

**Level 5 Learning and Development
Consultant/Business Partner v1.0**

Innovate Awarding Assessment Specification



Contents

Innovate Awarding	04
The Apprenticeship Standard and Assessment Plan	09
Assessment Journey	10
The Apprentice	11
Off-the-Job Training	12
Gateway	13
End-Point Assessment	17
Grading	22
Annex 1 - Assessment Plan and Occupational Standard	24
Annex 2 - Additional Information	25

Innovate Awarding

Meet our Managing Director



Welcome to the Level 5 Learning and Development Consultant Business Partner Apprenticeship. Our Innovate Awarding EPA Journeys are designed to ensure the employer, provider, assessor and apprentice have the appropriate support and guidance to allow successful completion of an apprenticeship, providing further confidence and assurance having chosen us as an End-Point Assessment Organisation (EPAO).

We are an Ofqual approved End-Point Assessment Organisation (EPAO), experienced in operating within a regulated market. Driven by the employers we work in partnership with, we deliver End-Point Assessment (EPA) in the Health, Care, Education, Leadership, Management, Leisure, Customer Service, Creative, Hospitality, Retail, Transport and Logistics sectors.

Delivering an apprenticeship is an extremely rewarding role. We recognise the need for a clear specification, resources and support, so more valuable time can be spent delivering to an apprentice.

At Innovate Awarding we stand by our 'no surprises' approach to assessment, making an apprenticeship journey as simple as possible, ensuring the best chance of success for every apprentice who undertakes EPA with us.

Charlotte Bosworth



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We recognise the need for a clear specification, resources and support.

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About Innovate Awarding

We are an EPAO approved by the Education and Skills Funding Agency (ESFA) with a collaborative approach to doing business. We work with providers to deliver fit for purpose EPA, providing assessments for a wide range of apprenticeship Standards, certifying thousands of apprentices, continuing to learn and improve with each experience.

We have experienced and responsive teams to ensure the EPA experience is smooth and efficient, working closely with our provider partners ensuring a 'no surprises' approach to EPA for all apprentices.

Please see our website for the range of Standards we are approved to deliver:

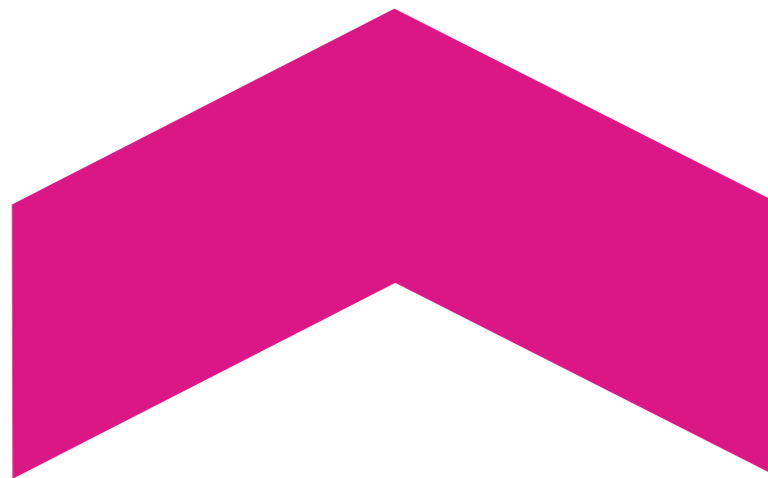
<https://innovateawarding.org/end-point-assessment/apprenticeship-standards/>



Our EPA Journeys

We have created four bespoke EPA Journeys tailored to the individual needs of the employer, provider, assessor and apprentice to enable a cross functional approach to EPA.

The Level 5 Learning and Development Consultant Business Partner EPA Journeys are available to download on epaPRO.



The Apprenticeship Standard and Assessment Plan

An Apprenticeship Standard details the knowledge, skills and behaviours (KSBs) required to be occupationally competent:

- **Knowledge** - the information, technical detail, and 'know-how' that someone needs to have and understand to successfully carry out the duties. Some knowledge will be occupation-specific, whereas some may be more generic.
- **Skills** - the practical application of knowledge needed to successfully undertake the duties. They are learnt through on and/or off-the-job training or experience.
- **Behaviours** - mindsets, attitudes or approaches needed for competence. Whilst these can be innate or instinctive, they can also be learnt. Behaviours tend to be very transferable. They may be more similar across occupations than knowledge and skills. For example, team worker, adaptable and professional.

