

# CHARTERED MANAGER DEGREE APPRENTICESHIP HANDBOOK

An overview and guide for Apprentices  
and Employers  
June 2023 | v0.1

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## LIST OF CONTENTS

### INTRODUCTION

Occupational profile	3
Qualification Details	3

### WHAT TO EXPECT

The Apprenticeship Journey - including choosing your programme and University through to your options after end point assessment	4
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### END POINT ASSESSMENT

What is an endpoint assessment?	6
Things you need to know about the Portfolio of Evidence assessment method	6
Things you need to know about the Project Showcase assessment method	7
Things you need to know about the Interview assessment method	8
How are the results calculated?	9

### FURTHER INFORMATION

Information regarding resits and/or retakes	10
Information regarding appeals	10
Information regarding reasonable adjustment and special consideration requests	10
Information regarding recognition of prior learning	11

### APPENDICES

1. Glossary of key terms, words, phrases	12
2. Which KSBs are assessed within each assessment method	14
3. Copy of the assessment criteria from annex 3 of the IfATE CMDA assessment plan	19
4. List of CMI command verbs	25
5. Version history	26

# INTRODUCTION

## Occupational Profile

Welcome to the CMI Qualification Specification document for the L6 Chartered Manager Degree Occupational Standard. This document has been developed to help you, as a potential apprentice or employer of an apprentice, to choose your endpoint assessment organisation and/or to answer any questions you may have regarding undertaking an apprenticeship.

The Chartered Manager Degree Apprenticeship was developed in 2015 by the Leadership and Management Employer Trailblazer Group and the Institute for Apprenticeships and Technical Education (IfATE) to address a skills gap within the workplace. The apprenticeship programme is aimed at professional managers who take lead responsibility for people, projects, operations and/or services to deliver long term organisational success and is applicable to professional managers from all sectors - the private, public or third sector - and all sizes of organisation.

It will typically take 3 to 4 years to complete, although the exact duration will be dependent on the previous experience of each individual and/or the degree programme of your chosen University.

## Qualification Details

IfATE Occupational Standard	Apprenticeship Qualification Title	Ofqual Qualification Reference Number
ST Code: ST0272/v1.1  Date Approved For Delivery: 8th October 2015  Latest version: v1.1 (dated 6/2/23)  Typical duration to Gateway (excluding EPA period): 48 months  Maximum funding: £22000	CMI Level 6 Chartered Manager Degree Apprenticeship End Point Assessment	610/0203/3

The qualification reference number is the number allocated to CMI by Ofqual, as the External Assurance Regulator, on approval of our recognition to undertake endpoint assessments for this occupational standard.

## WHAT TO EXPECT

### The Apprenticeship Journey

Your end to end apprenticeship journey is likely to be split into the following 5 stages:

<b>Choosing Your Programme and University</b>	<p>See the <a href="#">UCAS Apprenticeship</a> page for more information and/or to find possible apprenticeship opportunities within your area.</p> <p>Apprentices need to be currently working in the role of a professional manager (see notes above regarding the occupational standard).</p> <p>Apprentices need to live and/or work in England to be eligible for their employer to utilise their levy funding.</p>
<b>Completing The On-Programme Assignments, Modules, and Activities</b>	<p>This is when apprentices develop the knowledge, skills, and behaviours (KSBs) of the occupational standard. It is also where apprentices complete their leadership and management degree, as well as their English and mathematics level 2, if required.</p> <p>Towards the end of their on-programme activities, apprentices will need to have completed their portfolio of evidence and have undertaken a work-based project.</p> <p>The typical duration for this stage of the journey is 36 to 48 months.</p>
<b>Passing Through Gateway</b>	<p>Gateway is the point of the journey where apprentices move from learning to demonstrating the knowledge, skills, and behaviours (KSBs) within the occupational standard.</p> <p>Before an apprentice is able to undertake their end point assessment (EPA), their employer must confirm that the apprentice is working at or above the level of the occupational standard and their training provider (University/HEI) has to confirm that the apprentice has achieved their degree plus has a level 2 qualification for English and mathematics.</p> <p>At Gateway, apprentices must submit their:</p> <ul style="list-style-type: none"> <li>• Portfolio of evidence</li> <li>• Work-based project report</li> </ul>
<b>Undertaking Your End Point Assessment (EPA)</b>	<p>End Point Assessment (EPA) is the final stage of the actual apprenticeship journey and is where the apprentice will be tested by an independent apprenticeship assessor to determine whether they are able to demonstrate the knowledge, skills, and behaviours within the occupational standard.</p> <p>EPA can only be triggered after 12 months of starting the apprenticeship, and for the L6 Chartered Management Degree Apprenticeship it requires the apprentice to have successfully completed a level 6 management degree.</p> <p>The assessment methods for the L6 Management Degree Apprenticeship are:</p> <ul style="list-style-type: none"> <li>- <b>Portfolio of Evidence = maximum 55 marks (55%)</b></li> <li>- <b>Work-Based Project Showcase and Presentation = maximum 35 marks (35%)</b></li> <li>- <b>Interview = maximum 10 marks (10%).</b></li> </ul> <p>Typical duration of end point assessment: 4 to 6 weeks culminating in a live assessment activity lasting no more than 2 hours.</p>

## Your Options after EPA

Ongoing personal and professional development is an essential skill and/or requirement of every manager and leader.

CMI, as a professional body, is committed to turning accidental managers into conscious leaders and supports its members in their ongoing continued professional development. CMI is the only chartered body that can award Chartered Manager and its Management Diagnostics provides a valuable self-assessment tool that enables its members to understand what good looks like and know how to develop the skills employers need now and in the future.

