

CIPD



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

Portfolio Template

Issue 2

This template is designed to give guidance on the type of materials that should be included in your portfolio of evidence and to allow you to map the evidence you have included against the grading descriptors (GDs) and knowledge, skill and behaviour components of the standard (KSBs).

- Your portfolio should contain at least one piece of evidence for each of the requirements detailed in this document.
- You should write in the first person to explain your contribution to the evidence you provide.
- You should write no more than 200-300 words for your role summary or for each portfolio content for question area area. We advise you keep this succinct and in bullet points to clearly highlight where grading descriptors are evidenced.
- Your portfolio should be uploaded to SmartEPA (SEPA) as a zip file.*
- Your portfolio should not exceed 1 gigabyte.

Your portfolio should be named using the following naming convention:
ULN00000000_FirstName_SecondName_DDMMYYYY_SPP_Portfolio

The date should be the date of submission.

You should upload no more than 25 documents/individual pieces of evidence.

Apprentice Name	
ULN	
Employer	
Training Provider	
Option (select one)	HR OD L&D

I confirm that the information presented in this portfolio of evidence is my own work produced during my time on programme.

Signature	
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* If you are linking to an external ePortfolio, you should upload a document with the link and necessary log-in details for your assessor. You will still need to complete this template to explain how your evidence maps to the grading descriptors.

Role summary

Please provide an overview of your organisation and your role within it. This is valuable context for your assessor in understanding the work you do, your organisation and the sector you work in.

Organisation	
Website	
Sector	
Number of employees (FTE)	
People function FTE	
Brief description of the organisation, its mission, vision, purpose and customers	

Current role title	
Team/department	
Number of people in your team/department	
Number of direct reports	
Number of reports in total	
Brief description of your role, primary responsibilities and main customers	
Previous roles held (during this apprenticeship)	

Core portfolio content

Portfolio content for question area 1			
Evidence of a people* approach you have designed and/or implemented as well as demonstratable value you have added . (This could be a set of practices or interventions or policy.)			
Evidence of the value that this approach has created for stakeholders or your organisation.			
Evidence of specific theories, concepts or models of human behaviour or organisational culture that informed your people approach.			
OD option only: Additional portfolio content is recommended (see the OD option section later).			
Grading descriptors	PDP1 PDD1 PDP2	KSBs	K1 K2 S1 S2 B8
File names			
<i>What are the files you are submitting as evidence for these grading descriptors?</i>			
Description			
<i>Briefly describe your evidence and how this relates to the grading descriptors.</i>			

* HR option - focused on wellbeing/engagement or employee relations or performance management or reward

* L&D option - focused on L&D

* OD option - focused on organisation development and/or design

Portfolio content for question area 2			
A budget you have created and managed for an area of work.			
Grading descriptors	PDP3	KSBs	K3 S3
File names			
What are the files you are submitting as evidence for these grading descriptors?			
Description			
Briefly describe your evidence and how this relates to the grading descriptors.			

Portfolio content for question area 3			
Annotated excerpts from your organisation's people strategy/people plan that highlight how your work contributes to this.			
Grading descriptors	PDP4 PDD4	KSBs	S4
File names			
<i>What are the files you are submitting as evidence for these grading descriptors?</i>			
Description			
<i>Briefly describe your evidence and how this relates to the grading descriptors.</i>			

Portfolio content for question area 4

Evidence of technology and/or social media used in your organisation to support people practice.

Grading descriptors

PDP5

KSBs

K5
S6

File names

What are the files you are submitting as evidence for these grading descriptors?

Description

Briefly describe your evidence and how this relates to the grading descriptors.

Portfolio content for question area 5

A people plan or set of practices you have developed and implemented that contributes to workforce planning.

Grading descriptors	PDP6 PDD6	KSBs	K7 S8
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File names

What are the files you are submitting as evidence for these grading descriptors?

Description

Briefly describe your evidence and how this relates to the grading descriptors.