Apprenticeships are an invaluable tool for upskilling in areas that matter most to employers. They are a highly effective route to recruit and train future talent, address skills shortages and develop careers across core parts of the business.

The Level 5 Learning and Development Consultant Business Partner apprenticeship has been developed by employers working in the sector detailing the knowledge, skills and behaviours required to be occupationally competent and outlining the training and assessment journey for an apprentice.

The apprentice will spend a minimum of 12 months on-programme, working towards the Level 5 Learning and Development Consultant Business Partner Standard, combining practical training in a job with study. The extent of the on-programme time should be decided for each apprentice based on their prior learning, skills and experience. If employers are using this Standard for an existing employee, it is important to be aware that the role must represent new learning. Providers should support employers with this.

It is vital the apprentice is prepared and fully ready before they commence their EPA period, which is detailed in the Assessment Plan.

The EPA period will last six months, consisting of:

- Work based project with Professional Discussion
- Presentation and Q&A based on Learning Journal

Assessment Journey

On Programme Learning



01

The minimum on programme duration for the Level 5 Learning and Development Consultant Business Partner Standard is 12 months. During this time the apprentice will develop their knowledge, skills and behaviours for the Level 5 Learning and Development Consultant Business Partner Standard.

Planning Meeting



03

The planning meeting will take place remotely and will last around 30 minutes. The employer and an Innovate Awarding representative will be present.

Presentation /Q&A based on the Learning Journal



05

This assessment method has two components:

1. A 25 minute presentation that uses evidence from the apprentice's Learning Journal to demonstrate their knowledge, skills and behaviours in relation to new and emerging trends and developments in the sector, their learning and development specialism(s), their leadership skills and the impact they have made on the business.
2. A 35 minute question and answer session in which the Innovate Awarding Assessor will ask further questions based on the apprentice's Learning Journal.

Gateway



02

To reach Gateway the employer will need to be satisfied that the apprentice is consistently working at, or above, the occupational competence of a Level 5 Learning and Development Consultant Business Partner. At Gateway the apprentice will submit a Learning Journal and a Project Proposal. At Gateway the apprentice must have achieved Level 2 English and Maths.

Work-Based Project with Professional Discussion



04

This assessment method has two components:

1. The apprentice will complete a project post Gateway that requires them to analyse, research, consult, plan, implement and evaluate a learning and development solution to a real business problem.
2. A 75 minute professional discussion based on the project

Grading and Certification



06

The assessments will be graded as Distinction/ Pass/Fail. Apprentices need to achieve a Distinction in both Assessments to be awarded an overall Distinction grade. The last step along the journey is the receipt of the certificate which will be sent to the employer by the ESFA.

The Apprentice

Learning and development consultant business partner is accountable for ensuring Learning and Development contributes to, and influences, improved performance in the workplace at an individual, team and organisation level.

They also have the commercial responsibility to align learning needs with the strategic ambitions and objectives of the business. They are agents for change, influencing key stakeholders, making decisions and recommendations on what the business can or should do in a Learning and development context.

They may be involved in influencing organisations to develop strategies to improve performance around sustainability or the embedding of approaches to help the UK reach net carbon zero emissions by 2050. They are also likely to lead on any Learning and development -related elements of business projects. The learning and development consultant business partner will often have expertise and competence in a specific field whether it be technical, vocational, or behavioural.

They link the work they do to the context and strategic priorities of the business and measure the outcomes and impact of any learning interventions, to demonstrate a return on investment and expectation. The role can be a generalist learning and development or more specialist, where the focus and in-depth expertise is in a specific area such as organisation development, digital and blended learning, resourcing, or talent management. Whichever the area of focus, the role requires a good grounding across all areas of Learning and development and is business and future focused.

The learning and development consultant business partner role exists within a range of organisations including private, public and third sector. Typically, the individual works alongside colleagues who specialise in human resources (i.e., employee relations, reward, recruitment), often supported by a learning and development administrator and / or learning and development practitioner. They report to a senior learning and development manager, Head of department or Director. In larger organisations, they may be one of a team supporting the business and may have responsibility for managing people and a budget.

Off-the-Job Training

Off-the-job training is a statutory requirement for an English apprenticeship. It is training, which is received by the apprentice during the apprentice's normal working hours, for the purpose of achieving the knowledge, skills and behaviours of the approved apprenticeship the learner is completing.

It is an important aspect of apprenticeship training, as it gives the learner time to properly develop knowledge and skills from the programme. At the same time, it can develop a deeper understanding of the wider business, giving a learner insight into the supply chain or different departments.