Other technical education options following end point assessment include completing another apprenticeship (either in management and leadership or your industry specialism), or considering a specialism higher technical qualification.

## END POINT ASSESSMENT

### What is an endpoint assessment and why is it needed?

End point assessment is the terminology used by IfATE to describe the period post-Gateway and put simply is what the apprentice needs to do at the end of their apprenticeship programme. Its aim is to test the apprentice's competence in the knowledge, skills and behaviours (KSBs) within the [L6 Chartered Management Degree Apprenticeship \(CMDA\)](#).

End point assessment usually requires the apprentice to complete a number of different activities, called assessment methods, and is carried out by an End Point Assessment Organisation, such as CMI, who are independent to the Training Provider (University) and Employer.

The end point assessment for the [L6 Chartered Management Degree Apprenticeship \(CMDA\)](#) occupational standard is synoptic (meaning that it has been designed to test all of the knowledge, skills and behaviours within IfATE's occupational standard ST0272 and seeks to discern the breadth and depth of topics/area covered in this standard.) It has 3 (three) assessment methods:

- **Portfolio of Evidence = maximum 55 marks (55%)**
- **Work-Based Project Showcase and Presentation = maximum 35 marks (35%)**
- **Interview = maximum 10 marks (10%)**

Apprentices need to note that before they are able to do their end point assessment, their chosen University or Higher Education Institution (Training Provider) has to confirm that all of the on-programme activities have been completed. This is done as part of their gateway requirements, and is also when they need to confirm that the apprentice completed a work-based project (either as part of the final dissertation for the degree or whilst on-programme) and that the degree has been awarded.

### Things to need to know about the assessment method - Portfolio of Evidence

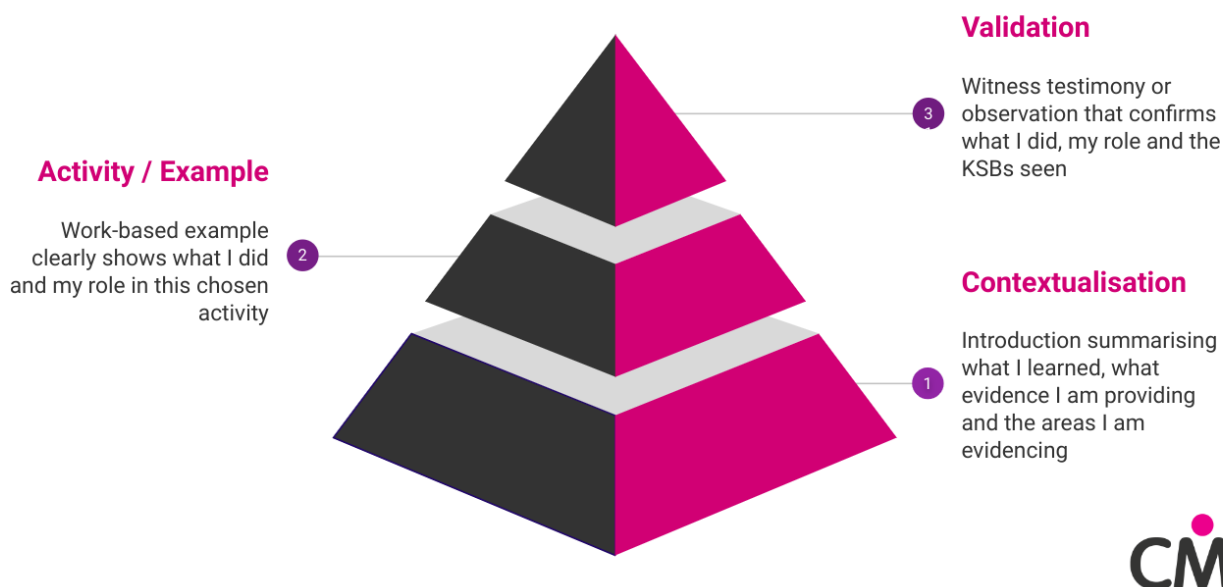
The maximum number of marks that can be awarded for this assessment method is 55, and it accounts for 55% of the overall grade. Apprentices do not get a grade for this individual assessment method as the marks awarded are carried forward and are used to determine their overall grade once the end point assessment has concluded.

It is a distinct assessment method and is typically used to benchmark the activities undertaken as part of the end point assessment. It requires apprentices to complete a portfolio of evidence whilst on-programme which is submitted as part of the Gateway requirements.

Please see below some useful hints and tips on gathering evidence for an end point assessment portfolio



The portfolio of evidence needs to cover all of the KSBs within the [L6 Chartered Management Degree Apprenticeship \(CMDA\)](#) occupational standard and should predominantly be real work-based examples that have been validated by a third-party, such as their line manager or using a witness testimony. The image below explains the importance of triangulating evidence used within a portfolio of evidence:



This is why CMI recommends that as an apprentice you:

- Take a qualitative, as opposed to a quantitative, approach when gathering evidence for your portfolio. Each piece of evidence needs to focus on your role and activities as a manager or leader, and will typically cover multiple KSBs.
- Showcase your 'best' work, including any key achievements whilst on-programme, and/or from within your day to day activities.
- Include a separate evidence locator document within your portfolio that clearly identifies which KSBs each piece of evidence is mapped to. *(NOTE: CMI has a template that they share with Universities, for apprentices to use as part of their prompting notes within the live assessment activity and to ensure all of the KSBs have been evidenced.)*

**Please be aware that CMI has chosen to use the guidance from within annex 3 of the assessment plan to determine which areas of the standard should be assessed within the portfolio of evidence. This is to reduce duplication of assessment and a list of the relevant areas and KSBs that are assessed within this assessment method can be found in appendix 2 of this document.**

### Things you need to know about the assessment method - Project Showcase, including report, presentation and question/answer session

The maximum number of marks that can be awarded for this assessment method is 35, and it accounts for 35% of the overall grade. Apprentices do not get a grade for this individual assessment method as the marks awarded are carried forward and will be used to determine their overall grade once the end point assessment has concluded.

