epaplus

End-Point Assessment

General guidance for employers, independent training providers and apprentices

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Contents

Introduction & background information

The apprenticeship standards

The Apprenticeship Reform Programme (2017) puts technical and vocational education on a par with academic study, and allows apprentices to *earn and learn* at the same time. Employers, in groups of 'Trailbazers', identified what should be included in the apprenticeship standards, to ensure that the knowledge, skills and behaviours (KSBs) apprentices develop and become competent in are fit for the industry they work in. Apprentices spend the majority of their time gaining skills and knowledge in their workplaces; being supported by independent training providers (ITPs), with learning being underpinned and reinforced by apprentices spending a minimum of 20% of their time completing 'off the job' training activities.

The assessment methods for the new apprenticeships have also been identified and developed by the Trailblazers; and whilst some apprentices will complete formal qualifications as part of their programme, some will not. Standards are assessed using methods identified by the relevant Trailblazer group, using differing approaches, relevant to their subject area and apprenticeship level. An overall summary of the learning gained on an apprenticeship programme takes place at the end of the learning; completing a process known as 'End-Point Assessment' (EPA). The Trailblazer groups set the EPA methods used for each standard.

Apprentices will carry out EPA activities such as:

- being observed carrying out tasks
- scenario-based and multi-choice tests
- taking part in professional discussions
- taking part in structured / semi-structured interviews
- giving presentations and answering questions
- carrying out work-based projects
- collecting evidence of competencies for a portfolio
- writing reflective journals and statements
- continuous professional development
- role simulation activities
- reviewing case studies.

Employers will make the decision regarding apprentices' readiness to undertake EPA, after discussion with the relevant ITP and apprentice themselves.

EPA is managed by awarding bodies – they appoint industry competent assessors, who have had no input at all in the apprentice's learning. The EPA assessor must be independent of the teaching and learning the apprentice has completed, and they make the final decision in relation to the success and grade awarded for the apprentice.

Apprentices need to be fully prepared for their EPA

Awarding bodies will employ and appoint Independent End-Point Assessors (IEPAs) to carry out the EPA activities. These assessors will be subject specialists in their field, and will have not been involved in the apprentice's programme of learning at all. The IEPAs will manage all aspects of the EPA, and will make final grading decisions. They will assess all evidence against the relevant standard and decide on the apprentice's final grade.

The intention of this document is to support the process of preparing apprentices for EPA, with an overview of the different EPA methods and to provide guidance for each method.

Preparing for EPA

Once an apprentice has completed any required qualifications, and they are deemed to have gained all the required KSBs, they can enter 'Gateway' and plan their EPA activities. This can feel daunting; even overwhelming. The thought of having an 'end exam' can really pile on the pressure, so being as prepared as possible will help to alleviate this.

The timing of EPA activities should be carefully considered; if 12 weeks are allowed to complete all EPA activities, it might be useful to avoid busy times such as over the Christmas / New Year period and summer holidays.

For some EPA methods, employers and ITPs may be expected to be part of a panel. It is therefore very important that everyone involved in EPA should be notified and aware of the expectations as early in the process as possible. If a portfolio or other evidence is to be reviewed to inform further EPA activity, then time to do this must be factored in.

General points

Apprentices should talk to their IEPA, employer and ITP before EPA, and raise any concerns they may have with them. These people are there to support the apprentice through the programme and assessment activities, and can provide valuable resources and guidance.

Asking questions – everyone involved should feel confident in what they are doing, so should clarify anything they are unsure of before EPA. Get the times, dates and locations right: double check that everyone has the correct information for the assessments. EPA is a busy time, and it's easy to get things mixed up. Some assessments may require people to be off-site, so it's important to make sure everyone is going to be in the right place at the right time.

Everyone should **find out about anything 'different' to the normal routine** – if the EPA is carried out remotely, it might mean that people need to use technology that they haven't before, for example using a digital platform. Before EPA takes place, everyone involved should try out any new technology beforehand; to familiarise themselves with the programmes etc and ensure everything works on their computers. It might also be wise to check access to the internet if required; especially if it is based on a reliable WiFi connection.

Lingo / jargon: each sector, industry and organisation has its own 'jargon' that they use when staff communicate with each other. Before the assessment begins, make sure that everyone has the same understanding of any specialist terms and jargon that might be used.

Find out **what is allowed to be used during EPA**, for example is it an 'open book' test; are apprentices allowed notes / access to other resources during the EPA activity? If the EPA method relates to a portfolio / collection of evidence, how will / could this be used by everyone involved? For practical assessments, what resources / equipment will be provided, and by who? Apprentices may need to take resources to their EPA activities, so planning this in advance will help to lower stress levels.

During an Interview or Professional Discussion, the questions set and focus will be very **industry-related** and **based on the criteria from the relevant standard**. Questions will be asked to fill in any gaps and check the depth of knowledge and understanding. Apprentices should base their answers and discussion points on examples from their work practice / own experiences.

What are the **invigilation requirements**, if applicable? What are the expectations and conditions of the EPA provider? Everyone should be aware of what is going to happen and any specific requirements, for example a quiet area, to ensure quality assurance processes are followed, so the apprentice is not disadvantaged. Disruptions should be kept to a minimum, and if needed, a sign should be visible somewhere advising everyone that an end-point assessment activity is taking place.

It is important to carry out regular checks of apprentice progress against their EPA activities; it is advisable to use the relevant standard and criteria to frequently assess the development of the apprentice's KSBs. Apprentices should ask relevant people (e.g. colleagues, managers, ITP etc) to provide feedback to inform their development priorities. If grading descriptors are applicable and available, it is also advisable to use these to plan learning and improvement activities.

Templates are provided for recording witness / employer testimonies, observations and reflective journals. It is good practice for everyone to familiarise themselves with these templates, and use them throughout the apprenticeship programme. There are also completed examples of the templates for guidance.

Apprentices and EPA

Apprentices should know their own strengths and areas for improvement, and how 'far away' they are from being ready for EPA. It is vital that ongoing assessment of progress takes place, and that evaluating progress in relation to the required KSBs assessment is not left until the end of a programme of learning. It is therefore recommended that apprentices should get **actively involved** in assessment of their progress whilst on-programme, and try to take the lead on planning ongoing assessment activities and preparing themselves for EPA.

ITPs and employers have a vital role to play in preparing apprentices for EPA. As the formal, summative assessment activity takes place at the end of the programme, it would be easy to forget to carry out **ongoing, formative assessment activities** during the programme. **These are still extremely important** – don't forget to check ongoing progress at regular intervals, to ensure the apprentice is ready for their EPA when it takes place.

EPA methods

1. Observation

What is it?

An Observation involves an IEPA observing an apprentice undertaking a task or series of tasks in the workplace, as part of their normal activities; these are 'on-the-job' / naturally occurring duties, and will be linked directly to the appropriate standard and criteria. The Observation will normally be complemented by questioning from the IEPA, during and / or after the Observation.

Observational assessment is deemed the most appropriate assessment method for practical skills; by watching the apprentice complete a task, they can demonstrate their occupational competence.

This assessment method is suitable for assessing KSBs holistically, and specifically assessing practical skills. However, some workplaces may not be suitable for observation to be undertaken in, or may require additional controls to be put in place; for example related to safety, security, confidentiality or restricted access to the site / observation area.

For EPA, the Observation is a **summative** assessment method, taking place at the end of the apprenticeship to demonstrate the KSBs gained whilst on-programme.

It should be very clear **what** is being observed – the specific KSBs from the apprenticeship standard. The apprentice and IEPA should be very clear about what the purpose of the observation is, and know exactly which competencies are being shown / expected and assessed during the Observation.

How to prepare for an Observation?

Being observed can be daunting, and although this method of assessing competencies is widely used, the most experienced professionals can still become nervous and stressed about the prospect of being 'watched'. This must be taken into consideration when preparing for an Observation, and apprentices at all levels should be supported, to help them to feel prepared and ready for the assessment activity.

To help them to prepare, apprentices should **practise** being observed, both formally and informally, throughout their work and programme of learning. This type of activity is known as **formative** assessment – to allow the apprentice to receive ongoing feedback on their KSB development, in relation to the end-point assessment activity they are preparing for. Observations can be carried out by the apprentice's manager, off-the-job trainer or their more experienced colleagues / work mates; a range of people and situations will help develop the confidence and readiness of the apprentice. This should help them to:

- practise showing and demonstrating their KSBs
- build their confidence in being 'watched' and observed carrying out their normal activities
- become *reflective* professionals and carry out self-assessments of their progress
- be more aware of their development areas and priorities for improvement.

Another tip would be for apprentices to observe each other, as supportive observations of peers also helps to make the process less daunting. There are also benefits of experiencing the process from a different perspective; 'becoming' the observer helps the apprentice to be more evaluative of their own practice and helps to promote objectivity. It is important to carry out observations with a focus, for example using the appropriate standard and / or setting specific goals or a focus for the observation. Also, if observations are carried out throughout the programme, apprentices will be able to make comparisons in relation to previous practice and competencies, and have something to base their development priorities on, in preparation for EPA.

Other factors to consider

The experience, knowledge, qualifications and occupational competence of the observer must be taken into consideration, to ensure that the findings from 'practice' observations are valid and the results are reliable. An observer must be realistic and honest when observing apprentices and providing feedback to them, and any practice

observations should focus on highlighting areas of good practice whilst being constructive about any areas for further improvement.

It might also be useful to reflect on what progress has been made since any previous observations; to treat observations as a tool to record **progress over time**. Try not to treat each observation in isolation – the observer might not have completed prior observations, but the findings / feedback from them should be used to review how well the apprentice is developing and improving their KSBs. Asking apprentices to reflect on previous assessment and observation activities will help to involve them to be more aware of their strengths and weaknesses, and will also make the apprentice more responsible for their performance. It would also be beneficial to structure any development priorities in an informed way; for example by linking them to the EPA criteria, allowing the apprentice to 'tick off' their competencies and develop their self-confidence.

For the purposes of EPA, observations **should not** have any elements of simulation. If there are any KSBs which don't naturally occur in the observation, the IEPA will revisit them afterwards / at another time; this is why the Observation is often followed up by a question and answer / discussion activity. The IEPA will explore the apprentice's KSBs and fill in any 'gaps' by asking specific criteria-related questions after the Observation.

Observation conditions

As this is a formal EPA method, and although it will probably take place in a real working environment, the apprentice and observer should remember the formality of the activity at all times. Other people may enter and leave the observation area as a matter of course, but they should try to limit any interruptions and should not offer any advice and / or guidance to the apprentice during the Observation. Although the apprentice needs to demonstrate the KSBs, they should always, where appropriate, seek support and guidance from colleagues. This is a natural and good practice part of work, and apprentices should also review where this would be considered good practice, such as when seeking a second opinion.

Observation feedback

After practise / formative observations, apprentices should receive detailed, clear and constructive feedback on their performance and progress. The way in which feedback is delivered is also important, especially if the intention is for the activity to be supportive and developmental. Everyone is different, and each individual apprentice will have their own personal preferences in relation to how they prefer to receive their feedback. Feedback meetings; their content and style in particular, should be structured in a way that suits the individual receiving the feedback.

For EPA, an Observation Record will be completed at the time the Observation is taking place. The IEPA will mark the Observation against the standards, and identify which areas have been achieved.

How to provide constructive and useful feedback?

There are many ways in which feedback can be structured, delivered and presented. It is important to adapt feedback methods to meet the needs of the apprentice – and to make it a two-way rather than one-way process. Apprentices need to 'own' their own progress and development priorities, and if they are only 'told' what they are doing well and what they need to improve, then their 'buy in' may not be assured. We should therefore always consider how observers could use a **coaching** approach to engage apprentices in reviewing competencies (see Appendix I)

Appendix I identifies some feedback models which could be used and adapted to meet the needs of the apprentice and situation, but there is no right or wrong way to structure this; it should be dictated by the context and preferences of the people involved.

General points

Remember that the most effective feedback **is not one-way**; if someone is to learn and develop, they should be ***actively involved*** in the process of identifying their own competencies and priorities for improvement/further development.

Becoming **reflective** is important for any professional to improve and develop; for ongoing observations, structure the feedback to promote self-reflection and help the apprentice to learn and make their own decisions about what they do well and what they need to progress and advance their KSBs.

Guidance for the professionals involved in the Observation process.

The apprentice should:	
try to…	**try not to…**
fully prepare for the Observation – try to anticipate what might go wrong, and identify strategies to overcome / mitigate them.	panic! Observation of people at work is a normal thing – and it's pretty likely that your observer will know what you're thinking as they've 'been there' themselves.
think about what you might struggle with/to do in advance, and ask for support / guidance from your colleagues / manager before the Observation.	be observed before you're ready, but remember to take the advice of the more experienced people you work with. If they think you're ready, you probably are.
practise what you're going to be doing in the Observation, before it takes.	be over-confident. Even the most experienced professionals don't get everything right all the time, so be aware that you'll have some development points, wherever you 'are' in your career.
carry out peer observations – this other perspective will help you to see what the observer sees, be more aware of your own KSBs and plan.	