Off-the-job training allows the learner to take full advantage of the programme, improving the return on investment in training costs for the employer. A developed and upskilled apprentice will lead to an increase in productivity, a clear benefit to the business.

Examples of off-the-job training include:

- Learning new skills at work through shadowing other members of the team, where this activity has been agreed and documented as part of the agreed training plan
- In-house training programmes relevant to the apprenticeship
- Coaching sessions
- Attendance at workshops, training days and webinars relevant to the apprenticeship
- Completion of online learning
- Self-study that includes reading or watching videos
- Training in new working practices or new equipment
- Role-playing or simulation exercises
- Industry visits/conferences relevant to apprenticeships
- Writing assessments, assignments and completing projects or activities
- Practical training or training in the workplace relevant to the apprenticeship

The minimum volume of off-the-job training is six hours per week, irrespective of the hours worked by the apprentice.

Gateway



Gateway is the entry point to EPA, and it is vital that all parties understand its importance. It is the point at which the apprentice has completed their learning, met the requirements of the Level 5 Learning and Development Consultant Business Partner Apprenticeship Standard, and the provider and employer will have reviewed the apprentice's knowledge, skills and behaviours to confirm they are satisfied that the apprentice is competent and ready to enter their EPA.

Employers are ultimately responsible for deciding when their apprentice is competent as a Learning and Development Consultant Business Partner and ready to enter EPA. This decision should be taken after conversation with the provider and apprentice. It is vital this decision is based on each individual apprentice's readiness and not because they have reached the end of the initially agreed training period.

✦ Pre-Gateway Checks

Knowing when an apprentice is Gateway-ready is much more than simply checking the apprentice has completed their learning and obtained all the mandatory requirements outlined in the Level 5 Learning and Development Consultant Business Partner Assessment Plan. Although this is important, it is about the provider, apprentice and employer being convinced that the apprentice is at the level of competence set out in the Standard and that they are prepared for EPA, so they can claim that competency.

To pass through Gateway, the apprentice must have been training for a minimum of 12 months. They must also have:

- Achieved Level 2 English and Maths
- Satisfied their employer that they are consistently working at, or above, the occupational competence of the Level 5 Learning and Development Consultant Business Partner
- Compiled, and be ready to submit, a learning journal
- Completed and be ready to submit a project plan
- A signed declaration
- Declared any reasonable adjustments and special considerations

Readiness for Gateway includes confirming that the apprentice's portfolio meets the requirements of the knowledge, skills and behaviours set out within the Level 5 Learning and Development Consultant Business Partner Standard. This will be confirmed at Gateway and documented on epaPRO. This notifies us that the apprentice is ready for their assessment and the EPA planning meeting will be organised.

✦ What happens during Gateway?

During the first two weeks of Gateway we will agree the project's subject, title and scope, ensuring there is sufficient scope to meet the KSBs mapped to Assessment Method 1, enabling you to stand the best chance of achievement. The Project Proposal must scope out the work-based project and should include a summary of the stages to be covered by the work-based project and an overview of the tasks as well as the specific responsibilities and duties assigned and to be undertaken by the apprentice.

✦ Assessment Booking

Applications for any reasonable adjustments and/or special considerations should be submitted prior to Gateway, to allow time to review the request before the planning meeting.

The Innovate Awarding Assessor will/ Providers can book a planning meeting on epaPRO once Gateway documents have been reviewed and approved by us.

The purpose of the meeting is to allocate an Innovate Awarding Assessor, discuss assessment dates, confirm assessment timings, assessment requirements and assessment preparation. During the meeting we will discuss what happens if assessments are cancelled/rescheduled and how this could impact the EPA period, as well as providing information on certification and appeals.

The Level 5 Learning and Development Consultant Business Partner Standard will have a 30 minute planning meeting which will book assessment timeslots for the:

- Work based project with Professional Discussion
- Presentation and Q&A based on Learning Journal

After the planning meeting, the apprentice will receive an email confirming everything discussed in the meeting and a calendar invite for all booked assessments. The apprentice will then prepare for EPA.



