment method): £630

Retake is the full cost of EPA £1,260

CIPD Membership

At CIPD we believe completing an apprenticeship is a huge achievement and should come with professional recognition. For that reason, any apprentice who successfully completes their End Point Assessment with CIPD will be immediately eligible to come into CIPD membership.

Find out more on our [website](#).

Grading descriptors and KSBs

EPA 1: Work based project with professional discussion

The following KSBs and Grading Descriptors are assessed in the work based project with professional discussion .

KSBs

Code	KSB
K1	Paradigms, theories and models that underpin effective adult learning, group behaviour and learning culture, for example behaviourism, cognitivism, constructivism, neuroscience
K5	Positively incorporating diversity and inclusion into L&D interventions and processes. Researching and applying current best practice in this area.
K6	Change management methodologies, and the principles of project management
K7	Consultancy tools and techniques, for example the use of SWOT, 5 Whys, weighted matrix etc, providing costed recommendations and projected impact / ROI/ ROE
K8	Their organisation's vision, mission, values, strategy, plans and stakeholders; its external market and sector and the opportunities and the challenges and issues it faces. This may include an organisation's sustainability strategy or exposure to the UK Government's policy for net carbon zero emissions by 2050.
K9	How business, learning and HR key performance indicators and metrics build a clear picture of how the business is performing
K10	The process of stakeholder mapping to define interactions with staff that are part of the learning needs analysis, design, delivery, and evaluation. This may include the needs of staff impacted by the move to a net carbon zero economy by 2050 and the requirements for a just transmission.

K11	How to measure the impact, return on investment/expectation of learning on the business
K15	How to prepare, monitor and manage a budget
K16	The collection of data and information, both qualitative and quantitative, to analyse learning needs, implement effective delivery and measure outcomes and impact.
K17	How to identify sources, trends and anomalies in data/information
S1	Work as an L&D business partner or consultant across the whole organisation or key functions / relevant stakeholders as appropriate, to build insight into existing levels of capability against future requirements, identifying organisational skills gaps and risks
S2	Use a range of techniques to obtain an initial brief from internal stakeholders, and investigate and analyse data to validate the need for a learning intervention
S3	Present a range of relevant and innovative solutions, logically and with credibility, to gain buy-in from senior stakeholders
S5	Initiate the design of interventions and monitor implementation
S9	Influence management at all levels to collaborate and take responsibility for learning initiatives
S12	Construct and manage an L&D budget/project/intervention, including managing the resources to effectively deliver
S13	Identify and analyse potential cost savings to ensure maximum value
S15	Build effective working relationships with business managers (using the language of the business), peers and other L&D functions, together with relevant external organisations to deliver business results from L&D plans and solutions
S19	Employ a range of questioning and listening skills to generate brainstorming, discussion and debate, learning and decisions
B2	Probing and inquiring to delve deeper into opportunities, options and solutions
B5	They are a trusted partner, acting with integrity, ensuring that clients, partners and learners alike feel heard and confident in their ability to deliver

B7	They understand and apply the commercial context, realities and drivers behind learning needs and solutions. This may include an organisation's sustainability strategy or exposure to the UK Government's policy for net carbon zero emissions by 2050, for example, ensuring a just transition for those with legacy skills into the new green economy.
B8	They are focused on outcomes and impacts
B9	They develop ideas, insights and solutions for defined business benefits. This may include an organisation's sustainability strategy or exposure to the UK Government's policy for net carbon zero emissions by 2050, for example, ensuring a just transition for those with legacy skills into the new green economy.