The employer should:	
try to…	**try not to…**
plan opportunities for the apprentice to practise being observed and receiving feedback – the EPA activity shouldn't be the first time they are assessed in this way.	tell the apprentice exactly what they are 'doing wrong' and how to put it right! If people are 'told' what to do, they don't always 'learn' it.
encourage the apprentice to take responsibility for identifying what they need to improve and how they will improve.	be too 'hard' or 'soft'; remember to stay objective and use the appropriate standard to make observation judgements.
apply a coaching approach – apprentices will be more empowered and motivated if they identify what they need to do, in order to develop their knowledge, skills and behaviours and improve.	overload the apprentice with feedback – too many points for improvement can be overwhelming and confusing, so prioritise the most important factor/s for improvement, rather than having too many.
stay as objective as possible, and avoid making any "if it was me, I would do it like this…" statements.	compare staff members; use examples of good practice to help make suggestions, but remain objective and don't compare the apprentice to their colleagues.

The observer should:	
try to…	**try not to…**
be very specific and use examples from the Observation to explain important points.	be vague, not citing/ using examples or talk 'abstractly'.
keep the feedback short and focussed, but not too rushed.	take too long in providing the feedback – the longer after the event, the less useful it is for the receiver.
have a balance of negative and positive feedback – if there are a large number of development points, prioritise the most important ones.	do all the talking – make the feedback a two-way conversation rather than the observer simply 'telling' the apprentice how they did.
make sure you're fully prepared to provide the feedback – the observer should take notes during the observation which should be used to inform the feedback.	focus too much on negative / development points – too many areas for improvement can demoralise and demotivate the person receving them.
	make comparisons to other Observations / members of staff .

2. Practical assessment

What is it?

A practical assessment involves an IEPA observing an apprentice undertaking a set task or a series of set tasks in a **simulated** environment; for example, at an ITP or specialist centre. It allows the apprentice to demonstrate their procedural knowledge and skills of 'how to do something'. This can be complemented by questioning from the IEPA during or after the assessment activity.

This assessment method is suitable for collecting first-hand evidence of the apprentice's KSBs and testing them, holistically and objectively.

How to prepare for a practical assessment ?

This is a little less daunting than an Observation, but many of the strategies mentioned in preparing for an Observation also apply to preparing for a practical assessment. Apprentices should practise the practical tasks in advance of the assessment, to help them to feel fully prepared and confident in their ability to demonstrate them at the point of EPA.

The assessment area should be fully prepared in advance; any materials / resources and equipment should be ready and available, and any people involved should be very clear about what their role in the assessment activity is / will be. The criteria being assessed should be clearly identified for the apprentice in advance of the activity, to allow them to prepare accordingly.

As per the suggestion of carrying out peer 'observations', practical assessments could also be peer-assessed to support apprentices to prepare for this EPA method. This should be carried out in a structured way, for example by using the criteria from the appropriate standard. This process is also most beneficial if previous feedback and findings are used to evaluate progress being made, and helps the apprentice to plan, and provides a focus for their development priorities.

Practical assessment feedback

As for the practice / formative Observation feedback, the apprentice should receive ongoing clear and specific comments on their competencies and areas for development.

How this EPA method differs from an Observation might be useful to consider and explore. This method requires a practical activity to be set up, and the apprentice is required to complete a defined set of work-related tasks / activities. The IEPA will be 'looking' for a pre-defined set of performance criteria, and will use a pro-forma. It could be that a Pprofessional Discussion or questioning activity follows this EPA method; this would be to assess the underpinning skills and knowledge that directly relate to it. EPA feedback is therefore directly linked to the relevant performance criteria.

If the activity was part of an ongoing practise / development activity, then the feedback should try to model the EPA feeback structure to help the apprentice become more aware of their competencies and areas for improvement.

3. Tests

What are they?

This method includes a variety of tests that are predominately used to assess knowledge. The different types of EPA tests are:

- Multiple Choice Questions (MCQ), Knowledge Tests (KT) or Situational Judgement Tests (SJT)
- Short Answers (SAQ) or
- Written Responses.

A **multiple-choice** test consists of a series of questions in which apprentices are asked to select the correct answer from 4 options. Individual questions or groups of questions may include case studies, scenarios, and sections of text, graphs or diagrams, on which the questions are based.

A **short answer** or **written** test consists of a series of questions which apprentices are required to answer. These could consist of one type, or a variety of types of question, such as open questions and scenario-based questions. Short or long answer responses allow the apprentice to demonstrate the extent and depth of their knowledge and skills.

Many apprentice standards include tests in their EPA activity. The type of skill being assessed will inform the test type / construction; e.g. a multiple choice test would not allow an apprentice to show a great depth of knowledge and understanding in relation to evaluation or analysis, as a more detailed answer would be required. If the answer was directly related to a policy, procedure or Act, a multiple choice question would probably suffice. This is taken into consideration when assessment development and production takes place.

Tests assess knowledge; there are some limitations related to what skills and behaviours they can assess. Apprentices can expect to have their occupational knowledge assessed using this method, whereas their skills and behaviours will probably use more practical-based and discussion assessment methods.

How to prepare for a test?

NCFE produce sample test questions and papers, to allow apprentices to prepare for EPA. All test content is based on the criteria set in the appropriate standard, so these should be reviewed by the apprentice to help inform their test preparation. The content and subject of the test questions will be based on the relevant apprenticeship standard and criteria, so using them as the basis of revision and preparation activities would be very appropriate and beneficial.

Sample mark schemes are also produced and made available, and the apprentice specification and guidance will clearly state what the Pass, Merit and Distinction grades are, as appropriate – as not all tests have the higher grades.

‘Test conditions’ can also increase fear and anxiety levels for apprentices. Using the sample papers and questions to help practise, especially under ‘test conditions’ – i.e. in a set time frame and in a quiet room, would be useful in preparing for this EPA method.

Apprentices should also refer to the provided glossaries – they will identify the important terms and language used in their work area, and explain their meaning and use in context. Using these in revision activities will help, as the terms will be used and referred to in EPA questions.

Multiple Choice Questions (MCQs), **Knowledge Tests** (KTs) and **Situational Judgement Tests** (SJTs) have a set number of questions, and for each, the respondent is asked to select the one correct answer from a choice of 4 possible answers.

Short answer questions (SAQs) do not have options to choose from – they expect the apprentice to draw from existing knowledge to respond to a question based on a given scenario / context. There will also be guidance related to how many words will be expected, normally a maximum number, for example a maximum of 250. For this EPA method, it is vital for the apprentice to look carefully at each question to identify the **key words**. Different levels of apprenticeship will have differing levels and types of questions. We wouldn't expect a Level 2 apprenticeship to have the same types of questions as a Level 5 apprenticeship. The level of the question will be guided by the **command verb** in it; examples of the type of **key words** used in questions at differing levels include:

- level 2 – **describe, explain, state, define**
- level 3 – **compare, examine, identify**
- level 4 / 5 – **analyse, justify, evaluate, recommend**.

It is therefore important to take notice of the key words to identify exactly what the question is asking the apprentice to do. For example, the answer required to 'describe' something will be very different to when asked to 'analyse' something.

SAQs are normally based on a scenario, and require the apprentice to consider their answer in more depth than for a MCQ. They will need to draw from the knowledge and skills gained during their time on-programme to answer it.

There will also be guidance regarding how many words to write for SAQs. This is normally given as a maximum number – so practising writing answers to questions in full sentences and coherent paragraphs is also recommended. This is where literacy skills are important.

Sometimes, just getting started with an SAQ is the hardest part. Tips for this include:

- making brief notes about thoughts on the question topic / scenario
- producing a quick 'mind-map' of ideas related to the question topic / scenario
- splitting ideas into positive / negative - to start evaluating them
- using some of the wording from the question to structure the answer (see example on page 13)
- practise answering example questions – and turning notes into full sentences and paragraphs
- working with ITPs to predict what the SAQs might ask, and exploring and practising how to produce effective written answers to questions.

To help prepare for both MCQs/SJTs and SAQs, completing practise tests, answering example questions and exploring the answers with others would be beneficial.

It must be remembered that question content will be taken from across the apprenticeship standard – it is therefore very important to ensure that that apprentices have knowledge and understanding of the **whole standard** – so that there are no surprises when they complete the EPA test. A review of current knowledge in relation to the full apprenticeship standard is recommended – in case there are any areas which don't naturally occur in the apprentice's workplace.

Some standards contain a number of pathways, so test questions could be from areas less known / used in some workplaces. Some criteria might not be relevant to some workplaces, but the apprenticeship is for the industry– and not only the apprentice's current employer / company. It is therefore recommended that apprentices make themselves aware of the full coverage of their standard, and ask their ITP / employer for guidance / information if there are any areas they are unfamiliar about or unsure of.

Tip - become the question writer!

Apprentices could also look at the criteria for their own standard to predict what the question might be / look like. A top tip would be to use the criteria to write a question – this will help them to prepare for EPA. Employers, ITPs and colleagues could look at a specific criteria and explore how a question might be structured. An example of this is shown in the table below.

Apprenticeship:	Adult Care Worker (Level 2)
Criteria:	**C. The importance of communication** 13. The importance of active listening
Sample question:	'Anne', a service user, is upset about a family argument she has had recently. Which of the following demonstrates active listening from the care worker talking to her about it? **A.** checking what is happening in the corridor while Anne is talking. **B.** looking at some case notes while Anne is talking. **C.** maintaining eye contact and nodding while Anne is talking. **D.** writing in a notebook while Anne is talking.
Possible other questions / topics they could be asked about	**For topic**: discussion about what active listening is, e.g. repeating / paraphrasing, not interrupting / talking over someone, defining terms and asking for clarity on specifics, listening 'between the lines', smiling and nodding, having a positive posture (not folding arms, looking bored / elsewhere), mirroring the body language of the speaker, ignoring distractions, asking questions for more detail, showing empathy and summarising what has been said. **Possible other questions/points for discussion** • What impact on the working relationship with a service user could poor active listening have? • How does active listening promote effective working relationships? • Why is active listening important when working in adult care? • A service user is angry at a letter they have recently received. How could active listening skills be used to help them calmly formulate a response to it? • What experience do they have in relation to the importance of communication and how they have used active listening techniques?

Marks and timings

It is important for the apprentice to manage their time effectively when completing this EPA activity.

- If 60 minutes are allowed for a MCQ and there are 40 questions, then that would allow for 90 seconds per question.

- If 60 minutes are allowed for test completion, and there are 40 MCQs and 4 SAQs, if 1 minute per MCQ was used then the apprentice would have 20 minutes left for the SAQ – resulting in 5 minutes per question. This does not allow for a great deal of time to write up to 250 words for each SAQ!

- If 90 minutes are allowed, the 40 MCQs could be completed in 40-50 minutes, leaving at least another 40 for the SAQs.

This type of approach to tests can be very useful – breaking the test times up so we have some structure to the best use of time during the tests. However, every individual will need differing times for each type of question. Practise is therefore key here – it improves our awareness of development needs in relation to completing tests, reduces the fear and improves self-confidence. It is therefore important to practise completing tests under timed conditions. This will help the apprentice to get a sense of how fast they work and how to best manage their time during tests, in order to gain maximum possible marks.

In the SAQ example below, the important and useful words are highlighted and used in the example answer. This shows how the question can be used to structure the answer, but also ensure coverage of all the important points. The word **evaluate** is very important – the answer needs to identify the risks and benefits, but also review and assess the impact they may have: this is where **evaluation** comes in. Apprentices could draw from their own experiences but could also make informed judgements to help them to evaluate the question in sufficient detail. Practising this is important – and an exploration of the difference between identifying / describing and evaluating / reviewing would probably be useful.

Apprenticeship:	**Assistant Practitioner Health (Level 5)**
Criteria:	**Knowledge: research and development in the health and social care sector to inform and improve quality of care**
Sample SAQ:	Your team is hosting **clinical trials** on medication for individuals who have suffered from a **stroke**. **Evaluate** the **benefits and risks** to a **stroke patient** in **taking part in a clinical trial** and **draw a conclusion.** (5 marks)
Possible answer:	Engaging patients in **clinical trials** is an important role of a health practitioner. The results of such trials are used to inform improvements in the quality of care and treatment of conditions. There are, however, **benefits and risks** involved in **taking part in clinical trials.** The advantages for the patients include gaining access to treatment which is not readily available to everyone, being more closely monitored and supervised by medical practitioners and the opportunity to play a more active role in their own healthcare. The **potential risks** should not be overlooked. There may be unexpected side effects or risks not known or expected, more time will be spent attending appointments and the patient's stress levels could increase. Taking part in a trial will mean commitment from the patient; it could be very time consuming, and restrictions could be placed on them related to activities they can and cannot do, for example not eating certain foods and limitations on alcohol consumption. It should also be noted that the different / new approach may not 'work' for the patient. For a recovering **stroke patient**, there may be specific **benefits and risks** related to their recovery. As the most common psychological problems affecting people after a stroke are depression and anxiety, the increased levels of care participating in the trial would create could help to support these needs. The stimulation taking part in the trial would bring could promote cognitive development, however, it might also increase fatigue levels whilst in recovery. **To conclude,** there appears to be more benefits than risks in participating, and the opportunity to help other people with the condition would probably motivate and improve the sense of worth for the patient involved.
Possible other questions / topics they could be asked about	**For topic**: discussion about the general benefits and risks of participating in clinical trials, what experience they have had in their workplaces of patients being involved in trials and how the patients were engaged in them. Also, an exploration of how patients they have worked with benefitted from being involved, but also the cons. If limited experience, an evaluation of how different trials might impact on the physical and psychological wellbeing of patients might be affected. **Possible other questions / points for discussion**: Differing types of clinical trials, how the results are used to inform practice, the benefits and risks for other conditions and diseases, how trials are financed and made more engaging for patients.