Portfolio content for question area 6			
Evidence of a programme/initiative involving coaching and mentoring that you have implemented and evaluated.			
Evidence of how the above programme/initiative embedded the value of learning and promoted a coaching and mentoring culture.			
Grading descriptors	PDP7 PDD7 (L&D PDP16)	KSBs	K9 S10 (K17) (S20)
File names			
<i>What are the files you are submitting as evidence for these grading descriptors?</i>			
Description			
<i>Briefly describe your evidence and how this relates to the grading descriptors.</i>			

Portfolio content for question area 7

Evidence of a people change project/programme you have planned and implemented, covering project and risk management and resourcing.

Evidence of the outcomes delivered for the above people change project/programme.

Evidence of how you communicated with and engaged stakeholders for the above people change project/programme showing how people were given a 'voice'.

A stakeholder map for the above people change project/programme.

Grading descriptors	PDP8 PDP9 PDP10 PDP11	KSBs	K12 S12 B1 B2 B3	K11 S7ii S13 S14ii S15
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File names

What are the files you are submitting as evidence for these grading descriptors?

Description

Briefly describe your evidence and how this relates to the grading descriptors.

Portfolio content for question area 10/11*			
<p>A CPD record/log describing specific professional development experiences and/or activities over the last 24 months, what you learned and how this informed your practice.</p> <p>You should aim to include three experiences.</p>			
Grading descriptors	PDP12	KSBs	B5
File names			
<p><i>What are the files you are submitting as evidence for these grading descriptors?</i></p>			
Description			
<p><i>Briefly describe your evidence and how this relates to the grading descriptors.</i></p>			

*Depending on the option chosen.

OD option portfolio content

Portfolio content for question area 1*			
Evidence of a specific OD model or theory that informed the OD approach covered in Core Portfolio Content 1.			
Grading descriptors	PDP13 PDD13	KSBs	K13 S16
File names			
What are the files you are submitting as evidence for these grading descriptors?			
Description			
Briefly describe your evidence and how this relates to the grading descriptors.			

*Evidence for PDP13 will be assessed alongside PDP1, PDD1 & PDP2 based on the people approach you have designed and/or implemented.

Portfolio content for question area 8			
Evidence of organisation design work you have undertaken (for example, redesign or restructure of roles in a team/department or an area of work) that shows when you have applied design principles and/or an OD model/theory.			
Grading descriptors	PDP14	KSBs	K14 S17
File names			
<i>What are the files you are submitting as evidence for these grading descriptors?</i>			
Description			
<i>Briefly describe your evidence and how this relates to the grading descriptors.</i>			

Portfolio content for question area 9			
Evidence of when you have used a systems thinking approach to OD work.*			
Grading descriptors	PDP15	KSBs	K16 S19
File names			
What are the files you are submitting as evidence for these grading descriptors?			
Description			
Briefly describe your evidence and how this relates to the grading descriptors.			

* This could be the same example as you have used for portfolio content for question area 1.

L&D option portfolio content

Portfolio content for question area 8			
Evidence of when and how you have applied your knowledge of adult learning and motivation to a learning programme/approach in your organisation.			
Grading descriptors	PDP17	KSBs	K18 S21
File names			
<i>What are the files you are submitting as evidence for these grading descriptors?</i>			
Description			
<i>Briefly describe your evidence and how this relates to the grading descriptors.</i>			

Portfolio content for question area 9			
An L&D strategy or plan you have created using learning design principles or theories.*			
Grading descriptors	PDP18 PDD18	KSBs	K19 S23
File names			
<i>What are the files you are submitting as evidence for these grading descriptors?</i>			
Description			
<i>Briefly describe your evidence and how this relates to the grading descriptors.</i>			

* This could be the same example as you have used for portfolio content for question area 1 or 6.

Portfolio content for question area 10

Evidence of using and applying a complex facilitation technique (for example, using stories, pattern intelligence, appreciative inquiry, action learning or process facilitation) to enable a group to sense-make, plan or evaluate and find a new way forward.