✦ Learning journal Guidance

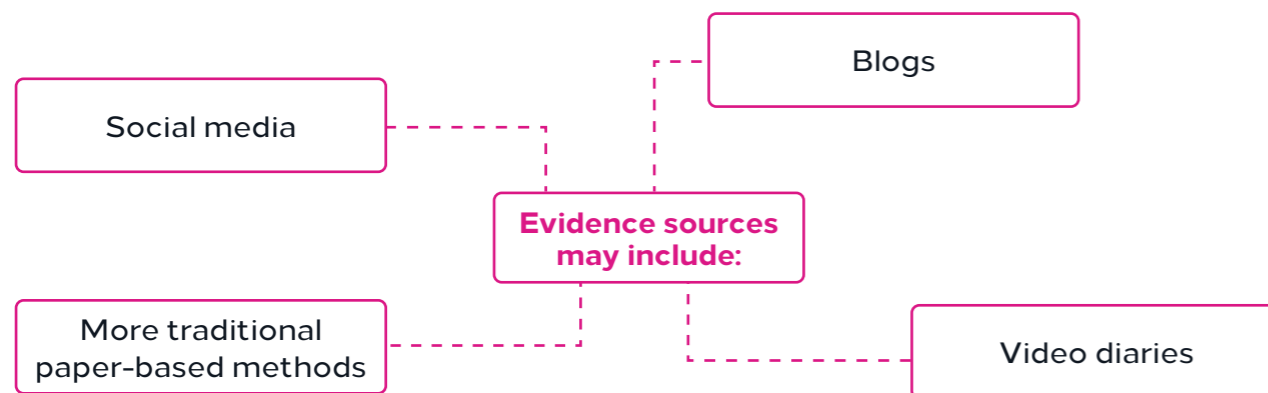
The employer will ensure the apprentice has compiled a learning journal during the on-programme period of the apprenticeship, which will be submitted at Gateway. It underpins the presentation and Q&A but will not be assessed by us.

We will review the learning journal in preparation for the presentation prior to Gateway. Feedback is not required, although generally if Gateway is rejected due to the learning journal being inadequate, a courtesy email will be sent with an explanation, including the rejection reason on epaPRO.

Learning journal content and format are typically Word documents, presentations, video or audio recordings. The provider will upload the learning journal to epaPRO at Gateway, either by inserting a link to a SharePoint or including a zip file.

Learning journal requirements:

- The apprentice must compile a learning journal during the on-programme period of the apprenticeship
- It must contain evidence related to the KSBs that will be assessed by the presentation and Q&A
- Evidence may be used to demonstrate more than one KSB; a qualitative as opposed to a quantitative approach is suggested



End-Point Assessment

✦ Assessment Methods

Assessment Method 1:

Work based project with Professional Discussion

This method has two components. First the Apprentice completes a Work based Project before progressing onto a Professional discussion (75 minutes) based on the project. The Work based Project report should be submitted to Innovate Awarding for remote marking a minimum of one month prior to end of the six month EPA period. This will allow grading and preparation ahead of the Professional Discussion.

Assessment Method 1 Component 1:

Work based Project

The Work Based Project is a substantive piece of work, requiring the apprentice to demonstrate their L&D consultancy skills in relation to a real business-related problem or objective – it will demonstrate real activity done in the role (i.e. not simulated), and should demonstrate the aspects of the standard mapped to EPA 1. It should describe what the apprentice did, how they did it and the recommendations and outcomes that resulted from the project.

The apprentice should agree the project plan with their employer to ensure it meets their requirements. Project guidance/criteria from Innovate Awarding will be used to support this process. The employer should agree the plan to be submitted at Gateway for approval. Innovate Awarding should notify the apprentice of its approval/rejection with seven days of receipt to avoid delays.

The Apprentice will be given up to 5 months after the gateway to complete the project, for submission to Innovate Awarding.

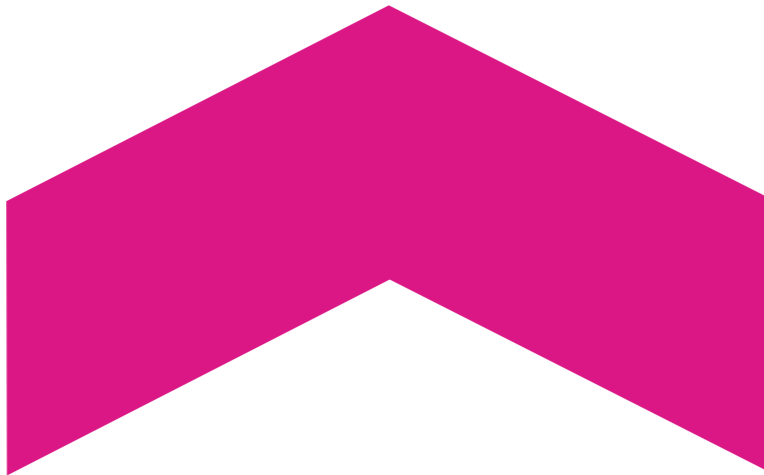
The final Project should take the form of a formal business report of 5000 words (+/- 10%). The report should describe how the project was delivered, focusing on the actions and decisions taken, critically analysing the reasons for those, and the outcomes achieved. The project will require significant research both inside the organisation and into the learning and development profession to demonstrate breadth of understanding, and the application of this research to support the project decisions and outcomes.