Apprentices are required to complete a work based project, typically within the last 6-12 months of being on-programme. This typically is undertaken as part of their degree in the final year. The actual topic of this work-based project needs to be decided between the apprentice and their manager, with input and/or support from their University or HEI. It **MUST** be at a level appropriate to that of a professional manager and **MUST** relate to an actual business issue or need such as needing to lead on the implementation of a business improvement or change initiative.



This work-based project is then showcased at the end point assessment and requires the apprentice to write a report about their project that is submitted at gateway. Whilst there is no mandated word count for the work-based project report, CMI would typically expect that it would be no more than 4000 words (+/- 10%).

The apprentice's project report must be completed ahead of Gateway so it can be uploaded by the University and be reviewed by the CMI Independent Assessor (IAA) before the live assessment.

It does needs to summarise:

- The purpose of the chosen project activity (including its scope and/or business case)
- The planning activities that the apprentice undertook and led on, prior to the start of the project activity (such as benchmarking, product analysis, continuous improvement review, stakeholder analysis, risk analysis)
- The leadership and management activities undertaken by the apprentice during their project (including what they set out to achieve, how they planned it and what they did)
- Any barriers and/or obstacles the apprentice encountered during their project activity, and what they did to mitigate and/or solve these issues
- The leadership and management communications made by the apprentice to their internal and/or external stakeholders during their project activity
- The outcome(s) of their project, including whether the project achieved its outcomes, whether it was completed within the planned timescale, and the impact this project had on their organisation

**Please be aware that CMI has chosen to use the guidance from within annex 3 of the assessment plan to determine which areas of the standard should be assessed within the project showcase and the interview. This is to reduce duplication of assessment and a list of the relevant areas and KSBs that are assessed within this assessment method can be found in appendix 2 of this document.**

As part of the holistic project showcase, the apprentice also needs to deliver a 15-minute presentation and complete a 15-minute question and answer session as part of their live assessment activity.

- The presentation requires the apprentice to:
  - Focus on their management and leadership knowledge, skills and behaviours (as opposed to their technical/specialist expertise)
  - Demonstrate their relevant interpersonal and behavioural skills.
  - Summarise the objectives and outputs of their work based project activity, including what they set out to achieve, what they did, how they approached the work required, how they dealt with any issues.
- The interview will include a minimum of 3 core questions that also focus on the work-based project activity and can be used by the CMI Independent Assessor (IAA) to clarify any areas of the report/presentation and/or to stretch the apprentice to a higher grade.

## Things you need to know about the assessment method - Interview (maximum 10 marks and 10% of the overall grading result)

The maximum number of marks that can be awarded for this assessment method is 10, and it accounts for 10% of the overall grade. Apprentices do not get a grade for this individual assessment method as the marks awarded are carried forward and will be used to determine their overall grade once the end point assessment has concluded.

This final assessment method is used to address any areas from the assessment of the portfolio and the work-based project that the CMI Independent Assessor (IAA) feels need further clarification, as well as to stretch apprentices from a pass to a merit (or a merit to a distinction).

It requires the apprentice to complete a 30 to 45-minute competency based interview which consists of 6 core questions (chosen by the assessor from the CMI bank of questions) plus additional probing questions if required. As mentioned above, the questions asked during this assessment method are based on the CMI Independent Assessor's (IAA) findings from their assessment of the portfolio and project report.

CMI expects apprentices to have a good understanding of the evidence included within their portfolio and recommends that apprentices also have other examples that they could draw from within their day to day activities and workplace. *(Note: Examples used MUST come from the lifetime of the apprenticeship and from within*

*their employed workplace, meaning that apprentices are not allowed to use activities they completed prior to starting their apprenticeship and/or from other activities/roles such as volunteering.)*

The interview is open-book, meaning that the apprentice is encouraged to have access to their portfolio and/or work-based project report. Some pre-prepared notes are also allowed in order to support the apprentice in their answers but should only be used as a prompt and should not distract them from answering the questions being asked of them.

**Please be aware that CMI has chosen to use the guidance from within annex 3 of the assessment plan to determine which areas of the standard should be assessed within the project showcase and the interview. This is to reduce duplication of assessment and a list of the relevant areas and KSBs that are assessed within this assessment method can be found in appendix 2 of this document.**

## **How are the results calculated?**

The CMI Independent Assessor (IAA) will use the assessment criteria listed within annex 3 of the published assessment plan (or appendix 3 of this document) to base their assessment decision on the level of competence seen/heard across all of the assessment methods within the end point assessment.

They will then assign marks based on the following:

- The apprentice has not included evidence within their portfolio and/or mapping document. This will result in a REFERRAL grade following the EPA and require the apprentice to resubmit this evidence.
- The apprentice was not able to evidence or meet the relevant learning outcome at the level expected within the Standard
- The apprentice was only able to partially evidence or meet the learning outcome at the level expected within the Standard
- The apprentice was able to evidence and/or meet the learning outcome at the level expected within the Standard
- The apprentice's evidence or answer demonstrates breadth or depth. The apprentice is deemed to have partially exceeded the level expected for this learning outcome within the Standard
- The apprentice's evidence or answer demonstrates both breadth and depth. The apprentice is deemed to have exceeded the level expected for this learning outcome within the Standard

The marks obtained for each assessment method are then carried forward and once the end point assessment has concluded these marks are totalled. The cumulative score will then determine the apprentice's overall grade.