Grading Descriptors - Pass Level

KSB	Grading Descriptor
K6, K7, K10, K11, K16, S1, S3, S5, S9, S12, B9	Has produced a project report that covers an end-to-end consultancy project process, including each of the key elements: analysis, research, option development, consultation/ collaboration, implementation and evaluation. (K6, K7, K10, K11, K16, S1, S3, S5, S9, S12, B9)
K8, K9, K16, B7, B8, B9	Demonstrated that the project has a clear link between the business problem/requirements and the recommendations/ solution delivered, and provides evidence that the project was designed to meet those. (K8, K9, K16, B7, B8, B9)
K8, B7, B9	Has articulated in the report an understanding of organisation's vision, mission, values, strategy, plans, stakeholders, customers and competitors and consideration of these when undertaking the project (K8, B7, B9)
K1	Referenced at least 3 recognised theories/models that underpin effective adult learning in project report, and provides evidence that the project uses those (K1)
K7, K10, K16, S1, S2, S9, S15, B5, S19, B2	Provides evidence that during project delivery that they analysed the problem, this should include demonstrating significant communication, collaboration and consultation with relevant business stakeholders to understand the requirements of the business/team (K7, K10, K16, S1, S2, S9, S15, B5) - using at least 3 appropriate consultancy and questioning techniques to do so (K7, S19, B2). For example the report or annexes shows use of tools to deliver this like SWOT, 5 Whys, brainstorming sessions, organisational needs analysis, etc
K5, K8, K9	Can articulate how they conducted relevant background research and why this is important e.g. they have considered business requirements/metrics/implications, L&D/industry developments, any regulatory or equality and diversity requirements (K5, K8, K9)
K16, K17	Demonstrates that they collected appropriate data and information and conducted relevant data analysis as part of the project (K16, K17) For example, key performance indicators and metrics, benchmarking data, qualitative and quantitative data
K6, K15, S12, S13, B7	Has considered and planned for budgetary/resource requirements (K6, K15, S12, S13, B7)
K5, S3, B2, B7, B9	Evidences that they have researched and developed costed options/ideas for potential solutions, giving reasoned explanations as to their inclusion or rejection, this should include reference to consideration of any equality and diversity requirements (K5, S3, B2, B7, B9)

K6, S5	Describes how they implemented the solution, using appropriate project management, and if relevant, change management principles to monitor (K6, S5)
K6, K7, K11, K16, S5, B8	Has demonstrated that the project outcomes are implemented in a way that means measurement of the success of those outcomes is possible (K6, K7, K11, K16, S5, B8)
K7, B8	Articulates how they evaluated the project and its outcomes with supporting evidence of how that was done (e.g. the appendix shows use of evaluation tools) - against the criteria laid out by the stakeholders and to make improvement for next time (K7, B8)
B8, B9	When questioned is clear on the detail of their project and the reasons for the decisions/actions they took in relation to the solution delivered and can articulate their links to business requirements. (B8, B9)
B5	Can provide examples from the project that demonstrates them as a sound L&D expert within their team/organisation (B5)

Grading Descriptors - Distinction Level

KSB	Grading Descriptor
K7, K11, K16, S13, B8, B9	Provides evidence that the project's outcomes result in a real and measurable business benefit/s or improvement/s, for example provides evidence of this through improvement metrics, early indicators of ROI, feedback from stakeholders/learners. Following implementation recommends future actions to ensure sustainable change (K7, K11, K16, S13, B8, B9)
K1	Evidence of adaptation of models/theories or paradigms to better support the specific project. (K1)
S9, S15, B5	During the project and the consultancy activities undertaken, show that they have been able to actively influence up, down and across the organisation, in particular that they have actively influenced senior teams to action the project or support implementation of their solution. Refers to the causes of common problems with client-consultant relationships and ways of avoiding and addressing them (S9, S15, B5)
K1, K8, S15	Can demonstrate that their research and understanding goes further - for example they may have compared and contrasted different organisations with different learning cultures / contexts and/or that they have applied thinking beyond the organisation today, which may include consultation outside of the business. (K1, K8, S15)
K15, S12, S13, B2, B8	Demonstrated the project shows consideration of innovative and creative solutions to the problem based on a reasoned review of what fitted the requirements and budget best, which may include demonstrable cost savings. (K15, S12, S13, B2, B8)
S9, S15, B9	Demonstrates that information is shared and productive, and shows that they have built mutually supportive working relationships established with colleagues inside and outside the L&D function (as appropriate to the project), to support achievement of business goals / benefits (S9, S15, B9)
B7	Used examples that demonstrate an understanding and insight during the discussion that goes beyond their role, proactively discusses and demonstrates a wider understanding of the challenges and issues facing organisations in the sector/business and how those impact on their work (B7)

EPA 2: Presentation and Q&A on learning journal

The following KSBs and Grading Descriptors are assessed in the presentation and Q&A.

