

Issue 2



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

Portfolio Template

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.

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| **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.

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| **Signature** |  |

\* 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.

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

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| **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

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| **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** | | | |
| *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 – 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

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| **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.* | | | |

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| **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** | | | |
| *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.* | | | |

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| **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.* | | | |

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| **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 |
| **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.* | | | |

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| **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** | | | |
| *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.* | | | |

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| **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 |
| **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.* | | | | |

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| **Portfolio content for question area 10/11\*** | | | |
| 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.  You should aim to include three experiences. | | | |
| **Grading descriptors** | PDP12 | **KSBs** | B5 |
| **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.* | | | |

\*Depending on the option chosen.

# OD option portfolio content

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| **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.

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| **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** | | | |
| *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.* | | | |

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| **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

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| **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** | | | |
| *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.* | | | |

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| **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** | | | |
| *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 or 6.

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| **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

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| **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.

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| **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.

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| **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.

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| **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

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| --- | --- | --- | --- |
| **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. |

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| 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

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| **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

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| **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

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| **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. |