**REFERRED - if the overall score is between 0% and 49%**

**PASS - if the overall score is between 50% and 59%**

**MERIT - if the overall score is between 60% and 69%**

**DISTINCTION - if the overall score is between 70% and 100%**

Results are communicated via the CMI EPA Portal and to the Training Provider (University) within 15 working days of the live assessment activity. Apprentices will then be advised of their result by their Training Provider (University).

Where an apprentice has not met some of the criteria required within an assessment method this will initially be notified as a referral and CMI will send further information to the Training Provider (University) detailing the assessment method that needs to be resat/retaken and the relevant knowledge, skills and/or behaviours that were not met.

The apprentice will then have 10 working days to liaise with their employer and University and to choose if they want to resit and/or retake the assessment method(s) notified as REFERRED. *(Note: If an apprentice chooses to not resit/retake these referred assessment methods then their final grade will be reported as a FAIL.)*

## FURTHER INFORMATION

### Information Regarding Resits and Retakes

As mentioned above, where an apprentice has not successfully completed any of the criteria required within an assessment method this will initially be notified as a referral and CMI will send further information to the Training Provider (University) detailing the assessment method that needs to be resat/retaken.

The difference between a resit and a retake is that:

- A resit means that the apprentice did not quite meet the knowledge, skill and/or behaviour advised within the CMI feedback report. This typically means that the apprentice may need to find some additional evidence for their portfolio, and/or adjust their work-based project report/presentation before attending a further live assessment activity.
- A re-take means that there are significant gaps in the knowledge, skills and behaviours and it is recommended that the apprentice undertakes further learning before another assessment is taken.

Apprentices who achieve a pass grade cannot ask to re-sit/re-take their end point assessment simply to achieve a higher grade.

### Information Regarding Appeals

There may be occasions when CMI make end-point assessment decisions that apprentices find unclear, unfair or believe have caused disadvantage. If this is the case then they have the right to appeal their endpoint assessment grading decision.

Please note that an appeal:

- Can only be submitted once all methods of assessment have taken place and all marks and grades have been recorded and released correctly for each of the end-point assessment components and the overall grade awarded by CMI.
- Is only able to be submitted if the apprentice feels that they were either treated unfairly by CMI and/or the process has not been followed by CMI, which resulted in them being disadvantaged.
- Cannot be submitted to CMI if the apprentice has concerns about their Training Provider (University), to gain additional feedback from CMI regarding their overall assessment decision, or if the apprentice feels they did not achieve the result that they expected and want their assessment to be remarked.

For further information regarding submitting an appeal, please see the **CMI EPA Enquiries and Appeal Policy** which can be found on our website [here](#)

### Information Regarding Reasonable Adjustment Requests

End point assessment should be a fair assessment of an apprentice's knowledge, skills and behaviours, therefore in line with legal and regulatory requirements CMI has the right to make a reasonable adjustment and/or to allow a special consideration in relation to the end-point assessment for all apprenticeship standards that CMI is recognised to provide.

**Reasonable adjustments** are defined as any action that helps reduce the effect of a disability that places the apprentice at a substantial disadvantage in the assessment situation. They **MUST** be agreed before the assessment takes place to enable the apprentice to demonstrate their knowledge, skills and behaviours

**Special considerations** can be applied during the end point assessment period (or post assessment) if there is a reason the apprentice may have been disadvantaged during the assessment period by an event outside of their control. This also includes requests for any extension to end-point assessment deadlines where there are extenuating circumstances (such as apprentice redundancy)

Please note that reasonable adjustments and/or special considerations should not give the apprentice an unfair advantage, and that the apprentice's result must reflect their achievement in the assessment and not necessarily their potential ability.

For further information, please see the **CMI EPA Reasonable Adjustments and Special Considerations Policy** which can be found on our website [here](#)

### **Information Regarding Recognition of Prior Learning (RPL)**

There may be occasions where apprentices have been deemed to have Recognition of Prior Learning (RPL) by their Training Provider (University). Whilst this is likely to mean that the apprentice doesn't need to complete the relevant module(s) and/or assignment(s) on-programme, the apprentice will still need to provide evidence for all of the knowledge, skills and behaviours within their portfolio and demonstrate competence in all of the knowledge, skills and behaviours within the [L6 Chartered Management Degree Apprenticeship \(CMDA\)](#) occupational standard as part of the end point assessment.