KSBs

Code	KSB
K2	Legislation and policies that influence learning design and delivery
K3	The merits of different learning delivery channels to select an appropriate face-to-face, blended or digital solution
K4	The latest learning practice, trends and emerging thinking. Current research and appropriate application of best practice/best fit solutions.
K12	The L&D structure required to meet business needs, and whether this should be inhouse, outsourced and how to source specialist expertise when required
K13	The various L&D roles, responsibilities and skills required to design and deliver face-to-face, blended or digital solutions as appropriate to their role
K14	The policies and processes required for effective organisation learning,
K18	How to shape internal information systems and how they play a role to support learning
K19	How technology can support learning, including understanding of digital platforms /delivery channels as relevant to the role
K20	Emerging technologies that can support effective learning
S4	Develop an Organisational Development / L&D / succession plan that addresses gaps and fulfils skills, resourcing, talent, and future leadership needs in the partner / business area, accounting for changing internal and external environment, business and learner needs. This may include an organisation's sustainability strategy or exposure to the UK Government's policy for net carbon zero emissions by 2050, for example, ensuring a just transition for those with legacy skills into the new green economy.

S6	Foster and develop an embedded culture of learning and continuous improvement (e.g. through using communication campaigns)
S7	Manage learning and knowledge transfer
S8	Facilitate collective and social learning using innovative technological solutions
S10	Set up and manage Action Learning sets, coaching and mentoring programmes
S11	Ensure quality of learning and training delivery through providing feedback to colleagues to ensure continuous improvement of self and others
S14	Effectively engage, negotiate and manage third party suppliers
S16	Communicate confidently with people at all levels, including senior management
S17	Work with senior leaders to carry out succession planning, organisational development and talent pipeline plans. This may include an organisation's sustainability strategy or exposure to the UK Government's policy for net carbon zero emissions by 2050, for example, ensuring a just transition for those with legacy skills into the new green economy.
S18	Build rapport and demonstrate the use of language patterns to facilitate and encourage discussions, debate, learning and decisions
S20	Effectively manage challenging learner and group behaviours
B1	Pro-actively seeking opportunities and feedback to develop their business acumen, improve their performance and overall capability
B3	A desire to understand and experiment with new ideas and techniques, identifying areas for self and wider development/ improvements.
B4	That they act as a role model for learning within their organisation and across their networks
B6	They can enable different departments or groups to effectively work together above their own agendas and priorities

B10	Personal resilience to manage competing priorities, ensuring that they deliver the outcomes of their work through co-design and a full understanding of the impact they have on others
B11	The courage to hold a mirror up to the organisation when diagnosing solutions
B12	Skilfully navigating through organisational and personal politics
B13	Responsiveness and flexibility to changing internal and external environments and business needs
B14	Being a role model for the L&D profession, inspiring and galvanising others around learning solutions, ensuring that learning is embedded and delivers ambitious goals, outcomes and timelines