Become the marker

All SAQs will include information regarding how many marks are awarded to the questions, and sample mark schemes explain how the marks are awarded. This is important detail to help apprentices prepare for this EPA method. As previously mentioned, time should be allocated to the questions that will give the best chance of gaining marks, with priority given to the questions which gain more marks and have a subject which the apprentice is more confident and competent in.

Using the mark scheme

It would also useful to explore the mark scheme for the sample questions. Once the 'possible answer' has been reviewed, apprentices could 'become the marker' and evaluate the answer using the mark scheme. Discussion around what marks would be awarded to this sample would support understanding of how to answer SAQs with confidence.

Using the mark scheme below, what marks would the 'possible answer' be awarded?

Question number	Mark scheme	Marks
44	**Sample question:** Your team is hosting clinical trials on medication for individuals who have suffered from a stroke. Evaluate the benefits and risks to a stroke patient in taking part in a clinical trial and draw a conclusion. **Information on how marks are to be awarded:** Award **2 marks** for explaining the benefits. Apprentices should cover 2 benefits in detail. Possible benefits could include: • access to new treatments before they are widely available • gain increased understanding and ownership of their treatment and condition • higher levels of involvement, monitoring and support from healthcare professionals • opportunity to help other people with the same condition. Award **2 marks** for explaining the risks. Apprentices should cover 2 risks in detail. Possible risks could include: • the new strategies and treatments being studied aren't always better than current standard care • new approach may have side effects or risks that doctors don't know about or expect, and then only discover when testing on patients. Award **1 mark** for drawing a conclusion.	**5**

It is also useful to know the grading for the tests. Different assessment plans have different gradings; some will have a Pass mark only, and some will have scores set for Pass, Merit and Distinction. Apprentices should know how their tests and scored and graded, so they can work towards the gaining the grade they aspire to.

For example:

Apprenticeship	Maximum marks	Pass mark	Merit mark	Distinction mark
Business Administrator (L3)	50	30 - 39	N/A	40+
Adult Care Worker (L2)	60	40 - 49	50 - 54	55+
Team Leader / Supervisor (L3)	30	15	N/A	N/A
Operations Dept. Manager (L5)	30	15	N/A	N/A

4. Professional discussion

What is it?

A Professional Discussion (PD) is a two-way discussion between the IEPA and an apprentice, to assess the apprentice's in-depth understanding of their work and industry knowledge. In this respect, it differs from an Interview, which tends to consist of an IEPA asking questions and the apprentice answering them, with less scope for interaction and discussion. Professional Discussions are not led by the IEPA, as they involve both the IEPA and the apprentice actively listening and participating in a formal conversation. This gives the apprentice the opportunity to make detailed and proactive contributions to confirm their knowledge and competencies - across the KSBs that are mapped to the EPA method.

Think of a PD as a conversation in a professional context, rather than a question and answer session.

This assessment method is used to:

- assess an in-depth understanding of a subject
- assess occupations/ tasks that cannot be directly observed in practice
- assess aspects of an occupation that are difficult to observe, are rare occurrences, or take place in restricted or confidential settings.

The PD will be used to provide a holistic approach to assessing knowledge and understanding, and will also test the validity and reliability of any other evidence submitted (e.g. a portfolio of evidence or reflective journal entries). As the PD normally links to evidence the apprentice submits before EPA, the focus and topics of the discussion will be identified in advance. There should be a clear purpose to the PD, with detail provided by the IEPA regarding what will be covered, the format it will take and areas / points to be included.

It is normal procedure to digitally record the PD, to allow for the IEPA to refer back to it before providing a judgement on the grade to be awarded, and to allow for standardisation and quality assurance activities to take place.

The IEPA will provide detail regarding the format that the PD will take, including if it will be based around scenarios. If scenarios are included, the IEPA will also provide guidance on the content of them. It will also be stated whether it will be used in conjunction with any other assessment component, or graded separately. Apprentices will be informed if they can use supporting information/evidence during the discussion - that can inform and guide what they say, for example, if the apprentice has prepared a portfolio of evidence during the on-programme part of the apprenticeship or if a project report is required.

For this EPA method, a PD is a planned, in-depth, two-way conversation between the IEPA and apprentice. It is an assessment method which allows the IEPA to confirm the authenticity of evidence, fill in any gaps in the apprentice's subject / product knowledge and can be a very useful holistic assessment method; drawing together evidence to confirm the apprentice's knowledge, skills and behaviours. IEPAs will ask probing questions, asking the apprentice to explain specific points in detail and draw from the experiences they have from working in the industry.

How to prepare for a PD

PDs take place at work on a regular basis; we probably just don't call them this!

In all industries, staff will have regular discussions with each other about work-related topics, issues and problems. Identifying when PDs take place at work will help an apprentice to understand when and why they happen, and how they are structured and managed by the participating staff.

As for other EPA methods, practise can be very beneficial for apprentices, so is recommended. Exploration of the requirements of a PD would also be useful, and a self-assessment of individual skills and competencies could be used to develop the areas in need of improvement.

The PD will probably take place on-line, e.g. via Zoom. It is recommended that the point of EPA is not the first time the apprentice experiences this, and that this activity is included in practising PDs.

Professional Discussion hints and tips.

try to:	try not to:
practise discussing work-related topics and subjects in a professional way.	use slang or inappropriate language in practise discussions, to help prepare for EPA.
look at the criteria assessed in the apprenticeship standard; familiarise yourself with the content and use it to inform practise discussion activities.	worry about taking part in discussions at work, about work-related topics. It's a normal activity, and although people may disagree, they can do this in a professional manner.
evaluate the language which is suitable for a PD.	panic about being recorded – in any practise discussions, record them to help you prepare for EPA.
relate experiences and discussions to the appropriate standard, and explore how coverage of them all can be ensured (in practise activities).	let the term 'professional' discussion put you off – it's to acknowledge the link to industry and how discussions at work differ to normal everyday informal discussions.
practise active listening – making eye contact, nodding, asking questions for clarification etc.	ask too many questions at once, or try to answer questions without checking you're confident you know exactly what is being asked.
explore how to remain focussed during a discussion – it's easy to get sidetracked or lose focus, so practise staying 'on track'.	forget about using support documentation and basing answers on – if a Portfolio has been submitted and is being used by the IEPA, the apprentice can refer to the document in the PD.
develop knowledge and understanding of specialist language and terminology.	worry about 'thinking time' – it's normal to need some thinking time before answering a question.
plan for PD activities – when the topics for EPA are identified, use them to plan possible discussion topics.	be put off by the formality of the EPA PD set-up. The IEPA may follow a set format and / or have an agenda – this is simply to ensure standard practice.

5. Interview

What is it?

An Interview consists of an IEPA asking the apprentice a series of questions, to assess their competence against the relevant KSBs. It is a structured dialogue between the apprentice, IEPA and in some cases, a small panel. It differs from a Professional Discussion in that the IEPA's role is restricted to asking set focussed questions, and there is no scope for two-way discussion. The IEPA leads this process; to obtain information from the apprentice and enable a structured assessment decision-making process. This assessment method is used to assess the knowledge and understanding of a subject, as well as the skills and behaviours within an occupation that may not naturally occur. In some apprenticeships, it is known as a 'Competency-based Interview' and focuses on a series of set competency-based questions, which have been designed to test application of of knowledge and learning, against the relevant standard. The Interview will most likely be recorded via video, audio or in writing by the IEPA.

Prior to the Interview, the apprentice will normally be asked to submit evidence of their work on-programme; this could be a portfolio, work-based project, CPD log or a series of witness testimonies and / or reflective journals. The IEPA will review this evidence prior to the Interview, and the questions they ask at EPA will refer to it.

If the Interview is carried out by a panel, apprentices will know in advance who will be on the panel. The panel will be led by the IEPA, and will typically be made up of representatives from the apprentice's programme of learning; for example their employer and / or someone from their ITP. Some apprentices may be nervous or anxious completing this assessment, which may impair their performance, so carefully preparing to take part in this activity is important.

How to prepare

Taking part in mock Interviews are a useful tool to prepare for this EPA method. Although it may be difficult to identify exactly what will be asked in advance of the EPA Interview, it is still useful to practice answering questions in a more formal setting; especially with a panel – if this is something new and / or unfamiliar. Interviews are an important activity in all work areas, so the skills and competencies gained by practising them are of benefit to all. Building self-confidence in an Interview situation would be valuable for all apprentices.

As the Interview is most likely to be based on some form of evidence, the apprentice should have a strong understanding of the contents of their submission, especially if any of the evidence contained in it is weaker in demonstrating KSBs. Any areas of competence (from the relevant standard) which have 'gaps' in them are more likely to be asked about in the Interview. A review of the evidence submitted, supported by the employer or ITP, will help the apprentice to prepare for the Interview.

Apprentices should:

- ensure they can talk confidently about the work they have submitted and presented prior to the Interview.
- be prepared to give other examples than those already presented, and be able to expand on the points made in their submission of evidence.
- for Competency-based Interviews, prepare two or three good examples of demonstrating competence from the workplace – drawing on their experiences.
- check which KSBs are being assessed at Interview, and look at any assessment plans / feedback they have had whilst on-programme. Review the documents submitted in advance of the Interview, and make notes related to what has been learned whilst on the apprenticeship programme
- review what language is appropriate for an Interview – this will include the use of specialised language and terminology, and checking that the terms used in their workplace will be understood by the IEPA
- ask questions of their manager, colleagues and / or ITP if there are any points related to the Interview they are unsure of
- consider any legislation / codes of conduct which have impacted on their work and practices, as well as any health and safety regulations and how they guide what workers in their industry do.
- identify and explore the type of questions they may be asked during the Interview.

6. Presentation and Questioning

What is it?

This EPA method involves an apprentice presenting to an IEPA (and possibly a panel) on a particular work-related topic, and this is followed by a question and answer (Q & A) session, led by the IEPA. If a panel is involved, it would be made up of the IEPA, an employer representative and a member of staff from the ITP the apprentice has completed their off-the-job training with.

This method will assess the apprentice's understanding of a work-related subject and / or task, and is also useful when knowledge and skills in an occupation cannot be directly observed in practice. It also allows apprentices to demonstrate skills within the standard directly, for example the ability to deliver a presentation, structure information and share it with others. It will also allow demonstration of the ability to respond to questions, and managing discussions could also be included.

For this EPA method, the questions will focus on allowing the apprentice to expand on the points they make in the presentation, and ensure that the standard is fully covered. Questioning on work-based practice reinforces the validity of the demonstrated KSBs and allows the apprentice to authenticate any further evidence they have produced – for example, if a Portfolio of work has been completed.

Other factors to consider

Some apprentices may find giving a Presentation makes them nervous or anxious, and this may impact on their performance. It is also useful to remember that apprentices will not be given credit for any KSBs which are not included in the occupational standard, for example their presentation skills or the ability to use high-tech resources during the Presentation.

There may be a set number of questions required for the Q & A section of this EPA method, and they are generally specific to the occupational standard and topic of the presentation. The content of the questions is normally made available to the apprentice in advance of the Q & A activity, and the apprentice will normally be able to make reference to any supporting documentation to help them answer the questions set.

How to prepare

Some work areas are more likely to expect employees to give and deliver presentations than others. In a business / managerial setting, work-based presentations are commonplace, but in more practical contexts, presentations are less likely to occur. As for other EPA activities, preparation is key. Thorough planning of the presentation would be good practice,

Apprentices should:

- practise giving presentations and talking to groups of people at work.
- consider making notes to support their Presentation – **but this should not be a script to read from.**
- find out if they can use supporting resources in the Presentation, for example PowerPoint / Prezi.
- try to anticipate the questions they may be asked related to their Presentation.
- show their passion and interest for the subject of the Presentation – enthusiasm is contagious.
- remember the importance of non-verbal body language - smiling and eye contact are important.
- expand on the points they make by making clear links to their work experience and providing examples.
- speak clearly enough for the audience to hear easily – and consider what type of language is appropriate for a work-based professional presentation.
- not rush through the Presentation - nervous speakers tend to talk very fast – be aware of this and slow down.
- not read from a PowerPoint too much – if used, the talker should remember that the audience will more than likely be able to read the slides – so don't simply read them out if they are used.
- put themselves in the audience's position – consider your Presentation from the other side and think about what you find engaging / interesting and important!

7. Project

What is it?

For this EPA method, the apprentice will carry out a project in their workplace by identifying an area of their work they would like to develop, improve or do differently, implement changes, reflect on the impact and review how the learning will inform future practice. Completion of the Project should improve the apprentice's awareness of their KSBs and allow them to evaluate the impact it has had on their work, organisation and colleagues. It should be something which will be of genuine benefit to the organisation / employer, agreed with them and could either be a stand-alone project or part of a larger organisational undertaking.

The findings of the Project will normally form part of other EPA activity. It might be assessed in its own right, or be part of other EPA methods, for example a Presentation, Interview, Question and Answer or Professional Discussion. The length of time the project must be completed in will be stated in the relevant apprenticeship information, and this is normally completed in the latter part of the apprenticeship. Completion of the Project should bring together elements of learning from different parts of the apprenticeship, and demonstrate accumulative knowledge and understanding from the relevant programme.

It would be useful for apprentices to include their employer in choosing the topic / project focus to ensure relevance and value. Apprentices should also seek support and guidance from their ITP whilst identifying and completing their Project, and review their progress on a regular basis.