## APPENDIX 1 - Glossary of Key Terms

Glossary of Key Words / Phrases Used Within Apprenticeships	Definition and/or Explanation
<b>Assessment Component</b>	The different activities that an apprentice has to complete for each assessment method. Typically these components are assessed holistically to determine one overall grading decision.
<b>Assessment Method</b>	The actual assessment activities that an apprentice needs to complete and pass as part of their endpoint assessment. Most of the newer assessment plans have 2-3 assessment methods.
<b>Assessment Plan</b>	The document that is published by IfATE (under Crown Copyright) that sets out what needs to be done when testing the competence of an apprentice for that particular standard.
<b>Distinct</b>	Recognisably different in nature from something else of a similar type. This phrase is often used to describe either the type of evidence that has been submitted within a portfolio, and/or the different assessment methods.
<b>End Point Assessment (EPA)</b>	Rigorous robust and independent assessment of an apprentice at the end of training to test that the apprentice can perform in the occupation they have been trained in and can demonstrate the knowledge, skills and behaviours (KSBs) set out in the occupational standard
<b>End-point assessment organisation (EPAO)</b>	An organisation approved to deliver end-point assessment for a particular apprenticeship standard; EPAOs must be on the register of end-point assessment organisations
<b>Education and Skills Funding Agency (ESFA)</b>	The Education and Skills Funding Agency is an executive agency of the government of the United Kingdom, sponsored by the Department for Education.
<b>Gateway</b>	The stage of the apprenticeship where it is agreed by the Employer, Training Provider and Apprentice that the Apprentice has the knowledge, skills and behaviours required in the Apprenticeship Standard and can prove this at EPA
<b>Grading Decision</b>	This is the final overall grade for an endpoint assessment. IAAs are required to check the overall grade within the assessment sheet before uploading it to Skilsure ready for Internal Quality Assurance/release of results to the TP/Apprentice.
<b>Holistic (or Synoptic) Assessment</b>	Terminology used to identify an assessment method or assessment activity which has a number of components that are assessed as one overall decision.
<b>CMI Independent Assessor (IAA)</b>	Terminology used by CMI. The assessor independent from the on-programme delivery of the Apprenticeship who assesses the competence of the apprentice during the endpoint assessment activities set out in the published Assessment Plan
<b>Interview</b>	IfATE assessment method - usually requires a number of competency based questions to be asked.
<b>Institute for Apprenticeships and Technical Education (IfATE)</b>	IfATE (sometimes referred to as 'The Institute') works with employers to develop, approve, review and revise apprenticeships and technical qualifications within England.
<b>Knowledge, skills and behaviours (KSBs)</b>	What is needed to competently undertake the duties required for an occupational Standard <b>Knowledge:</b> What the apprentice needs to know and/or understand to complete their apprenticeship successfully. The information, technical detail, and

	<p>'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.</p> <p><b>Skills:</b> What an apprentice needs to be able to do. The practical application of knowledge needed to successfully undertake the duties. They are learnt through training or experience.</p> <p><b>Behaviours:</b> Apprentices need to demonstrate how they have developed and exhibited the behaviours within the occupational standard within the workplace. Whilst they may be innate or intrinsic they can also be learned so are sometimes considered to be an additional subset of skills.</p>
<b>Live Assessment Activity (LAD)</b>	The point at which the live assessment methods are carried out in front of an Independent Apprenticeship Assessor, such as the interview and project presentation
<b>Occupational (Apprenticeship) Standard</b>	<p>Written and developed by the relevant employer trailblazer group(s) and include the specific Knowledge, Skills and Behaviours (KSBs) needed for specific occupations. The document acts as the basis for apprenticeship standards and T-levels, and aims to put employers in the driving seat for ensuring apprentices are learning skills that are relevant to the workplace.</p> <p>The newer standards also include the key duties expected of an apprentice by the time they complete their programme, as well as the occupational profile, expected duration, and grading boundary.</p>
<b>Occupational Profile</b>	This is an overview of the occupation and describes the sector or industries the occupation is typically found in; the broad purpose of the occupation; and what an employee in the occupation would typically do.
<b>On-programme activities</b>	Activities carried out during the time of the apprenticeship supported by the training provider and employer through training and resources
<b>Presentation</b>	IfATE assessment method - presented as part of the live assessment. Typically the presentation is on a set topic or based on a project/activity.
<b>Portfolio of Evidence</b>	Is a collection of pieces of evidence, gathered together on-programme, that is used as the underpinning basis of an end-point assessment method.
<b>Question &amp; Answer Session</b>	IfATE assessment method - typically used following a presentation to confirm the assessors understanding of certain KSBs and/or to stretch to a distinction.
<b>Referral/Referred</b>	CMI terminology used to indicate that an apprentice has not met all of the KSBs within an assessment method. CMI will need to advise if the referral requires a resit or retake.
<b>Resit</b>	IfATE terminology used to indicate that an apprentice did not meet all of the KSBs for a particular assessment method or KSB group. Typically a resit will not require the apprentice to undertake further learning so can be completed within a few weeks of the referral notification.
<b>Result</b>	Final grading decision after it has been through our internal quality assurance process. This result is advised to the TP and Apprentice plus sent to ESFA/Ofqual as part of our reporting requirements.
<b>Retake</b>	IfATE terminology used to indicate that an apprentice did not meet a number of the KSBs within an assessment method. Typically a retake requires the apprentice to undertake further learning before undertaking their endpoint assessment again.
<b>Witness Testimony</b>	Third party validation that confirms what the apprentice did, how they did it , and what KSBs they consider were demonstrated during the activity.



## APPENDIX 2 - What KSBs are assessed within each assessment method?

In order to ensure valid and reliable assessment, please be aware that CMI has chosen to use the guidance from within annex 3 of the assessment plan to determine which areas of the standard should be assessed within the project showcase and the interview. This is to reduce duplication of assessment and a list of the relevant areas and KSBs that are assessed within this assessment method can be found in appendix 1 of this document.

Area of the standard	Knowledge, Skills, Behaviours within the Standard. <i>Learning outcome that explains what the apprentice is required to evidence:</i>	Is this KSB assessed within the Portfolio of Evidence Assessment Method?	Is this KSB assessed within the Project Showcase Assessment Method?	Is this KSB assessed within the Interview Assessment Method?
<b>Organisational Performance – delivering a long-term purpose</b>				
<b>Operational Strategy - Knowledge</b>	1.1 How to develop and implement organisational strategy and plans, including approaches to resource and supply chain management, workforce development, sustainability, taking and managing risk, monitoring and evaluation, and quality assurance.	Yes	Yes	
	1.2 How to manage change in the organisation.	Yes	Yes	
<b>Operational Strategy - Skills</b>	1.3 Support the development of organisational strategies and plans.	Yes	Yes	
	1.4 Develop and deliver operational plans; set targets and key performance indicators, manage resources, and monitor and measure outcomes to establish operational effectiveness, efficiencies and excellence.	Yes	Yes	
	1.5 Produce reports that clearly present information and data, using a range of interpretation and analytical processes.	Yes	Yes	
	1.6 Gain wide support to deliver successful outcomes.	Yes	Yes	
<b>Project Management - Knowledge</b>	2.1 How a project moves through planning, design, development, deployment and evaluation.	Yes	Yes	
	2.2 Risk management models and reporting, risk benefit analysis and health and safety implications.	Yes	Yes	
<b>Project Management - Skills</b>	2.3 Plan, organise and manage resources in order to achieve organisational goals.	Yes	Yes	
	2.4 Identify key outcomes, develop and implement plans and monitor progress, and provide reports as required.	Yes	Yes	