Grading descriptors

PDP19
PDD19

KSBs

K20
S22

File names

What are the files you are submitting as evidence for these grading descriptors?

Description

Briefly describe your evidence and how this relates to the grading descriptors.

HR option portfolio content

Portfolio content for question area 8*			
Evidence of a wellbeing and/or engagement initiative you have selected, implemented and evaluated.*			
Grading descriptors	PDP20 PDD20	KSBs	K21 S24
File names			
What are the files you are submitting as evidence for these grading descriptors?			
Description			
Briefly describe your evidence and how this relates to the grading descriptors.			

*The number of the question area to which the HR Option grading descriptors relates may change depending on which descriptor(s) is assessed alongside PDP1, PDD1 and PDP2 in Question area 1.

* This could be the same example as you have used for portfolio content for question area 1.

Portfolio content for question area 8 or 9*			
Evidence of a reward and/or benefit solution or approach within your organisation.*			
Grading descriptors	PDP21	KSBs	K22 S25
File names			
What are the files you are submitting as evidence for these grading descriptors?			
Description			
Briefly describe your evidence and how this relates to the grading descriptor.			

* The number of the question area to which the HR Option grading descriptors relates may change depending on which descriptor(s) is assessed alongside PDP1, PDD1 and PDP2 in Question area 1.

* This could be the same example as you have used for portfolio content for question area 1.

Portfolio content for question area 9 or 10*			
Evidence of when/how you have interpreted and applied specific legislation and case law and assessed its impact.*			
Grading descriptors	PDP22 PDD22	KSBs	K23 S26
File names			
What are the files you are submitting as evidence for these grading descriptors?			
Description			
Briefly describe your evidence and how this relates to the grading descriptors.			

* The number of the question area to which the HR Option grading descriptors relates may change depending on which descriptor(s) is assessed alongside PDP1, PDD1 and PDP2 in Question area 1.

* This could be the same example as you have used for portfolio content for question area 1.

Portfolio content for question area 10*			
Evidence of a performance management approach or process in your organisation.*			
Grading descriptors	PDP23	KSBs	K24 S27
File names			
What are the files you are submitting as evidence for these grading descriptors?			
Description			
Briefly describe your evidence and how this relates to the grading descriptors.			

* The number of the question area to which the HR Option grading descriptors relates may change depending on which descriptor(s) is assessed alongside PDP1, PDD1 and PDP2 in Question area 1.

* This could be the same example as you have used for portfolio content for question area 1.

Grading descriptors

The following grading descriptors are assessed in this assessment method.

Core grading descriptors

Code	Grade	KSBs	Grading descriptor
PDP1	Pass	K1 S1 B8	Describes people policies, processes and approaches they have designed and/or implemented, explaining how they are related to the employee lifecycle and culture in their organisation as well as relevant regulation and law and evaluating how they have created value for the organisation and its people.
PDD1	Distinction	K1 S1	Evaluates how their own organisation provides people practices across a range of specialisms and how they integrate these to create a holistic people offering.
PDP2	Pass	K2 S2	Justifies their use of organisational culture, theories, concepts and models of human behaviour when identifying and recognising the interventions needed in their organisation to create the desired culture and behaviours.
PDP3	Pass	K3 S3	Justifies the process taken when they created and managed budgets and strategy, making commercial decisions where they needed to balance competing demands and assess financial and organisational data.
PDP4	Pass	S4	Analyses their contribution to their organisation's people strategy, evidencing how this aligns to the wider organisational strategy and takes into account the wider business context.
PDD4	Distinction	S4	Evaluates and critically analyses their own organisation's strategy and how external influences impact on their organisation's performance and potential future trends in their sector and beyond.
PDP5	Pass	K5 S6	Identifies how technology is used to support people practice in their organisation, including social media, identifying benefits and risks and evaluating impact on ways of working.
PDP6	Pass	K7 S8	Justifies the approach taken to developing and implementing a people plan/integrated people practice with reference to the elements that contribute to strategic workforce planning.
PDD6	Distinction	K7 S8	Demonstrates how their approach in developing and implementing a people plan makes a positive contribution to wider workforce planning.
PDP7	Pass	K9 S10	Details how they implemented a programme or initiative involving coaching and mentoring, evaluating the impact on colleagues and the organisation.
PDD7	Distinction	S10	Evaluates and critically analyses the organisation's approach to coaching and mentoring.
PDP8	Pass	K12 S12 B3	Evaluates how their use of worker voice tools and associated outputs enables people to have a meaningful voice and feel valued and explains why this is important.