The project will cover how the apprentice dealt with a significant issue facing the business/sector describing how they:

- Analysed the problem. This should include demonstrating significant consulting with relevant business stakeholders to understand the requirements of the business/team.
- Conducted relevant background research e.g. business requirements/implications, L&D/ industry developments, and any regulatory requirements. This should include relevant data analysis and budgetary/resource considerations.
- Researched and developed options for potential solutions, giving reasoned explanations as to their inclusion or rejection
- Collaborated and consulted with colleagues and the business in the development of the agreed solution
- Developed the Project plan with relevant solutions looking for impacted populations and implementing change management actions as appropriate.
- Implemented the solution
- Evaluated the solution against the agreed criteria from stakeholders
- Evaluated for lessons learnt and factors to improve upon for next time.

The project should include evidence of how the project was delivered and the outcomes achieved e.g. relevant emails; evidence of return on investment/ expectations; and/or client feedback.

Employers and training providers will use project guidance/criteria from Innovate Awarding to support the apprentice to develop a project plan. The project should be based on a real business requirement (i.e. not simulated) to also best test competence.



Assessment Method 1 Component 2: Professional Discussion

The 75-minute (+/- 10%) Professional Discussion will be based on the Work based Project undertaken by the apprentice.

The Innovate Awarding Assessor must ask the apprentice 10-12 open questions; follow up further probing type questions from the Innovate Awarding Assessor are allowed to seek clarification.

The questions should seek to assess the KSBs mapped to this method that are not evidenced through the project, and/or depth of understanding to assess performance against the distinction criteria.

Apprentices may refer to their project report, and evidence contained with the project report annexes, when answering the assessor's questions.



Assessment Method 2:

Presentation/Q&A based on the Learning Journal

Innovate Awarding must schedule EPA 2 (and the Professional Discussion of EPA 1) to take place within 4 weeks of submission of the Work based Project Report and within the maximum six month EPA period, giving an apprentice a minimum of three weeks' prior notice of the time, date and venue.

The focus of the presentation is not to demonstrate further reflection on their journey through the apprenticeship, but to provide an opportunity to demonstrate the attained skills, knowledge and behaviours, using examples from the journal that best evidence these, which might include lessons learned.

The Presentation must focus on how they *demonstrate the skills*, knowledge and behaviours within the standard mapped to this assessment method (see annex A), giving competency-based examples on *how* they have demonstrated these.

The presentation should provide an example from the Learning journal that best demonstrates each of the key themes, (New and emerging trends and developments in the L&D sector, L&D Specialisms and their Business Impact, and Leadership).

It is left to the apprentice to use their creativity to select the most appropriate delivery method/s for their presentation. The Innovate Awarding Assessor will not only assess the content of the presentation but also the delivery of this – looking at their delivery style, clarity and communication skills (as required in the standard).

The presentation will be followed by a 35 minute (+/- 10%) Q&A session with the independent assessor. The independent assessor must ask the apprentice 5-7 open questions; follow up questions by the Innovate Awarding Assessor are allowed in order to seek clarification.



Grading

The innovate Awarding Assessor will make the judgment on the grade to be awarded to the apprentice, whether Distinction, Pass or Fail based on the grading criteria detailed below.

The apprenticeship for L&D Consultant/Business Partner has **four** possible **overall grades**: Distinction, Merit, Pass or Fail.

However, the Innovate Awarding Assessor must individually grade each assessment method only against the criteria for a Distinction, Pass or Fail, according to the grading criteria.

No restrictions on grading apply where apprentices re-sit/re-take an assessment method – see re-sit/retake section below.

In the event of an appeal against the grade awarded, Innovate Awarding will carry out a further review of the evidence to confirm or modify the grade in line with their standard procedures.

The Innovate Awarding Assessor will make the judgment on the grade to be assessment method against the criteria for Distinction, Pass or Fail. These individual grades are then combined as described below to reach the overall apprenticeship grade of fail, pass, merit or distinction.

An apprenticeship pass represents full competence against the standard i.e. fully competent in the role as described in the standard.