	2.5 Proactively identify risk and create plans for their mitigation.	Yes	Yes	
	2.6 Initiate, lead and drive change within the organisation, identifying barriers/ challenges and how to overcome them.	Yes	Yes	
	2.7 Use widely recognised project management tools.	Yes	Yes	
<b>Business Finance - Knowledge</b>	3.1 Financial strategies, including budgets, financial management and accounting, and how to provide financial reports.	Yes		Yes
	3.2 Approaches to procurement and contracting, and legal requirements.	Yes		Yes
	3.3 Commercial context in an organisational setting and how this changes over time.	Yes		Yes
<b>Business Finance - Skills</b>	3.4 Manage budgets, control expenditure and produce financial reports.	Yes		Yes
<b>Sales and Marketing - Knowledge</b>	4.1 How to create marketing and sales strategies.	Yes		Yes
	4.2 How to segment and target relevant markets and customers (global and local), analysis of opportunities and ways to market.	Yes		Yes
	4.3 The need for innovation in product and service design.	Yes		Yes
<b>Sales and Marketing - Skills</b>	4.4 Use customer insight and analysis of data to determine and drive customer service outcomes and improve customer relationships.	Yes		Yes
	4.5 Use creative approaches to developing solutions to meet customer need	Yes		Yes
<b>Digital Business and New Technologies - Knowledge</b>	5.1 Approaches to innovation and digital technologies and their impact on organisations, and how their application can be used for organisational improvement and development.	Yes		Yes
	5.2 Innovation and digital technology's impact on data and knowledge management for analysing business decision-making.	Yes		Yes
<b>Digital Business and New Technologies - Skills</b>	5.3 Identify service/ organisational improvements and opportunities for innovation and growth, using qualitative and quantitative analysis of information and data and benchmarking against others.	Yes		Yes



Interpersonal Excellence – leading people and developing collaborative relationships				
Communication - Knowledge	6.1 Different forms of communication (written, verbal non-verbal, digital) and how to apply them.	Yes	Yes	
	6.2 How to maintain personal presence and present to large groups	Yes	Yes	
	6.3 Interpersonal skills awareness including effective listening, influencing techniques, negotiating and persuasion.	Yes	Yes	
Communication - Skills	6.4 Communicate clearly, effectively and regularly using oral, written and digital channels and platforms.	Yes	Yes	
	6.5 Use active listening and open questioning to structure conversations and discussions, and able to challenge when appropriate.	Yes	Yes	
	6.6 Manage and chair meetings and clearly present actions and outcomes	Yes	Yes	
	6.7 Apply influencing and persuading skills, to the dynamics and politics of personal interactions	Yes	Yes	
Leading People - Knowledge	7.1 Different inclusive leadership styles and models, how to develop teams and support people using coaching and mentoring approaches	Yes		Yes
	7.2 Organisational culture and diversity management	Yes		Yes
Leading People - Skills	7.3 Articulate organisational purpose and values.	Yes		Yes
	7.4 Support the creation of an inclusive, high performance work culture.	Yes		Yes
	7.5 Enable others to achieve by developing and supporting them through coaching and mentoring.	Yes		Yes
Managing People - Knowledge	8.1 How to recruit, manage and develop people, using inclusive talent management approaches.	Yes		Yes
	8.2 How to use HR systems and processes to ensure legal requirements, health and safety, and wellbeing needs	Yes		Yes
	8.3 How to set goals and manage performance	Yes		Yes

<b>Managing People - Skills</b>	8.4 Build teams, empower and motivate others to improve performance or achieve outcomes.	<b>Yes</b>		<b>Yes</b>
	8.5 Delegate to others, provide clear guidance and monitor progress.	<b>Yes</b>		<b>Yes</b>
	8.6 Set goals and accountabilities.	<b>Yes</b>		<b>Yes</b>
<b>Developing Collaborative Relationships - Knowledge</b>	9.1 Approaches to stakeholder, customer and supplier management, developing engagement, facilitating cross functional working and negotiation.	<b>Yes</b>		<b>Yes</b>
	9.2 How to shape common purpose, as well as approaches to conflict management and dispute resolution.	<b>Yes</b>		<b>Yes</b>
<b>Developing Collaborative Relationships - Skills</b>	9.3 Build rapport and trust, develop networks and maintain relationships with people from a range of cultures, backgrounds and levels.	<b>Yes</b>		<b>Yes</b>
	9.4 Contribute within a team environment.	<b>Yes</b>		<b>Yes</b>
	9.5 Effectively influence and negotiate, being able to have challenging conversations and give constructive feedback.	<b>Yes</b>		<b>Yes</b>
	9.6 Work collaboratively with internal and external customers and suppliers.	<b>Yes</b>		<b>Yes</b>
<b>Personal Effectiveness – managing self</b>				
<b>Awareness of Self and Others - Knowledge</b>	10.1 How to be self-aware and recognise different learning styles.	<b>Yes</b>		<b>Yes</b>
	10.2 How to use emotional and social intelligence, and active listening and open questioning to work effectively with others.	<b>Yes</b>		<b>Yes</b>
<b>Awareness of Self and Others - Skills</b>	10.3 Reflect on own performance, identifying and acting on learning and development needs.	<b>Yes</b>		<b>Yes</b>
	10.4 Understand impact on others.	<b>Yes</b>		<b>Yes</b>
	10.5 Manage stress and personal well-being, being confident in knowing core values and drivers.	<b>Yes</b>		<b>Yes</b>
<b>Management of Self - Knowledge</b>	11.1 How to manage time, set goals, prioritise activities and undertake forward planning in a business environment with a focus on outcomes.	<b>Yes</b>		<b>Yes</b>