PDP9	Pass	S14ii B1 B2	Justifies their use of negotiating and influencing techniques in the management of multiple stakeholders to build trust and enhance their organisation's brand reputation, challenging constructively when necessary.
PDP10	Pass	K11 S7ii S13	Evaluates a complex change management programme they have implemented, justifying the tools and project methodologies they have used to deliver outcomes and manage risks.
PDP11	Pass	S15	Presents complex information clearly and concisely, adopting channels tailored to segmented stakeholder groups including across organisational boundaries and cultures.
PDP12	Pass	B5	Demonstrates evidence of a commitment to CPD and that incorporates sharing insights, using a reflective mind-set to support their personal development.

OD grading descriptors

Code	Grade	KSBs	Grading descriptor
PDP13	Pass	K13 K15 S16 S18	Critically evaluates how and why they chose a particular organisational development and design model or theory over others when implementing interventions and analyses the considerations that need to be taken into account to ensure cultural development.
PDD13	Distinction	K13 S16	Leads the implementation of different organisational development models and analyses how that impacted on the culture of the organisation.
PDP14	Pass	K14 S17	Justifies how they select, evaluate and apply an organisational design model or theory appropriate to their organisation.
PDP15	Pass	K16 S19	Evaluates how they have used a systems thinking approach to organisational development and its impact.

L&D grading descriptors

Code	Grade	KSBs	Grading descriptor
PDP16	Pass	K17 S20	Critically evaluates an intervention they have implemented that helped embed the value of learning in the organisation and promote a coaching and mentoring culture.
PDP17	Pass	K18 S21	Critically analyses the effectiveness of their use of new/updated principles for adult learning/motivation in changing an existing programme or implementing a new programme, and integrating these into their organisation's learning approach.
PDP18	Pass	K19 S23	Justifies how they create a successful organisational learning strategy through their selection and application of design principles.
PDD18	Distinction	K19 S23	Critically evaluates how they implement organisational learning principles to meet the future capability needs of the organisation.
PDP19	Pass	K20 S22	Critically analyses when they have used a complex facilitation technique giving the rationale for using that technique over others.
PDD19	Distinction	K20 S22	Evaluates complex facilitation techniques and details the considerations that need to be taken into account when employing these techniques.

HR grading descriptors

Code	Grade	KSBs	Grading descriptor
PDP20	Pass	K21 S24	Critically evaluates when they have selected and applied a wellbeing and/or engagement initiative, giving the rationale for their decisions.
PDD20	Distinction	S24	Critically evaluates the strategies they used to integrate employee wellbeing and engagement.
PDP21	Pass	K22 S25	Critically evaluates a reward and/or benefit solution/approach within their organisation, explaining why the approach was taken, how it was implemented and how it meets the organisation's current and future needs.
PDP22	Pass	K23 S26	Critically evaluates when they have recognised, interpreted and applied both specific legislation and current case law and the impact of this on the organisation and HR strategy.
PDD22	Distinction	K23 S26	Evaluates how they assess the organisation impact of employment legal decisions in shaping employee relations strategy, policy and practice.
PDP23	Pass	K24 S27	Critically evaluates the selection and application of a performance management process in their organisation and how this process aligns with organisation strategy and plans. Utilises this data to drive improvement.