It is important to ensure that:

- all work in the Project can be verified as the apprentice's own.
- regular reviews of Project progress take place – with the employer and ITP.
- the Project is viable, has value for or is of benefit to the employer and organisation, and is based on a business area / problem which is part of the apprentice's normal role.
- apprentices review which criteria is assessed by the Project and any other EPA methods, and use this detail to inform completion of their Project.
- the employer sets aside time for the apprentice to plan, undertake and write up their Project.
- the ITP and employer provide access to the tools and systems required for the apprentice to complete the tasks within the Project.

The Project should be completed in the apprentice's normal place of work. Good practice is to have an identified member of staff from the employer to oversee and manage the Project from the employer's perspective, and to also provide support for the apprentice - in relation to successfully completing the Project.

Projects do not always fully go to plan! There may also be obstacles / barriers to the success of the Project, which present themselves and were not anticipated. As this is normal in the 'real' world of work, then apprentices should prepare themselves for this happening. This is an important area for the employer and / or ITP to support and guide the apprentice through this. There may also be times when the apprentice does not have the authority or resources to overcome barriers, so working closely with colleagues, managers and ITP staff to identify suitable strategies is also important.

8. Portfolios and Logbooks

What are they?

A **Portfolio** is a collection of pieces of evidence, gathered together on-programme, that is used as the underpinning basis of an end-point assessment method.

A **Logbook** is a record of achievement created over the course of the on-programme element of the apprenticeship and can be used as the underpinning basis of another End-Point Assessment method (e.g. Professional Discussion, Interview, Question & Answer).

What can it be used for?

A Portfolio and a Logbook (or their equivalents) are collected pre-Gateway and are **not always used as an EPA assessment method in their own right**. They are, however, used to underpin an assessment method (such as an Interview or Professional Discussion). Apprentices may use their Portfolio / Logbook to support their responses to questions or during a Professional Discussion.

Guidance on the number of pieces of evidence will be provided for each apprenticeship, and the focus of all evidence collection should be **quality** and **not quantity**. Apprentices should carefully select the evidence they collect to present to their IEPA. All evidence should be clearly marked / annotated to show which specific criteria the evidence relates to, with the inclusion of a reference system / page summarising the Portfolio / Logbook contents. It is the responsibility of the apprentice to ensure that they include sufficient and reliable evidence, which can also be authenticated. Apprentices should refer to their EPA guidance prior to submitting their work / evidence at Gateway, and ensure that their submissions/evidence clearly meet the criteria being claimed.

Best practice in Portfolio presentation makes the most of every single piece of evidence, by including documents which meet multiple criteria. It is not necessary to have one piece of evidence for every criteria; apprentices should map their Portfolio contents to as many of the standard criteria as possible.

Example contents page / mapping document:

Evidence reference:	Evidence description:	Criteria references:
‘A1’	E-mails to and from customer	• resource management • communication and collaboration • professionalism • using IT systems • project quality
‘A2’	Witness testimony – employer statement	• professional boundaries and relationships • compliance – statutory standards and codes of practice • rights and behaviours – dignity • barriers to communication • hazardous substances • reducing the spread of infection • asking for help and working with others
‘A3’	Reflective journal	• record and document production • decision making • communication and quality • relevant regulation, processes and policies • professionalism, adaptability and responsibilities

Each standard will have templates that the apprenticeship should use to map their Portfolio / Logbook contents.

Be careful!

When collecting Portfolio evidence, you must ensure you are compliant with General Data Protection Regulations (GDPR, 2018). Do not submit evidence which has clients' or customers' information contained in it – even if you have their permission, you might breach the regulations once the Portfolio has left your possession. This doesn't mean you can't use documents with personal details included – you would need to anonymise them or redact the information, as can be seen in the examples below:

Redacted data

Capita'One
auto finance"
r{NoHassle auto fihanceI \
t
FINANCE BEFORE YOU SHOP FOR YOUR CAR!
o
[redacted]
--- - - - - .__Financing_in aclvance-pul:S.-¥OlLin,.con=l.of.rhe.cad[redacted]lying_pwcess [redacted]m stan co hnish._
YolLwill also save time at the dealership since there are no dealer credit applications to [redacted]ll out. You'll know all of your terms up front withal!(having to rely on the dealer for your tlnancing. Fi[redacted]ncing before you shop allows you to arrive at the dealership and simply fc)cus on getting a great deal on y[redacted]r next car!
I. Visit us onlin)at www.capitalonecar.com or call] [redacted] and please have your Persona[redacted] ResSvation Number [redacted] when you apply. [redacted]. Upon ap[redacted]al, you'll receive an Approval D[redacted]cument by mail, or for h[redacted]ster shopping, YOll can visit us online to print [redacted] Approval Document.

Stop! Apply For Auto Financing Before You Shop

Don't WaitSave Time At The Dealership

Start Today And Be In Control Of Your Car Buying
[redacted]
I
[redacted]
Personal Reservation Number:
[redacted]
Visit us online at www.capitalonecar.com or call [redacted]
KEEP THIS WITH YOU
[redacted]
Dear [redacted],
I'm [redacted] from Capital One", and I am pleased to inform you that as a valu[redacted]cardholder, you've been pre-selected for this auto financing offer through Capital One Auto F[redacted]nance.... Your preferred statlls gives you the green light to apply for auto financing with competitiv[redacted]ates and no down payment required!
[redacted]. 'lake the Approval Document to the dealership and choos[redacted]r vehicle!
So apply online at www.capitalonecar.com or call [redacted] to enjoy hassle-free auto fi[redacted]ncing!
Sincerely, ?PfNJ [redacted]
[redacted]Director of Accounts, Capital One Auto Finance
~ P.S. Visit us online at www.capitalonecar.com or call [redacted], and apply for [redacted]uto ~ financing with competitive rates and no down payment required!
[redacted] and [redacted]
See Tt'l[redacted]erSe for [redacted]pOrftl[redacted]t Disc![redacted]U res regarding this o..tNr.
[redacted]

Redacted data

Further information and guidance on the regulations is available on the gov.uk website: https://www.gov.uk/government/publications/guide-to-the-general-data-protection-regulation [Dec 2019].

Top tips for Portfolio production

Firstly, you should consider the suitability of your evidence. Your IEPA will need to be satisfied that your evidence is:

- ✓ sufficient
- ✓ authentic
- ✓ relevant
- ✓ current

You need to ensure any evidence included in your Portfolio meets these criteria.

What is sufficient?
The evidence must cover all aspects of the assessment criteria it is being claimed for. *Sufficient* does not mean a huge amount of evidence; it simply means collecting enough evidence to demonstrate KSB competencies.

What is authentic?
Apprentices must be able to explain and substantiate the evidence they put forward; in other words, they must be able to confirm that it is a true representation of their own knowledge, skills and behaviours. It is important, therefore, to ensure they only submit evidence relating to **their own** performance. There will be a declaration that they must complete on submission of the Portfolio; to confirm that all the evidence is *authentic*.

What is relevant?
Any evidence must clearly relate to the criteria it meets. IEPAs are only interested in evidence directly related to the requirements set out in the standard. That is, evidence which undoubtedly links the performance with the specific areas / criteria from the standard.

What is current?
'Current' means evidence relating to the skills, attitudes and knowledge the apprentice can currently demonstrate. The dates of the evidence / documents are important here – the evidence must have been produced and collected whilst on-programme.

Your ITP can help you to determine what is sufficient, authentic, relevant and current.

What else?

- ensure the evidence does what it is claimed it does – for example minutes of meetings don't necessarily demonstrate someone's competencies; only that they attended a meeting.
- it should be very clear on each piece of evidence which criteria it relates to – the IEPA will not do this for the apprentice, and a collection of submitted papers / evidence not referenced properly may be returned.
- there should be no personal / client / customer information on the evidence – for real documents, take out this information and / or create pseudonyms if needed.
- remember – it's all about the **quality** of the evidence and not the **quantity**. Apprentices should choose evidence which can be clearly and easily linked to their standard criteria, and the best pieces will match multiple criteria, rather than only one. Also check the guidelines from NCFE in relation to how many pieces of evidence are expected / required.

9. Reflective Journals and Witness Statements

What are they?

Reflective Journals and witness statements are written records of work-related activity that has happened while the apprentice is on their learning programme. Reflective Journals use the experiences of the apprentice during the on-programme phase of their apprenticeship to review their individual progress and development. Reflection should be a purposeful activity in which a professional analyses their experiences, skills, practice and responses, in order to learn and improve.

Throughout the programme of study, for both on and off-the-job learning, the apprentice should record their learning, reflect on it and draw conclusions in relation to how it impacted on their future development activities and professional practice. In this sense, it is similar to recording CPD and its impact, but also takes into account the observations and statements from others. Witness statements can be completed by anyone involved in the apprentice's learning. They are most likely to be completed by their colleagues / managers, but could also be provided by their ITP or any service users, patients, clients and / or stakeholders the apprentice has worked with.

Reflective Journals and Witness Statements can be completed by hand or digitally, but must be authenticated and include dates and the signatures of the people involved. They will normally be used as the basis of a question and answer or discussion activity, so they must be genuine and accurately record real events, to allow the apprentice to provide more detail - if required - at the point of EPA.

The subject and topic of the Reflective Journals should be decided by the apprentice; each time they encounter or experience something new, different or that they learn something from, they should record it and reflect on it. Apprentices should review which criteria from the relevant standard is assessed using this method, and structure their journal entries based on the criteria being assessed. Journal entries could be related to something that went well, but it should be remembered that learning can and also does take place when something goes wrong! The key here would be for whatever the context of the learning experience, that the apprentice reflects carefully on the reasons why it went well / poorly, and what learning they should take from it to ensure that their practice, skills, knowledge and behaviours develop because of it. Witness statements will be completed by people the apprentice has worked with. These should be accounts of real events, could be very detailed or simply a summary of something that happened in the workplace, where the apprentice showed competencies related to the standard criteria.

Tips for writing Reflective Journal entries

- start writing them near the start of the programme of learning – don't leave them until the end as it will be impossible to remember the level of detail needed weeks or months later.
- write each entry as soon as possible after the event; record your thoughts / ideas as soon as you can to help you to capture everything accurately.
- be objective – take a 'step back' to help make the entries more evaluative and reflective.
- remember to use good and bad experiences – we learn more from getting things 'wrong' than 'right'!
- be honest – it should be somewhere 'safe' to record your learning and reflections on work-based experiences and developing skills and knowledge.
- stay 'professional' – remember the audience will be the IEPA and you're recording your development as a professional. It might be best to anonymise entries – remember GDPR and if you're working with clients / patients and sensitive information, you should be careful about what you record and how you record it.
- consider using a structure/model to organise the ideas – one possibility could be:
    - **situation** – what actually happened?
    - **affect** – what was its impact on you and /or others?
    - **interpretation** – what did you learn from the experience?
    - **decision** – what did you decide to do as a result of the experience?
- another structure could be:
    - **reflecting** on your own practice
    - **scrutinising an experience**, what happened and the way you dealt with it
    - **evaluating** a project or aspect of your work and considering how it could be improved next time
    - **reflecting** on the influencing factors and / or things learned from it
    - **linking theory to practice** – how does theory relate to reality?

Also see the reflective cycle examples in Appendix II

"It is not sufficient to have an experience in order to learn. Without reflecting on this experience it may quickly be forgotten, or its learning potential lost" (Gibbs: 1988:9)

Gibbs, G (1988). *Learning by doing: a guide to teaching and learning methods*. Oxford: Further Education Unit, Oxford Polytechnic

How to prepare

Apprentices should plan to review their work and practice at every opportunity; this does not mean every time they do something, but is more about when they do something at work **which they learn from**.

Apprentices should also practice talking to others about their Reflective Journal entries – as they form part of other EPA activities, they will be asked about them, so developing skills and confidence in relation to talking about them will help prepare for EPA.

It might also be useful to write a Reflective Journal entry and also asking any other people involved to write a witness testimony – then compare the accounts to review differing perspectives. This review could then be used to add more detail to the reflective journal, or produce a new journal entry, based on the discussion!

Consider using a standard model for reflection, or using some **standard phrases**. Some examples include:

- I think / felt...
- I was aware...
- I realised...
- I was uncomfortable about...
- looking back, I now think...
- at the time I thought… but on reflection, I can see that…

To help with analysis and interpretation:

For me, the most	significant	element/s	were / was…
	important	experience/s	arose from…
	useful	aspect/s	happened…
	meaningful	issue/s	when…
	exciting	idea/s	resulted in…
	relevant	concept/s	meant that…
This	might be	because of…	
	is perhaps	due to…	
	could be	explained by…	
	is probably	related to…	

To help with making conclusions:

Having	experienced…	I now	think…
	discussed…		realise…
	analysed….		think / know….
	applied…		wonder / question…
I have / however, I have not	significantly	developed	my skills in…
	slightly		my understanding of…
	sufficiently	improved	my ability to…
	considerably		my knowledge / awareness of…
	really		
Because I…	did / have not yet…		I will now need to…
	am not yet confident about….		
	do not know / understand		

10. Continuous Professional Development

What is it?

Continuous Professional Development (CPD) is the process of planning, tracking, documenting and reviewing the knowledge, skills and experiences we gain at work. This includes both formal and informal learning , development and training, beyond any initial training. It should plan, record and evaluate what we experience and learn, and most importantly, how we then use and apply it in our everyday practice.

CPD evidence is normally collected and kept in a physical or digital portfolio, documenting our development as professionals. CPD normally focusses on the identification of formal development priorities, how professionals use these - as well as informal learning opportunities, to reflect on their learning and development.