Grading Descriptors - Pass Level

KSB	Grading Descriptor
	The presentation is delivered to a 25 minute timeframe.
S16, S18	The presentation is delivered using appropriate media, which allows clear delivery of the presentation's points. The apprentice shows competence in their delivery style - for example the key points from the presentation are understood and have links to KSBs (S16, S18).
S16	Professional communication skills are demonstrated during the presentation and Q & A session. (S16)
K4, K19, K20, S8, B3. K2, K3, K12, K18, S4, S6, S10, S17, S18, B1, B10, K13, K14, S7, S14, S16, S17, S20, B4, B6, B11, B12, B13, B14	<p>The presentation is structured around providing competency based examples from the Learning journal that best demonstrate how they have reflected on and developed their own practice in each of the key themes:</p> <ul style="list-style-type: none"> • New and emerging trends and developments in the L&D sector (their example might look at K4, K19, K20, S8, B3) • Specialist L&D (their example might look at K2, K3, K12, K18, S4, S6, S10, S17, S18, B1, B10) • Leadership (their example might look at K13, K14, S7, S14, S16, S17, S20, B4, B6, B11, B12, B13, B14)
S16, S20	During questioning can describe the range of their work and the reasons for the actions evidenced in the Learning Journal when tested (S16, S20).
K4, B3	Can show an understanding of latest learning practices/trends/emerging thinking, for example providing examples of where they have researched and reflected on these in their Learning Journal (K4, B3).
K2	Can articulate an understanding of legislation and policies appropriate to their role/organisation and state why these influence learning design/delivery (K2)
K3	Shows they understand the merits of different learning channels, by providing reason/s for selection of learning channel/s from their learning journal (K3)
K12, K13, K14	Can articulate the key components for a successful L&D function and provide at least one example from their Learning Journal to show how these have supported learning in their workplace (K12, K13, K14).
S6, S7, S8, S10, S11	Can describe what is needed in an organisation to foster a Learning Culture, providing at least one activity they have undertaken/developed in order to develop/enhance the learning culture in their organisation (S6, S7, S8, S10, S11)

S18, S20	Can provide at least one example to demonstrate where they have effectively used their facilitation skills to deliver an learning outcome or demonstrate how they have developed these skills (S18, S20)
B10, B12, B13	Can provide examples of how they have responded in a flexible way to challenging or changing work environment, demonstrating how this response was effective. (B10, B12, B13)
S16, S17, S18, B6, B12	Can articulate at least one example from their Learning Journal that demonstrates their relationship management skills and how these have enabled learning outcomes and/or work objectives (S16, S17, S18, B6, B12)
B4, B14, K18, K19, K20	Demonstrates where they acted as a role model for learning culture and the L&D profession (B4, B14) Can articulate how Management Information and technology can support learning, providing at least one example from their learning journal to support this (K18, K19, K20)
S4, S16, S17, B6, B11, B12	Can demonstrate their ability to develop organisational plans by providing at least one examples of where they have developed these in conjunction with leaders and other departments as required (S4, S16, S17, B6, B11, B12)
S11, B1, B3	Can articulate when questioned at least one example of where reflection has supported improvements to their work and continuous development and can provide at least on example of how they actively sought feedback to improve their own performance (S11, B1, B3).
S11, B3	Can articulate why feedback is important to quality learning and delivery, illustrating with reference to an example from their Learning Journal where they have done this to support continuous improvement/s (S11, B3)
S15, S16, B11, B12, B13	Can articulate their ability to use their communication and interpersonal skills to support the achievement of outcomes and objectives in difficult or changing circumstances, providing an example to illustrate this from their Learning Journal (S15, S16, B11, B12, B13).

Grading Descriptors - Distinction Level

KSBs	Grading Descriptor
S16	The delivery of the presentation uses more than one relevant media to best get across the presentation's points, the examples they use in their presentation are easy to understand and are explicitly linked to the KSB/s they want to demonstrate (S16)
B4, B14	Provided evidence that their reflective activities show a real focus on improving their leadership skills within the team and for establishing themselves as an expert and/or role model for L&D practices (B4, B14)
S20	Demonstrated that they respond well to challenges during the Q&A, for example they are able to give critically reasoned responses even when challenged (S20)
B1, B3	Can provide examples of where their reflective activity, facilitation and/or ideas have created positive change or impact for team/organisation/project (B1, B3)
K4, B3	Can demonstrate an example of where they have used their research and understanding of new and emerging trends/practice/thinking to suggest or develop new ideas for practices within their organisation. For example, using knowledge of psychology and neuroscience (K4, B3)
B6,B10,B12,B14	Articulates deep insights into own style and impact and gives an example of how they have used this to read, influence and build relationships with a variety of people including senior managers working within and around politics and formal processes (B6,B10,B12,B14)
B1, B3, B4, B14	Can provide an example of how they have connected with peers across the L&D/HR professional community and benchmarked against organisations to bring best practice ideas and innovations back to benefit own organisation and acted as an ambassador/role model in this community themselves (B1, B3, B4, B14)