A premium has been placed on the Work-based Project with Professional Discussion; meaning Distinction must be achieved here for Merit or Distinction to be applied overall.

The grade of Distinction is to recognise apprentices who are outstanding L&D Consultants/BPs who consistently demonstrate that they have excelled in the application of the knowledge, skills and behaviours stated in the apprenticeship standards, to the benefit of their organisation, having achieved a Distinction grade in both of the assessment methods.

In addition, the grade of Merit will be awarded to recognise apprentices who achieved a Distinction in their Work-based Project with Professional Discussion, and a pass in their Presentation/Q&A based on the Learning journal.

The final apprenticeship grade is based on performance across both the assessment methods. The Innovate Awarding Assessor must combine the grades of the two assessment methods to determine the EPA grade. The overall grade is based on the following principles:

- **To achieve Pass grade overall** the apprentice must achieve a pass in both of the end-point assessment methods.
- **To achieve Merit grade overall** the apprentice must achieve a distinction in the Work Based Project with Professional Discussion and pass in the Presentation/Q&A based on the Learning Journal.
- **To achieve Distinction grade overall** the apprentice must achieve a Distinction in both of the end-point assessment methods

Project with Professional Discussion	Presentation/Q&A based on Learning Journal	Overall Grading
Distinction	Distinction	Distinction
Distinction	Pass	Merit
Pass	Distinction	Pass
Pass	Pass	Pass
Any grade	Fail	Fail
Fail	Any grade	Fail



Annex 1

✦ Assessment Plan and Occupational Standard

The Level 5 Learning & Development Consultant/Business Partner Occupational Standard and the latest version of the Assessment Plan can be accessed by following this link:

<https://www.instituteforapprenticeships.org/apprenticeship-standards/learning-and-development-consultant-business-partner-v1-0>

**Level 5 Learning & Development Consultant/Business Partner ST0563
Version 1.0
Sector: Business and administration
EQA Organisation: Ofqual**



Annex 2 Additional Information

✦ Results and Certifications

All final assessment component results are published on epaPRO within **seven working days** of the assessment taking place.

We will submit a certificate claim with the ESFA within 15 working days after the final result has been uploaded to epaPRO. The ESFA will send the certificate directly to the employer.

For replacement certificates a request must be emailed to epa@innovateawarding.org. Within two days of receiving the request, a replacement certificate will be requested from the ESFA.

✦ Re-sits and Re-takes

Apprentices that fail one or more EPA method will have the opportunity to re-sit/re-take. Re-sits/retakes are not to be offered to apprentices wishing to move up to a higher apprentice grade. A re-sit does not require further learning, whereas a re-take does. Re-sits/re-takes can take the apprenticeship up to 2 months over the initial six months allocated for the EPA. When receiving notification of a fail, apprentices will receive feedback from the EPAO.

Re-sits of both methods of the EPA are permissible based on the following criteria:

- EPA 1 - Work based Project with Professional Discussion: If the apprentice fails the project report with professional discussion they are permitted to

formally re-submit the report and resit the professional discussion – the number of resubmissions/re-sits permitted is up to the employer. The resubmission of the project to Innovate Awarding and subsequent professional discussion must happen within two months of receiving notification of the initial fail grade. To avoid unnecessary delays/disruption apprentices are permitted to progress onto EPA 2 if they fail EPA 1 overall following the Professional discussion.

- Presentation/Q&A based on the Learning Journal: If the apprentice fails the Presentation and Q&A they are permitted to re-sit/re-take this, the number of re-sits/re-takes permitted is up to the employer. This must be re-arranged by Innovate Awarding and held within one month of the original Presentation.
- Innovate Awarding must ensure that apprentices receive different questions for the professional discussion when taking a re-sit/re-take.
- All re-sit/re-takes will also be graded Distinction/Pass/Fail (so no limit to grades on re-sit/retakes) and combined with the grades for the other assessment methods to determine the EPA grade as per grading procedure described above. If an apprentice fails the re-sit/re-take they will be required to re-take the EPA in full after a period of further learning.
- In all cases the apprentice's employer will need to agree that a re-sit or re-take is an appropriate course of action. Apprentices should have a supportive action plan to prepare for the re-sit/re-take.

✦ Reasonable Adjustments, Special Considerations and Appeals

Information on reasonable adjustments, special considerations and the appeals process can be accessed by using this link:

<https://innovateawarding.org/end-point-assessment/apprentice-information>

**Level 5 Learning and Development
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Innovate Awarding Assessment
Specification V3**

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