Although CPD will be individualised, it will not be carried out in isolation. Many people will impact on our CPD; colleagues, managers and clients / customers, and ITPs will also input on and influence it. Formal training opportunities play a large role in CPD, especially when learning to do something specific, such as learning a new skill or competence. However, developmental and more informal activities are just as important; these are normally related to capability, behaviours and competencies - progression from basic know-how to more advanced or complex understanding and adapting working practices.

Relating these points to EPA, an apprentice would document their CPD activity, reflect on it and how it has been applied in their day-to-day work. It is not only a record of training attended; it should also include detailed reflection on the learning and how useful / relevant it was to use in practice. It should be for both formal and informal training and development, could relate to both on and off-the-job learning and provide an overview of professional development whilst on the apprenticeship programme.

CPD is often a requirement of membership of a professional body / organisation. It should help us to reflect on it, document and review learning and help to manage developing professional knowledge and skills. It can be useful to help apprentices to:

- have an overview of their professional development whilst on-programme.
- identify and acknowledge their acheivements and successes.
- identify any gaps in skills, knowledge and capabilities, whilst also providing an overview of how the gaps were filled and / or problems overcome.
- identify their further development needs and opportunities.
- demonstrate their commitment to CPD activity.
- exhibit their professional standing and attitude to clients and employers.

How to prepare

The evidence of CPD activities undertaken will be reviewed at EPA; the IEPA will base their questions and / or discussion focus on the contents of the apprentice's collection of CPD evidence. The apprentice must therefore be familiar with the evidence they submit, and be able to confidently talk about it, answer questions and elaborate further on how the activities contributed to their learning and development in the workplace whilst on-programme. It is vital that the collection of evidence is not left until late in the programme; recording starting skills and knowledge would be extremely useful, and as CPD activities are planned and occur, an ongoing log of the activity should be maintained.

Apprentices could consider:

- what learning they received from colleagues or gained and shared in networking.
- learning about new technologies and / or methods of working.
- any ongoing changes in legislation relevant to their industry / working.
- any insights / learning points gained from coaching and mentoring.
- reflections and learning points from taking on new responsibilities.
- organisational or role changes.
- secondments / temporary role changes within their organisation.
- deputising or covering for work colleagues.
- insights and lessons learned from critical incidents and / or mistakes.

11. Case Study

What is it?

A case study involves evaluating a theory or process based on a given scenario. It is a written account - containing information about a person, group or situation, based on a particular context / setting. For EPA, apprentices would be provided with a case study – an anonymised overview of a specific work-related situation, and be asked questions related to it, make decisions and / or recommendations related to it or to explore and review it as part of a Professional Discussion.

There will be sufficient detail provided in the Case Study to allow the apprentice to make informed decisions about it. The questions asked about the case study will be informed by the standard criteria it is assessing, so taking notice of these will help prepare the apprentice for the EPA activity.

How to prepare

Remember – as for all EPA methods, it is a good idea to look at the criteria the Case Study (and any other relevant EPA activities) are assessing. This should inform you of the specific KSBs and competencies being assessed, and allow the apprentice to make an informed choice on the focus of their revision and preparation activities.

EPA for a Case Study requires the apprentice to draw from their experiences in industry whilst on-programme, and use them to make informed decisions on the given scenario. Practising doing this is therefore important, so examples from their work context and an exploration of how they might deal with / handle different work-based situations would be beneficial. Employers and ITPs play an important role here – to ensure the apprentice feels prepared for EPA; a range of different scenarios should be explored, discussed and reviewed with them.

Encouraging the apprentice to keep a learning diary might also be helpful – reviewing their work and experiences on an ongoing basis, and having something for them to review and discuss in preparation for EPA, could support them to prepare for the Case Study EPA activities. The employer and ITP could also explore their own case studies – using their industry experience to broaden the apprentice's range of knowledge and understanding.

Example health case study:

Edith was diagnosed with dementia 18 months ago. She is 75 years old, and lives at home with her 78 year old husband, Jack. She also has long-term mental health issues, and a diagnosis of depression and anxiety. Edith has had previous surgery (20 years ago) to remove gall stones, but her physical health now is generally good. Edith has a hearing impairment and wears hearing aids, and Jack has ongoing treatment for a visual impairment (Wet AMD).

Jack is keen to access support to allow Edith to live in their family home for as long as possible. They have 2 grown up children; a son who lives locally and a daughter who lives abroad. The family are keen to support and help, but work and living arrangements mean they are unable to spend much time with them. There are a number of dementia support groups in the local area; Edith attends a day centre one day per week and they also have links to the Alzheimer's Society and joins in their activities on a monthly basis.

They both attend church regularly, and have many friends, but socialising with them is becoming more difficult – as Edith's dementia progresses. Jack is becoming more detached from his support groups as he feels that as Edith's health is deteriorating, they are unable to get out of the house as much as they used to.

Questions for discussion

1) What would be your intial concerns about Edith and Jack?
2) What questions might you ask them to ascertain the best way forward in relation to their support needs?
3) What legislation relates to this case study?
4) What points of referral might there be for Edith and Jack?
5) Explain how you have worked with this type of service user whilst on your apprenticeship programme.

12. Role Simulation

What is it?

Role Simulation is an activity which is made up of tasks related to a fictitious organisation, where the apprentice is provided with sufficient background information to problem-solve and make recommendations for the organisation, based on a given scenario. The apprentice will take the role of a professional in the sector, and based on the information provided, provide a service to the organisation which will be relevant to the apprenticeship standard. The aim of this EPA method is to simulate typical challenges encountered in the workplace, and the activity will have a clear business context. The importance of professional responsibilities and ethical working practices are also core components of this EPA activity.

The background information will be provided in advance of the EPA activity, and apprentices will have the opportunity to read and analyse it, and also discuss it with their colleagues.

The Role Simulation will take place under controlled conditions – there will be an invigilator and a given set time to complete the task/s. Apprentices will normally be able to bring materials with them which they think will help them, e.g. course manuals, as well as the background information, which can be annotated, but this should be checked with the IEPA in advance. Other resources such as pens and calculators can also be brought and used.

How to prepare

This is a synoptic assessment, and will be designed to cover the breadth of KSBs detailed in the apprenticeship standard. It is therefore important to review which KSBs are assessed in the Role Simulation, as this will help the apprentice to feel more prepared for the EPA.

Apprentices should take every opportunity to discuss what type of scenarios would make up a Role Simulation activity with their colleagues, employer and ITP. Awarding organisations will provide sample resources to demonstrate the type of resources will be used, and using these to inform preparation activities will be very useful for apprentices.

13. Showcase

What is it?

A Showcase is a collection of the apprentice's teaching and learning evidence, presented to the IEPA at the end of their programme, as part of the EPA activities. Collected and collated in conjuction with their employer and ITP, the apprentice should highlight examples of their development by presenting selected evidence to the IEPA.

The apprentice should review which criteria is assessed in the Showcase, and focus their evidence collection and presentation planning on the areas they must show competencies in. It can be thought of as completion of a work-based project (collecting evidence) then a presentation of the evidence to the IEPA.

Similarly to other EPA methods, the focus should be on **quality** and not **quantity**. Guidance regarding the number of pieces of evidence will be provided, and as for the Portfolio, evidence which covers multiple criteria is best. The types of evidence typically collected for this EPA method include:

- observation feedback forms
- self-reflections
- witness testimonies
- employer statements
- copies of performance reviews
- customer / client feedback

How to prepare

As for other EPA methods, this will be designed to cover the breadth of KSBs detailed in the apprenticeship standard. It is therefore important to review which KSBs are assessed in the Showcase, as this will help the apprentice to feel more prepared for the EPA.

Related to the guidance for presentations, it is useful to remember that some work areas are more likely to expect employees to give and deliver presentations than others. As previously stated, in a business / managerial and / or customer facing role, work-based presentations are commonplace, but in more practical contexts, presentations are less likely to occur. As for other EPA activities, preparation is key. Thorough planning of the presentation in the Showcase would be good practice.

Apprentices should:

- practise giving presentations and talking to groups of people at work.
- consider making notes to support their presentation – **but this should not be a script to read from.**
- find out if they can use supporting resources in the presentation, for example PowerPoint / Prezi.
- try to anticipate the questions they may be asked related to their Showcase.
- show their passion and interest for the subject of the presentation – enthusiasm is contagious!
- remember the importance of non-verbal body language - smiling and making eye contact are important.
- expand on the points they make by providing examples.
- link what they are presenting clearly back to the standard / criteria which is being assessed.
- speak clearly enough for the audience to hear easily – and consider what type of language is appropriate for a work-based Showcase.
- the speed of their delivery - nervous speakers tend to talk very fast – be aware of this and slow down.
- how much they read from their PowerPoint; if used, the talker should remember that the audience will more than likely be able to read the slides – so they don't need to read them out!
- put themselves in the audience's position – consider their presentation from the 'other side' and think about what they find engaging / interesting and important.

Appendix I – Models of feedback

Feedback models

WWW/EBI model

- ✓ **what went well:**
  - using specific examples from the observation, for this model, the observer highlights areas of good practice / competency witnessed during the observation, and provides clear and specific instances when strengths were observed / witnessed
  - observers should link the feedback to the relevant apprenticeship standard KSBs.
  - It would also be useful here to ask the apprentice / observee what ***they felt*** went well; ask them to identify their own strengths and abilities. This will support them to be reflective whilst building their self-confidence
- ✓ **even better if:**
  - builds on the positivity of 'what went well' - the observer can make suggestions for improvement-related to how the apprentice could develop their KSBs further. This might include additional improvement of an existing strength, but is probably more relevant to to areas of under-performance which are in need of improvement.

A useful point to note here is to explore what the feedback might 'look/sound' like when there are limited areas of good practice, e.g. if nothing went well! Without being overly positive and / or being blasé about the poor practice observed, the observee needs to receive an open and honest account and opinion regarding what happened, without the feedback negatively impacting on their confidence and motivation. Observers should strive to find something positive to say, but the feedback should be constructive and be helpful to the observee; to inform development priorities for them as an individual.

SBI model – situation-behaviour-impact

This tool bases feedback solely on facts so the individual can understand the effects of their actions.

- **Situation**: describe the situation with specifics – not necessarily everything about it; choose the most important points here – relevant to any strengths / development areas you will move onto.
- **Behaviour:** describe the behaviour/actions observed, but don't try to guess at the motives, explanations or causes of the choices made by the observer.
- **Impact:** describe the impact the observed behaviour/actions had. The observer will probably need to use and draw from their own subject knowledge and experience here.

The SBI model is a favourite among organisations for its succinctness. It is useful in that it can help to keep emotions out of the process. It's important to use "I" statements (e.g. I observed/noticed this/that etc.) and withhold judgement when using this feedback model; otherwise, it will undermine the feedback being given.

DESC Model

Using the DESC (describe, express, specify, consequences) model to structure feedback helps make your message clear and can also alleviate some of the stress involved with the delivery. It can help to prepare what you would like to say beforehand.

Structure your feedback to include the following:

- **Describe:** Use "I" statements to clearly describe the behaviour you observed. Using "you" can come across as aggressive. Focus on just one recent action, and try to use non-judgmental language.
- **Express:** Objectively describe the impact the action had on you, team members, and the business, including how it made you feel.
- **Specify:** Clearly specify what you would like them to do differently next time. You can do this through a directive (What I would like to see happen in this situation next time is…) or a participative (How can we avoid this in the future?)
- **Consequences**: Make it clear what the consequences of this behaviour change will be. Ensure they know the positive impact this change will have for both of you. If necessary, explain the negative consequences of not making these changes.

STAR model – situation / task, action, result

- **Situation / Task**: describe what was observed – the particular situation or task the apprentice was involved in, being as specific as possible.
- **Action:** write down the action/s observed, including details of what happened, in as much detail as possible, including both positive or negative points.
- **Result:** identify the result of the action/s so the apprentice understands what they did right or wrong.

'Coaching' approach

A summary of how this works in practice, relates to how professionals can be supported to identify their own improvement priorities, what their options are and what action/s they will take. When using a coaching approach to providing feedback and supporting an apprentice to improve, this would mean that the person providing the feedback does not simply 'tell' the apprentice what they did right / wrong; instead, they ask questions and enter into a dialogue which supports the apprentice to reflect on their performance / practice and devise their own improvement opportunities and options for action.

Coaching approaches use different methods of structuring the dialogue / feedback. One method is to use the **'GROW'** model:

- **G**oals – the person providing the feedback asks the apprentice what their own **personal goals** are. The success of this depends on the apprentice's awareness of their competencies, some input / guidance might be needed to ensure the correct and most appropriate goals are identified. It might be that a recent assessment of progress activity is referred to for this, or it could be simply about general progress being made – in the workplace and / or on the programme.
- **R**eality – the next question would relate to the **reality** of the current situation – asking the apprentice to reflect on how changing what they do / have done would improve the situation and help them to make progress, and also what obstacles might be in the way of making the changes. This conversation would identify the benefits and barriers to making progress, and would need the apprentice to be very honest. Support might be needed to help them to do this effectively.
- **O**ptions – next, the process moves onto **exploring the options the apprentice has**. They would be asked "so – what could you do?" to get them thinking about how they could adapt / change, but also who might be able to help/support them to do this. The questions about options then continue further – by also asking "what else could you do?", and this question should be asked multiple times; to really get the apprentice to think deeply about what other options they have – until the conversation runs out of ideas. There will be differing levels of input here – depending on how forward thinking / creative and aware the apprentice is. Making notes related to the options is important here – to refer back to later and use to focus how the apprentice will move forward from this point.
- **W**ill – the final section asks the apprentice to commit to action/s – they finish off by identifying **which of their options they will do** from the list they have produced**.** It might be that the person providing the feedback might also do something to help – but it should be focussed on the apprentice taking action. There will probably be some discussion here related to which of the options might be best – and some apprentices may need more guidance than others, but also, other 'new' options may be identified here too.