<b>Management of Self - Skills</b>	11.2 Create personal development plan, and use widely recognised tools and techniques to ensure the management of time and pressure effectively, and prioritisation and strategic alignment of activities.	<b>Yes</b>		<b>Yes</b>
<b>Decision Making - Knowledge</b>	12.1 How to undertake research, data analysis, problem solving and decision-making techniques	<b>Yes</b>	<b>Yes</b>	
	12.2 The values, ethics and governance of your organisation.	<b>Yes</b>	<b>Yes</b>	
<b>Decision Making - Skills</b>	12.3 Use evidence-based tools and ethical approaches to undertake problem solving and critical analysis, synthesis and evaluation to support decision making	<b>Yes</b>	<b>Yes</b>	
<b>Behaviours required (developed and exhibited in the workplace)</b>				
<b>Takes Responsibility</b>	<p>Drive to achieve in all aspects of work</p> <p>Demonstrates resilience and determination when managing difficult situations</p> <p>Seeks new opportunities underpinned by commercial acumen and sound judgement.</p>	<b>Yes</b>		<b>Yes</b>
<b>Inclusive</b>	<p>Open, approachable, authentic, and able to build trust with others</p> <p>Seeks the views of others and values diversity internally and externally.</p>	<b>Yes</b>		<b>Yes</b>
<b>Agile</b>	<p>Flexible to the needs of the organisation • Is creative, innovative and enterprising when seeking solutions to business needs</p> <p>Positive and adaptable, responding well to feedback and need for change</p> <p>Open to new ways of working and new management theories.</p>	<b>Yes</b>		<b>Yes</b>
<b>Professionalism</b>	<p>Sets an example, and is ethical, fair, consistent and impartial</p> <p>Operates within organisational values and adheres to the requirements of relevant professional bodies.</p>	<b>Yes</b>		<b>Yes</b>

## APPENDIX 3 - Copy assessment criteria (from annex 3 of the IfATE Assessment Plan) used by the CMI Independent Assessor (IAA) to determine the marks for each assessment method

The CMI Independent Assessor (IAA) will use the assessment criteria listed within annex 3 of the published assessment plan to base their assessment decision on the level of competence seen/heard across all of the assessment methods within the end point assessment.

Area of the standard	Knowledge, Skills, Behaviours within the Standard. <i>Learning outcome that explains what the apprentice is required to evidence:</i>	Assessment criteria <i>Used as guidance by the apprentice and the assessor in understanding what needs to be evidenced, and/or the breadth of the evidence presented. The apprentice can:</i>
<b>Organisational Performance – delivering a long-term purpose</b>		
<b>Operational Strategy - Knowledge</b>  <i>(The apprentice needs to know and/or understand)</i>	1.1 How to develop and implement organisational strategy and plans, including approaches to resource and supply chain management, workforce development, sustainability, taking and managing risk, monitoring and evaluation, and quality assurance.	1.1.1 Evaluate theories of organisational strategies and review own organisations strategy in the context of these 1.1.2 Analyse own organisations strategy for resource and supply chain management 1.1.3 Analyse own organisations strategy for workforce development 1.1.4 Interpret key principles of sustainability within own organisation 1.1.5 Evaluate risk management models and review own organisations approach to the identification and monitoring of risk 1.1.6 Evaluate quality assurance models in the context of own organisation
	1.2 How to manage change in the organisation.	1.2.1 Critically evaluate change management models 1.2.2 Apply relevant model(s) to effectively manage substantial change in a select area of own organisation
<b>Operational Strategy - Skills</b>  <i>(The apprentice needs to be able to)</i>	1.3 Support the development of organisational strategies and plans.	1.3.1 Review own organisations strategies and plans and support further development of these
	1.4 Develop and deliver operational plans; set targets and key performance indicators, manage resources, and monitor and measure outcomes to establish operational effectiveness, efficiencies and excellence.	1.4.1 Develop operational plan to include realistic, measurable targets and key performance indicators 1.4.2 Demonstrate effective delivery of operational plan 1.4.3 Identify and manage appropriate resources to deliver plan 1.4.4 Accurately monitor and measure outcomes and evaluate results
	1.5 Produce reports that clearly present information and data, using a range of interpretation and analytical processes.	1.5.1 Construct a range of detailed management reports and analyse and interpret these
	1.6 Gain wide support to deliver successful outcomes.	1.6.1 Deliver successful outcomes demonstrating the effective use of wide support from a range of sources.
<b>Project Management - Knowledge</b>	2.1 How a project moves through planning, design, development, deployment and evaluation.	2.1.1 Analyse the key stages of a project and demonstrate the application of these