The goal of using the coaching approach is primarily to empower the apprentice to reflect on their own competenices, identify the benefits and any barriers to making changes, review how changing practice would benefit them and others, explore their options for change / development and commit to action as appropriate. When used effectively, this approach raises self-awareness and inspires professionals to change and develop, with the support of their colleagues / managers / contacts. People don't always learn and / or engage with feedback when they are 'told' how they are performing / about the progress they are making / not making; this approach encourages self-evaluation and should support the apprentice to be more self-aware and positive about what they need to do to develop and be engaged in PD activity.

Appendix II – Models of Reflection

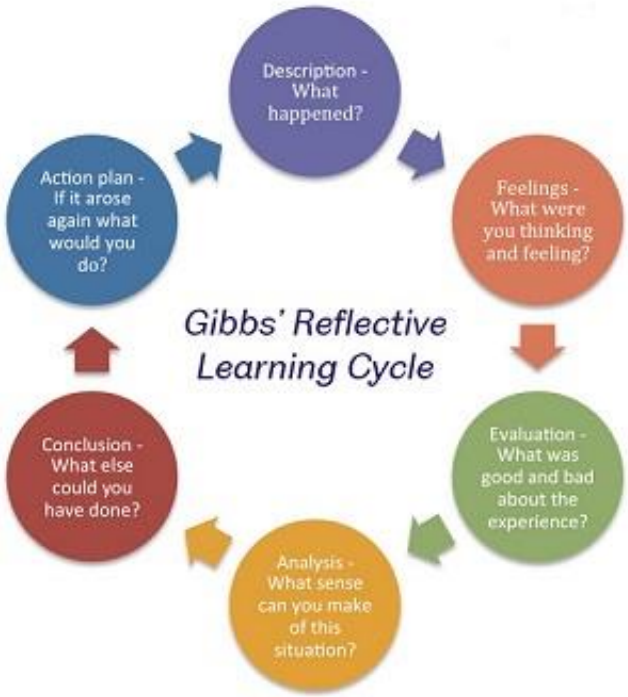
Models of Reflection

Gibbs' Reflective Cycle (1998)

Based on 6 stages:

1. describe what happened
2. what were you thinking / feeling?
3. what was good and bad about the experience?
4. what sense can you make of it?
5. what else could you have done / what could you have done differently?
6. what would you do in the same situation, if it happened again?

This helps you to think systematically about the differing phases of an experience or activity. It is important to consider all influencing factors, but as we tend to focus on negatives, this model asks you to acknowledge thoughts and feelings, the good and bad points, how we can take a 'step back' and make sense of it then plan a constructive way forward. This structures our thoughts to help us to plan something positive with our learning from the activity, and provides a good starting point for converting new learning and knowledge into action and change.



Kolb's Experiential Learning Cycle (1984)

Kolb's four-stage theory takes a holistic perspective to learning which combines experience, perception, cognition and behaviour.

1. Concrete Experience (*'do'*)

The first stage is the concrete experience – this can be planned or by chance, where the learning 'incident' takes place.

2. Reflective Observation (*'observe'*)

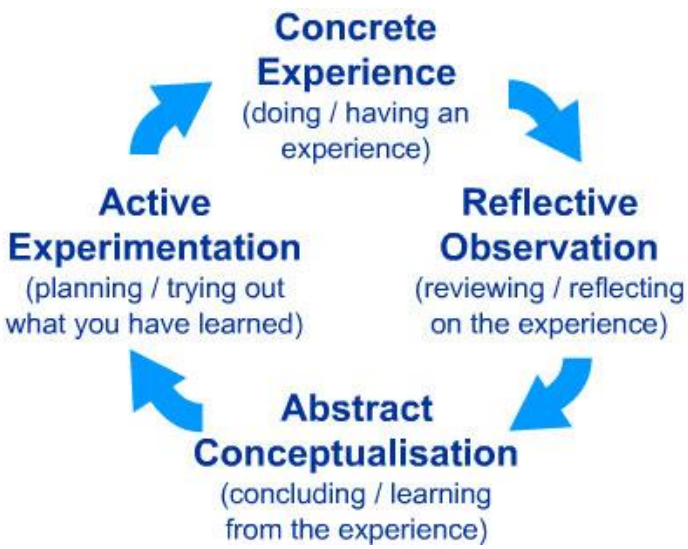
The second stage requires you to consciously reflect on what happened.

3. Abstract Conceptualisation ('*think'*)

The third stage relates to think about what happened and try to make 'sense' of what happened. It is helpful here to make links to existing knowledge / prior experiences to conceptualise (think about) a theory which explains what happened.

4. Active Experimentation ('*plan*')

The final stage tests out the new knowledge / theory / skill, and helps us to plan the best way forward, using the learning to develop our practice.



Schön's Reflective Cycle (1983)

This model asks you to carry out reflection before, during and after a learning experience.

Before	During	After
What do you think might happen?	What's happening now, as you make rapid decisions?	What are your insights immediately after and / or later when you have more emotional distance?
What might be the challenges?	Is it working out as I expected?	In retrospect, how did it go?
What do I need to know or do in order to be best prepared for these experiences?	Am I dealing with the challenges well?	What did I particularly value and why?
	Is there anything I should do, say or think to make the experience successful?	Is there anything I would do differently before or during a similar event?
	What am I learning from this?	What have I learnt?

This method works best for planned learning activities, as it might be difficult to refer to the 'before' questions if the learning experience was unplanned / unexpected. However, it would still be useful to use it and think back to the 'before' questions later, to help analyse how prepared you were for the experience.

Reflection-in-action

- Works on getting to the bottom of what is happening in the experiencer's processes, decision-making and feelings at the time of the event or interaction.

Reflection-on-action

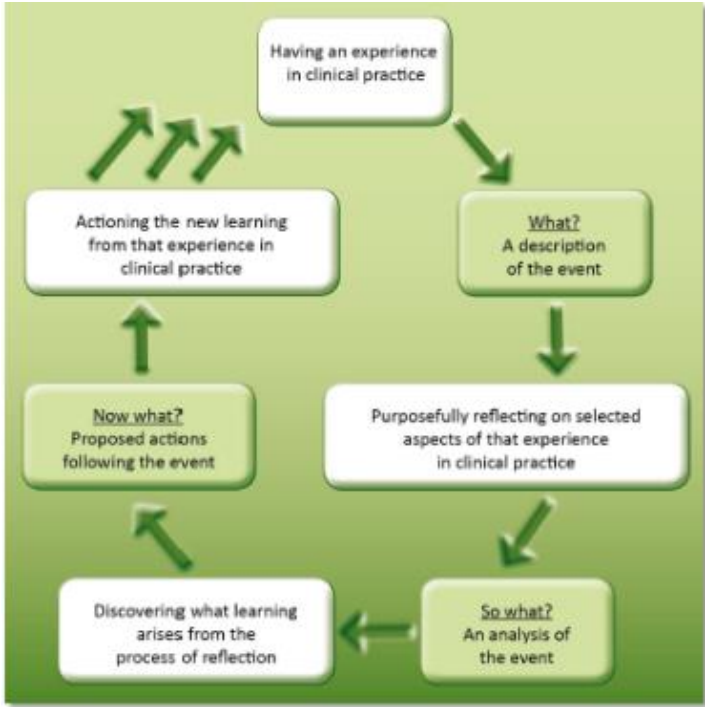
- Works of sifting over a previous event to take into account new information or theoretical perspectives available in conjunction with the experiencer's processes, feelings and actions.

Schön (1983) also refers to the difference between reflection-in-action and reflection-on-action. This theory relates to how a professional carries out an action, and that action generates an effect on the situation, which provides feedback for the professional to endorse, modify or adjust their approach.

This approach may require a high level of personal awareness to be successful – to allow the apprentice to reflect on what they are doing in 'real time'. It may be that this level of self-consciousness would be more suitable to use nearer the end of their programme, rather than at the beginning.

Driscoll's model (2007)

Driscoll's cycle uses 3 questions: '**What?'**, '**So What?**' and '**Now What?**' to structure our thoughts in relation to our learning experiences. It provides a structure which can be used at any stage in learning,



WHAT? (returning to the situation)

- is the purpose of returning to this situation?
- exactly occurred in your words?
- did you see? did you do?
- was your reaction?
- did other people do? eg. colleague, patient, visitor
- do you see as key aspects of this situation?

SO WHAT? (understanding the context)

- were your feelings at the time?
- are your feelings now? are there any differences? why?
- were the effects of what you did (or did not do)?
- "good" emerged from the situation, eg. for self/others?
- troubles you, if anything?
- were your experiences in comparison to your colleagues, etc?
- are the main reasons for feeling differently from your colleagues etc?

NOW WHAT? (modifying future outcomes)

- are the implications for you, your colleagues, the patient etc.?
- needs to happen to alter the situation?
- are you going to do about the situation?
- happens if you decide not to alter anything?
- might you do differently if faced with a similar situation again?
- information do you need to face a similar situation again?
- are your best ways of getting further information about the situation should it arise again?

Appendix III – Exemplars

Reflective Journal record

Apprentice name	'Apprentice A'
Standard	Adult Care Worker L2
Location	Summer Woods Care Home, Carlisle
Corresponding with Employer Statement provided by	Mr Tobias Quinn (my manager)

The **Reflective Journal** is a personal record of your learning experiences. It is a space where you can record and reflect upon your duties and responses to situations you have come across in the course of your work. You should provide **4 to 6** reflective journals to showcase your competence for the **End-Point Assessment (EPA).**

Please reflect upon your duties being guided by the identified themes – please provide as much detail as possible and use a duplicate sheet where required. Your Reflective Journal should correspond with your Employer Statement.

Theme 1: What have you learnt from the task undertaken or related training associated with the task?

Linked to 'Encourage individuals to participate in the way their care and support is delivered'.

I was supporting 'Mr K' in the dining hall having his breakfast. He was having cereal, and I was using the spoon to give him the food. He told me that he had noticed that his hand tremor was improving, so I asked him if he wanted to try using the spoon himself, to see if he was able to feed himself. His answer and reaction was 'no' – he didn't want to make a mess and / or a fool of himself in front of everyone, so I reassured him that this was ok, and I continued to feed him. At lunchtime, I was asked to help 'Mr K' again with his lunch. It was a pasta dish, and before I could even give him the first spoonful, he stopped me. He said he'd been thinking about our conversation at breakfast, and had decided that he would like to try and use the spoon himself. I was really pleased, but suggested to him that I got him a spoon which was easier for him to hold, and he thought that was a good idea. I said I would stay with him during the lunch period just in case he wanted help, but he did really well and was able to eat the pasta, using the spoon himself. I then helped him with his dessert as this was rice pudding, and he was tiring and concerned he would spill it. When he finished his lunch, he thanked me for my support and said he was really happy that he had fed himself the pasta.

I was really pleased that I had made the suggestion to use the spoon, but not push him to eat independently before he was ready and had the confidence himself. What I learned from the experience is that patients might tell me things to test if I thought they were ready, and my role is to encourage them to be involved in activities more, whilst making sure that it is better if it is their own choice and they have the final say about how they are supported. I was really pleased that 'Mr K' came back to me after thinking about our earlier conversation, and that he felt that I had empowered him to make the decision himself while I continued to support him. When I spoke to my manager about it, he said I could help him to update the individual care plan.

Theme 2: How have you demonstrated compliance with Safeguarding and Protection policies?

The Safeguarding policy associated to this relates to protecting the human rights of patients and working with them to empower them to make their own choices and decisions. It is also about working in partnership with them to identify the type and level of care they would like and need. It was important that I let 'Mr K' make his own choices, but that I was there when he did want the help with the rice pudding. Our working relationship remains strong and positive as he made his own decisions about the level and type of support he received and felt able to ask me to help him when he did want the help and support.

Theme 3: What Good Practice and Care approaches have you demonstrated?
I think I demonstrated good practice by taking notice of what 'Mr K' told me about his hand tremor improving, making suggestions about adapting the level of support and responding properly to his wishes. I could have said nothing and just continued to feed him - as I had been told to by my manager, but I think I was forward thinking by making suggestions about the spoon and supporting him to do what he wanted to do. My manager told me that I had been proactive and that is about being responsive to the patient's needs by thinking about what they tell me and what that might mean in relation to the level and type of support I give them. I'm really happy that 'Mr K' thanked me, and when his family visited later in the day they came to talk to me to say thank you for what I'd done. They said 'Mr K' was so happy that he had made progress today and that I had played a big part in that. It made me feel good that I was able to help 'Mr K' and I will make sure I will take what I learnt from this to when I work with other patients. Often, I will have to 'read between the lines' to make sense of what they are telling me; to allow me to make appropriate suggestions.
Theme 4: How have you met Health and Safety requirements within the task undertaken?
I had to ensure that the pasta was not too hot – in case 'Mr K' dropped any on himself and hurt himself. There was a little bit of pasta dropped onto the floor, but I did not make a big scene about this and just picked it up and wiped the floor clean to make sure nobody slipped on it. Once 'Mr K' had gone to the day room, I cleared everything away, wiped the floor and put up a 'wet floor' sign.

Apprentice name	Apprentice 'A'	Date	2nd January 2020
Apprentice signature	Apprentice 'A'		

I confirm that the above Reflective Journal is a true account of the apprentice's performance in this situation:

Employer name	Tobias Quinn	Date	2nd January 2020
Employer signature	T. Quinn		

Employer Statement

Apprentice name	Apprentice 'A'	**Statement No.**	1
Standard	Adult Care Worker		
Location	Summer Woods Care Home, Carlisle		
Statement provided by	Tobias Quinn		

Briefly describe the relationship between the person providing the statement and the apprentice.

I am his line manager and he started working for us 4 months ago. I manage the floor he works on, and his daily work and tasks are provided by me on a daily basis.

Statement of the apprentice's performance – please provide as much detail as possible and use a duplicate sheet where required.

Apprentice 'A' was working in the dinig hall, supporting 'Mr K' with his breakfast.

Mr K has Parkinson's disease and has recently been given new medication to help him with his hand tremors. This medication is having a positive impact, and 'Mr K''s tremors are improving. I saw 'A' talking to Mr K, and as I was monitoring the breakfast tables, overheard what their conversation. 'Mr K' said that he had noticed a marked improvement in his hands, which 'A' responded really positive to and asked him if he would like to use the spoon himself to eat his cereal. 'Mr K' turned this offer down, but this did not dishearten 'A'; he said that was absolutely fine and continued his duties as directed. 'A' was very positive and helpful – he did not react badly at all to the offer being turned down and continued to chat to 'Mr K' about the footballt score from last night, as 'Mr K's' team had won.

At lunchtime, I noticed a big change when I walked into the dinner hall. 'A' was still sat beside 'Mr K', but this time 'Mr K' was using the spoon himself to eat his lunch. 'A' was still beside him, offering support and encouragement. 'Mr K' was managing ok – only a few bits of pasta were dropped and 'A' was keeping the mess to a minimum whilst being supporting and not making a fuss and / or issue about the mess being made. 'A' followed the correct H&S procedure by tidying up and putting a wet floor sign up after 'Mr K' had left the dinner hall.

After this, 'A' and I spoke about what had happened. I asked what had happened, and he told me that 'Mr K' had mentioned the improvement in his hands he had noticed, so he had suggested that he use the spoon himself but that 'Mr K' had not done this until lunch time. We talked about how 'Mr K' had mentioned something specific which 'A' had picked up on in a positive way – I said that this was being proactive and we talked about what that meant and how he could use this approach with other patients.

We talked about how his approach related directly to 'encouraging individuals to participate in the way their care and support is delivered' from his apprenticeship standard, and I suggested that he reflect on what had happened and write up a reflective journal record about it.

Statement provided by name	Tobias Quinn	Date	3rd Jan 2020
Statement provided by signature	T. Quinn		

I confirm that the above statement is a true reflection:

Apprentice name	Apprentice 'A'	Date	3rd Jan 2020
Apprentice signature	Apprentice 'A'		

The Reflective Journal is a personal record of your learning experiences. It is a space where you can record and reflect upon your duties and responses to situations you have come across in the course of your work.

Apprentice name	Apprentice 'T'	**Journal No.**	1
Standard	Teaching Assistant		
Location	Turrington Green Primary School, New Town.		

Please reflect upon your duties being guided by the marking criteria. You should explain the following points for each situation you reflect upon:

- What the situation was
- How you dealt with it
- What you learned
- How you will use what you have learned in future situations. Would you do the same or are there things you would do differently?

I was asked by the reception class teacher to do some development work with a small group in her class on phonics. The class have been working on blending the sounds 'op' 'ap' 'ild' and 'ind' but 4 of the pupils were struggling and falling behind. I asked if I could create something new to do this – and the teacher said that was a good idea. I did some research, found some example worksheets and used them to create a resource to use in the class the following day. I didn't get the chance to show the teacher the resource I had made, but she said not to worry; that I should try them out and see how well they worked. I tried to make the resources look fun and engaging - I put a decorative page border on them and made sure there were pictures on them too, as I think these are important.

In the class when I used them, the pupils were a bit reluctant to come to my table as they don't really know me very well yet; I've only been in the class for 2 weeks. Once the teacher had rearranged the group so the pupils were with me, I thanked them for moving and said we had some fun work to do. I had 1 girl and 3 boys in my group.

The girl was the most engaged; she started completing the handout straight away and asked questions when she struggled. The boys were very different; they didn't get focussed like the girl had and I had to get quite firm with them – saying that they would be delayed in going to story time – or not going to it at all - until they had finished the work I had planned. This made them focus on the task, but also have an even more negative attitude towards me and I had to work really hard to engage them in the task. The first page was a gap-fill; the task was to choose a word from a choice to complete the sentences. The girl completed this sheet on her own then moved onto the second sheet. I had created 3 sheets and expected to get the first 2 completed in the given time; the third sheet was an extension activity. For the first sheet, I facilitated some discussion about what the words could be to go into the sentences, and we had some fun putting the wrong word in – the chatter between the 3 boys related to the wrong words helped them to engage with it. However, there was a problem with this, as the noise started to distract the girl and she started getting annoyed. I therefore moved her slightly away from the boys so that she could concentrate, but this then meant that I couldn't effectively support the girl and the separate boys at the same time. When the girl finished the second sheet, I praised her and gave her the extension sheet to complete – these were 'oi' and 'oy' and although we have covered these before, it was good to remind her of them for consolidation.

The boys then needed to be re-focussed on the task, and I gave them the second sheet. This sheet was more visual and had a range of tasks on it – and the boys started talking about the pictures on it – and one of them started to add to the images. They really struggled with the 'igh' words and I think it was too hard for them (the teacher also talked to me about this as it was probably too advanced for them just yet). I got them focussed back on the task and eventually – and after a lot of intervention / re-focussing from me - they completed it. This handout was a little bit fuzzy and unclear – I think I stretched the image too much when I re-sized it for the worksheet, and the boys complained about it. I must remember to check this in future resources as it looked ok on the computer but not so good on the paper.

The teacher then came over to see how we were doing – she praised all the children and told them that when I said they were finished, they could go and join in the story time activity on the big mat. The boys were pleased and started to get up from their chairs; I had to stop them as they hadn't finished the second work sheet yet. They were quite annoyed at this and started complaining again. I tried to get them re-focussed again, and eventually, they completed the second work sheet. The girl had finished the third sheet so I gave her some praise and told her she could join story time. The boys complained at this saying that it wasn't fair that she was allowed to move but they weren't. I then explained that she had completed all her work and an extra sheet, and because of her hard work and positive attitude, could move onto the next activity. It took another 15 minutes for the boys to complete the second work sheet, and they continued to be distracted and off-task for the majority of the time. As story time had started in the same room, it was really difficult to get the pupils to finish the work.

What did I learn from the experience? Would I do anything differently?

- Building my authority – I need to develop the pupils' respect for me and my authority. I need to have a discussion with the classroom teacher to explore how to best do this.
- It was good to have the extension activity prepared in advance – the girl responded really well to this, and she took pride in getting to and completing the extra work.
- Need to check the quality of printed documents – they don't always look the same as they do on screen.
- Building my working relationships with the pupils – it was too easy to be authoritarian and this seems to have negatively impact on them. I need to make sure the activities they do with me are engaging from the start; having them work together in a fun but structured way helped them to engage with me and the tasks in hand.
- Use real life examples - when the pupils can see the relevance and use in a real life setting, they appeared to engage with the tasks far better.
- It would have been good to show the class teacher the resource and talk to them about my plans before the class – I will ask for guidance sooner next time and see what the expert thinks.
- Motivating pupils – how to get them engaged without threats of punishment?
- How to effectively differentiate and keep the small groups I work with together, rather than having to split them up. If all the pupils had worked at about the same pace, the girl could have acted as a peer supporter and I think I could have engaged the boys more if I'd kept them together. I will see how this works in future small group work activities.

I talked to the class teacher about everything and she agreed, but that I shouldn't be too hard on myself as everyone completed the work I'd set and it was a good starting point for future group work.

We talked about the resource I'd produced – in future, she will give me the topic etc with more notice so that I can show her what I have planned in case any changes need to be made. I must remember to get her 'ok' for the standard / level of the work I produce - so that it fits in at the appropriate level and stage of skills development.

Apprentice name	Apprentice 'T'	Date	29th January 2020
Apprentice signature	Apprentice 'T'		

I confirm that the above Reflective Journal is a true account of the apprentice's performance in this situation:

Employer name	Tina Rowntree	Date	29th January 2020
Employer signature	T. Rowntree		

Employer Observation Form

Apprentice's name:	Apprentice 'B'
Statement provided by:	Mrs Cowie
Standard:	Teaching Assistant Level 3
Location:	Wheatfield Comprehensive, Gloucestershire
Date and Time:	9th January 2020

Briefly describe the relationship between the person completing the observation and the apprentice.
Apprentice 'B' supports the lower attaining pupils in my maths classes, and has been doing this since the start of the autumn term in Sept 2019. He works with between 4-6 pupils in my class, 2 days per week.

Criteria covered in this record:	
Knowledge	**Tick (if covered)**
K1. Understanding how pupils learn and develop.	
Understand the need to provide feedback to support and facilitate an appropriate level of independence.	✓
Comprehend appropriate levels of learning resources to identify and help address weakness, consolidate strengths and develop individualised expectations.	
Recognise different stages of child development through school, e.g.: transition between key stages.	
K2. Technology	
Recognise the importance of using appropriate technology to support learning, for example: use of photocopier, tablets, computers, correct programs, for example English, Maths, topic, IT programs.	✓
K3. Working with teachers to understand and support assessment for learning	
Understand the need to accurately observe record and report on pupil's participation, conceptual understanding and progress to improve practice and assessment for different groups of pupils.	✓
Understand the school's assessment procedures for benchmarking against targets set by the class teacher.	✓
Be familiar with assessment materials.	✓

Knowledge	Tick (if covered)
K4. Curriculum	
An appropriate knowledge of the curriculum and context you are working in.	✓
K5. Keeping children safe in education	
Understand current statutory guidance including 'Keeping Children Safe in Education' Part 1, safeguarding policies, Prevent Strategy.	✓
Understand the importance of sharing relevant information, in a timely manner with the designated Safeguarding lead.	
Understand the importance of first aid procedures, recording/reporting incidents and a broad knowledge of Health & Safety Policy.	

Skills	Tick (if covered)
S1. Develop strategies to support and encourage pupils to move towards independent learning	
Use appropriately varied vocabulary to ensure pupils' understanding.	
Deliver interventions in accordance with training given (RAG rating).	
Foster and encourage positive, effective, nurturing and safe learning environments inspiring pupils to take pride in and learn from their individual achievements.	✓

Behaviours	Tick (if covered)
B1. Building relationships/embracing change	
Flexibility, trust, professional conduct, confidentiality and being respectful.	✓
Promote the school's efforts to build positive behaviour for learning.	✓
Promote and exemplify positive behaviour and uphold the school ethos.	✓
Be enthusiastic and open to new ideas.	✓
B2. Adding value to education	
Praise; provide constructive and specific feedback and support pupils, helping them to achieve their maximum potential socially, emotionally and academically through peer marking and reflection.	✓

Behaviours	Tick (if covered)
B3. Promoting equality, diversity and inclusion	
Keep pupils at the centre of everything.	✓
Promote community cohesion and cultural diversity encompassing a full understanding of the school's ethos.	✓
B4. Professional standards and personal accountability	
Demonstrate professional relationships in line with Staff Handbook.	✓
Be diplomatic, a positive role model and maintain confidentiality.	✓
Optimise learning opportunities and reflect on their personal development.	
Demonstrate a willingness to learn and improve personal skill set.	✓
B5. Team working, collaboration and engagement	
Work collaboratively and constructively with the whole school team.	✓
Engage professionally as appropriate with outside professionals.	

Description of the apprentice's activity **Please provide as much detail as possible on the apprentice's performance and the knowledge, skills and behaviours demonstrated. You should include who was present, what you observed and what the apprentice did. Use the key from the table above to mark in the right hand column where your report covers each module. The Independent Training Provider (ITP) will help you with this if you are not sure.**	**Indicate criteria covered**
Apprentice 'B' has worked as a support worker in my class for the first 12 weeks of the school year; this observation / witness testimony summarises my professional observations of his practice from over the first term of this school year.	
'B' is a very positive influence in my classroom. He has established and developed very respectful working relationships with the pupils, is professional and is valued greatly by the pupils in his support group. He engages the pupils well; he assesses their progress against the curriculum, provides motivational and constructive feedback to them and they are far more positive and motivated after working with him.	B1, S1, B2 & B4 K1 & K3
'B' is confident in his use of technology in the classroom, and even provides advice, guidance and support for me when I am unsure about functionality and the best use of IT. His ideas support related to the English skills used in maths is excellent – even I have learned from him! The pupils are far more confident in identifying the reading skills they are using and how important careful reading is when looking at a maths question. He treats each pupil as an individual, and uses his knowledge of their interests and preferences to individualise learning and feedback activities.	B2 & B3 K2
'B' is a very good role model for the pupils, promoting a supportive atmosphere by encouraging the pupils to help each other and promoting peer support. He is a very positive influence on the pupils and is an excellent team worker, having a good knowledge and understanding of the school safeguarding policy and procedure. He communicates with me and other relevant teachers about individual pupil progress and is developing his understanding of the curriculum. We are extremely pleased with his progress and he is an asset to the team and school.	B5 K4 & K5

Observer Name:	Mrs Cowie	Date:	09/01/20
Signature:	M Cowie	Date	09/01/20
Apprentice name:	Apprentice 'B'	Date:	09/01/20
Apprentice signature:	Apprentice 'B'	Date:	09/01/20

Feedback Form

Thank you for taking the time to complete this feedback form. The person who has asked you to complete this form is currently working towards Level 3 Teaching Assistant apprenticeship. As part of their apprenticeship they are required to produce a Portfolio to show they have the knowledge, skills and behaviours to undertake their role. The information you provide in this form will be used as supporting evidence within their Portfolio.

This form asks you to tell us about:

- The situation you are providing feedback for and how well you know the apprentice – for example, you may see the apprentice every week in the classroom or they may provide care for your child.
- How this person has:
  - made a positive difference to you or your child
  - supported the children with kindness, consideration, dignity and respect
  - worked collaboratively to ensure a positive working environment
  - communicated and explained things in a way that you found easy to understand
  - showed commitment to supporting you or your child.

Your name:	Mrs Mother
Apprentice Name:	Apprentice 'B'
Location:	Wheatfield Comprehensive, Gloucestershire
Date and Time:	10/01/20

Briefly describe the situation about which you are providing feedback and how well you know the apprentice you are providing feedback for.
My daughter 'H' attends Wheatfield Comprehensive, and was struggling in maths with fractions. Apprentice 'B' is a support worker in her class, and 'H' joined his group for some extra support with the subject. I have known 'B' since the start of term in September. He is a very positive and professional teaching assistant, always friendly and approachable and the pupils really like him. He encourages the pupils and makes them feel confident to develop their skills and knowledge.

In your own words, please describe how the apprentice you have named above has supported you with the situation you have described.
My daughter worked with 'B' in her maths class yesterday. She was struggling with fractions, and the teacher asked 'B' to work with her. 'H' really enjoyed working with him and the group – she said he made the topic interesting, used examples of real life use of fractions from baking to make it 'real' for her. She was very excited when she finished school and said that it was the first time she had been able to understand fractions – and she completed her homework sheet with no input from her older brother or myself. This is the first time she has done her homework without any support or nagging – and we can't thank 'B' enough!

Person providing the statement:	Mrs Mother		
Signature:	M Mother	**Date:**	10/01/20

I confirm that the witness has provided an accurate reflection of the situation			
Apprentice name:	Apprentice 'B'		
Apprentice signature:	Apprentice 'B'	**Date:**	10/01/20

Reflective Account record

Apprentice name:	Apprentice 'C'
Standard:	Business Administrator Level 3.

Explain the situation: how you dealt with it and what you learnt from it. Would you do anything differently in the future?

I was asked to help the conference and events team on a project related to planning an upcoming wedding fair. The team leader explained who we had contacted and booked so far (including wedding flowers, dress and suit sale and hire, cars, a couple of photographers and an events decorating team) and asked me to research which other businesses could be invited. I produced a list which included wedding cakes and confectionery, video specialists, local hair and make-up businesses, hen and stag party arrangers, jewellers and wedding stationers. I e-mailed the list to the manager, who replied, asking me to contact each of them and invite them to the event. I asked if there was a standard e-mail or corporate wording I was to use to do this, and there was, so I was also sent this – after I had also corrected a spelling mistake in it. I then adapted the e-mail to personalise it to each of the companies, and started a spreadsheet to record my progress. Over the following 2 weeks, all but one business had replied to the e-mail, so I contacted them by telephone instead. I sent my completed spreadsheet to the manager via e-mail, and she was very pleased with my progress, especially as I sent it before the deadline I was given.

The next job I was given was to plan the use of our large banqueting suite for the day of the wedding fair. I used a free online table planning template to do this, using the dimensions of the room I was provided with. I asked each of the businesses who would be attending how much room they would need on the day – and gave them the dimensions of our tables to ask how many tables they wanted to use to exhibit their goods / information. I asked them to let me know by close of business on Monday 25th, so I had enough time to see if what everyone wanted was manageable. Everyone replied before the deadline, and I had to speak to the conference team leader because we didn't have enough room in the suite to meet everyone's request. The team leader and I looked at my plan and agreed that we would need to ask 2 businesses to have less room – as they had requested far more than the others and we could not accommodate their requests. I decided to telephone the 2 businesses rather than e-mail them, and I made sure I was professional and apologetic during the call with them – and they were both fine about having less room – they totally understood. I e-mailed the team leader to tell her that they had agreed, and she replied to me saying I was doing a good job.

Once I had all the businesses confirmed I finalised the table plan and saved it as a PDF. I then sent the PDF out to all the participating businesses, and copied in the team leader. Everyone was happy with the room plan apart from the team leader – she said that there had been a slight change requested by our catering manager, and she had said yes to this but had not had the chance to tell me before I sent out the room plan to everyone. She wasn't annoyed with me, but we agreed that it was a lesson learnt – I should have confirmed the plan with her before sending it to the external people. This meant that our catering manager had to alter his plans to fit in with what I had agreed with the businesses. In future, I must remember to do a final internal check before sending information out to external people.

I then had to liaise with the banqueting team – to let them know how to set out the room on the day. I agreed with each of the businesses when they would come to set up before the event, and also let the banqueting team what I had agreed with each of them. I continued to use my spreadsheet to record all of the relevant information and saved it in the hotel's shared area so each department could access it for their information.

On the week of the event, I met with each of the businesses when they arrived to set up, showed them to the banqueting suite and introduced them to the banqueting team. An electrical point for one of the exhibiters did not work, so I asked the estates team to have a look at it. They fixed it straight away and everything was ok. The day of the fair went really well; lots of people came and the conference and events team said they were very impressed with how well I had organised the event.

When the fair was finished and the tidying up started, it got a bit hectic with cars and vans all wanting to park at the exit of the room to load up the equipment etc. I realised that I had arranged the set up but not the clear up! This is something the team leader and I spoke about, and she hadn't realised that I had not considered this. She apologised for not highlighting this to me, and said that she had therefore learnt something too! I did my best to stay calm and liaised with the banqueting team to oversee the clear-up with the minimum amount of fuss. The team leader also said

that she had been given feedback from some of the businesses and internal departments involved in the event – and the majority of it was positive – that I had been approachable and professional, demonstrated a mature and competent attitude and had built and maintained their confidence in my ability to do the job well.

I was asked to make a list of what I had learnt doing the event. The list included:

- keeping everyone who needs to know the plans updated on an ongoing basis.
- I worked with many more departments than I expected to – even housekeeping for tablecloths!
- keeping the spreadsheet updated was really important – and we're going to use the headings etc for the next event and keep it saved where everyone who needs to see it can do. I will also adapt it to be more like a GANTT chart with timelines and deadlines on it.
- be aware that changes might be agreed by other staff members that I need to be told about – this could be done if other people added to the spreadsheet too.
- it's important to remember that the clear up after the event needs to be planned and agreed too – to avoid the chaos that we had at the end of the event.
- it can take longer to clear up than to set up!
- it's important to work professionally and positively with the external businesses – especially if we want them to continue working with us in the future – and for them to be impressed by us and promote our business with their customers / clients.
- I was disappointed that I sent out the PDF to the externals before confirming it was ok with the internal team leader, but I am happy that she was impressed by my work and I think we can work well together again.
- I will start to build a database of business details and contacts to refer to in the future.

Identify which standards you have covered in this reflective account and explain how.

- IT – using packages and systems relevant to the organisation: I used a variety of software including Word, Excel and the company CRM system. I also regularly send e-mails, write reports and develop planning documents (e.g. table plan, data bases).
- Record and document production – produce accurate records and documents, make recommendations for improvements, maintaining records and files using Microsoft Office programmes and internal CRM systems.
- Decision making – exercise proactivity by using my own initiative, making decisions related to working with customers and planning events, ability to deal with challenges in a mature way, maintaining a professional approach and representing the company in an appropriate manner.
- Interpersonal skills – building and maintaining positive relationships with internal and external staff, building professional relationships with colleagues, customers and stakeholders.
- Communications – demonstrates good communication skills, using the most appropriate channels. Choosing the most appropriate communication method and adapting my communication methods and approaches when required, e.g. with colleagues, customers and stakeholders.
- Quality – completes tasks to a high standard, apply myself to continuously improve my own work, evaluating my work, approach and standards of work, whilst also making suggestions for improvement.
- Planning and organisation – I took responsibility for initiating and completing tasks, managing my time effectively and prioritise effectively to meet deadlines. Manage the expectations of others; colleagues, customers and stakeholders, manages resources; equipment and facilities, including arranging the layout of the room and allocating space to businesses. Took responsibility for the logistics of the event.
- Project management – planned required resources to successfully deliver the project, undertook the project as required.
- Professionalism – behaving professionally with colleagues and stakeholders involved in the wedding fair.
- Personal qualities – showed exemplary qualities including reliability, self-motivation, being pro-active and having a positive attitude towards barriers and overcoming obstacles.
- Managing performance – taking responsibility for my own work, accepting feedback in a positive and mature way, knowing when to ask questions and keeping my manager informed of project progress.
- Adaptability – dealing with the changing priorities of the project, and adapting my approach and the overall event when needed.
- Responsibility – taking responsibility for the success and performance of the project, having a positive attitude towards ensuring project success, handling customer requests appropriately.

Apprentice name:	Apprentice 'C'	**Date:**	19/03/2020
Apprentice signature:	Apprentice 'C'		
Employer name:	C Oxley	**Date:**	19/03/2020
Employer signature	C. Oxley		

Employer statement record

Apprentice name:	Apprentice 'C'
Statement provided by:	Claire Oxley (Conference and Events Team Leader)
Standard:	Business Administrator Level 3.
Location:	Holiday Inn, New Town.

Briefly describe the relationship between the person providing the statement and the apprentice.
I am the conference and events team leader at the hotel, and needed admin support for a project relating to a forthcoming wedding fair. The office manager offered me the help of Apprentice 'C' for this – I had not worked with her before but I am aware that she has worked in the company for around 6 months.

Modules covered in this record

Module title	Code	Tick (if covered)
The organisation	**O**	
Value of your skills	**VS**	
Stakeholders	**S**	✓
Relevant regulation	**RR**	
Policies	**Po**	
External environment factors	**E**	
IT	**IT**	✓
Record and document production	**RDP**	✓
Interpersonal skills	**IS**	✓
Communications	**C**	✓
Quality	**Q**	✓
Professionalism	**Pr**	✓
Personal qualities	**PQ**	✓
Managing performance	**MP**	✓
Adaptability	**A**	✓
Responsibility	**R**	✓

Description of the apprentice's activity – please provide as much detail as possible on the apprentice's performance and the knowledge, skills and behaviours demonstrated. You should include who was present, what you observed/what you are evaluating, and what the apprentice did. Use the key from the table above to mark, in the right hand column, where you feel your report covers each Learning Area. The Independent Training Provider should be able to help you with this if you are not sure.	Indicate Learning Area covered
Apprentice C completed a project for me relating to planning and managing a wedding fair.	
Overall, her work on the project was very good. She worked well on her own initiative, but knew when she needed to ask for guidance and clarification, and did so effectively. I gave her an overview of the project and work that had been completed to date, and guidance regarding what I needed her to do. She was proactive, and I particularly liked the recording system she used to document her progress on the work. She identified the businesses she was planning to contact and justified why she had chosen them.	PQ IT Po
She used the company template effectively to e-mail the relevant people, adapting it appropriately to suit the context.	Po, RDP
She was professional and communicated well, and was aware of the positive impression the company wanted and expected her to make on the external stakeholders.	C, Pr, PQ
She managed difficult situations well; she showed good negotiation skills and used common sense when needed. She met the expectations of the project and task well, reflecting on her performance and making suggestions for improvement.	C, PQ, R
I was also impressed with her use of IT; she used appropriate systems well and worked on her own initiative – developing use of an Excel spreadsheet, saving it in a shared area for ease of access and suggesting the development and use of a database for future projects.	IT, C, Po
In the planning stages, she worked on her own initiative, kept in close contact with the relevant stakeholders and built very positive working relationships with them. She showed respect and was reliable – her approach was something that many of the staff involved in the project commented on, specifically being professional, having a positive and mature attitude and adapting her work when needed. When changes came about, she responded to them appropriately and professionally, demonstrating high personal standards and taking the initiative when needed.	S, C, Pr R, IS
Apprentice C is very well presented, demonstrates a respectful attitude and works with integrity.	MP, PQ, Pr, C
When we discussed the weaknesses in the work, she was very open to feedback and demonstrated a mature attitude towards reviewing mistakes made. I had asked her to run the final room layout past me before making it available to others, and she did not remember to do this. She was most apologetic about forgetting this, and was keen to see how the error could be 'fixed'. I am confident that she would not make this mistake again! We also identified an oversight on both of our parts; this being not carefully planning the event clear up at the end. I should have checked that this had been considered and planned for, but I think it was good for her to see how all professionals can make mistakes – it's more about how they are handled in a positive manner and how we learn from them that is important.	PQ MP, IS Pr,, Q, C, PQ, MP, A, R
I would have no hesitation in asking her to complete projects and work for me in the future.	

Person providing the statement:	C Oxley	**Date:**	22/03/2020
Signature:	Ms. C Oxley		
Apprentice name:	Apprentice 'C'	**Date:**	22/03/2020
Apprentice Signature:	Apprentice 'C'		

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