<i>(The apprentice needs to know and/or understand)</i>	2.2 Risk management models and reporting, risk benefit analysis and health and safety implications.	2.2.1 Evaluate risk management models and risk versus benefit 2.2.2 Present methods of reporting and monitoring risk, including health and safety, and the mitigation of identified risks
<b>Project Management - Skills</b>  <i>(The apprentice needs to be able to)</i>	2.3 Plan, organise and manage resources in order to achieve organisational goals.	2.3.1 Exhibit the effective planning, organisation, and management of identified resources, demonstrating how this contributes to the achievement of project goals 2.4.1 Identify key project outcomes, developing and implementing plans to ensure that these are achieved
	2.4 Identify key outcomes, develop and implement plans and monitor progress, and provide reports as required.	2.4.2 Monitor progress towards the achievement of project outcomes and produce reports that clearly demonstrate this
	2.5 Proactively identify risk and create plans for their mitigation.	2.5.1 Select and apply a risk management model to project, identifying and monitoring risks and actions to mitigate of these
	2.6 Initiate, lead and drive change within the organisation, identifying barriers/ challenges and how to overcome them.	2.6.1 Initiate, lead and drive change within a specific area of own organisation, identifying barriers/ challenges and presenting strategies to overcome these
	2.7 Use widely recognised project management tools.	2.7.1 Demonstrate the successful use of project management tools.
<b>Business Finance - Knowledge</b>  <i>(The apprentice needs to know and/or understand)</i>	3.1 Financial strategies, including budgets, financial management and accounting, and how to provide financial reports.	3.1.1 Evaluate the importance of strategic financial management in relation to the organisational strategy 3.1.2 Assess the key elements of financial planning and review 3.1.3 Create and analyse financial reports
	3.2 Approaches to procurement and contracting, and legal requirements.	3.2.1 Evaluate the use of procurement and contracting and analyse their use within the context of own organisation 3.2.3 Assess the legal requirements around procurement and contracting and how to comply with these
	3.3 Commercial context in an organisational setting and how this changes over time.	3.3.1 Assess the commercial context that own organisation operates within
<b>Business Finance - Skills</b>  <i>(The apprentice needs to be able to)</i>	3.4 Manage budgets, control expenditure and produce financial reports.	3.4.1 Identify how a budget can be produced taking into account financial constraints and achievement of targets, legal requirements and accounting conventions 3.4.2 Demonstrate competent management of a budget ensuring control over expenditure in accordance with targets 3.4.2 Access financial data, assess its validity and produce clear financial reports that analyse data and draw conclusions.
<b>Sales and Marketing - Knowledge</b>	4.1 How to create marketing and sales strategies.	4.1.1 Evaluate sales and marketing theories to inform strategy 4.1.2 Assess methods for setting sales and marketing objectives 4.1.3 Explain methods for applying and monitoring the implementation of a sales and marketing plan

	4.2 How to segment and target relevant markets and customers (global and local), analysis of opportunities and ways to market.	4.2.1 Critically evaluate types of market segmentation and apply to own organisations customer base 4.2.2 Analyse segments in relation to own organisation and propose a strategy to assist targeting
	4.3 The need for innovation in product and service design.	4.3.1 Explain the importance of innovation in product and design 4.3.2 Analyse approaches to innovation employed by own organisation making recommendations as appropriate
<b>Sales and Marketing - Skills</b>  <i>(The apprentice needs to be able to)</i>	4.4 Use customer insight and analysis of data to determine and drive customer service outcomes and improve customer relationships.	4.4.1 Analyse sources of information for customer insight and data 4.4.2 Demonstrate use of customer insight and data to determine and drive customer service outcomes and improve customer relationships
	4.5 Use creative approaches to developing solutions to meet customer need	4.5.1 Demonstrate use of creative approaches in developing a range of solutions to meet customer needs and review the effectiveness of these
<b>Digital Business and New Technologies - Knowledge</b>  <i>(The apprentice needs to know and/or understand)</i>	5.1 Approaches to innovation and digital technologies and their impact on organisations, and how their application can be used for organisational improvement and development.	5.1.1 Critically evaluate the impact of innovation and digital technologies on organisations 5.1.2 Evaluate the use of these for organisational development 5.1.3 Review the use of innovation and digital technologies in own organisation and make recommendations for improvement
	5.2 Innovation and digital technology's impact on data and knowledge management for analysing business decision-making.	5.2.1 Analyse the impact of innovation and digital technologies on data and knowledge management 5.2.2 Demonstrate how this can be utilised for making business decisions
<b>Digital Business and New Technologies - Skills</b>	5.3 Identify service/ organisational improvements and opportunities for innovation and growth, using qualitative and quantitative analysis of information and data and benchmarking against others.	5.3.1 Demonstrate the use of qualitative and quantitative analysis of information to identify service/ organisational improvements and opportunities for innovation and growth 5.3.2 Analyse information and data to benchmark against others.
<b>Interpersonal Excellence – leading people and developing collaborative relationships</b>		
<b>Communication - Knowledge</b>  <i>(The apprentice needs to know and/or understand)</i>	6.1 Different forms of communication (written, verbal non-verbal, digital) and how to apply them.	6.1.1 Evaluate different types of communication and the application of these analyse their strengths and weaknesses in different contexts
	6.2 How to maintain personal presence and present to large groups	6.2.1 Determine how to maintain personal presence 6.2.2 Prepare and present successfully to large groups
	6.3 Interpersonal skills awareness including effective listening, influencing techniques, negotiating and persuasion.	6.3.1 Analyse own interpersonal skills and take responsibility to further develop of these
<b>Communication - Skills</b>  <i>(The apprentice needs to be able to)</i>	6.4 Communicate clearly, effectively and regularly using oral, written and digital channels and platforms.	6.4.1 Show effective and appropriate use of all forms communication
	6.5 Use active listening and open questioning to structure	6.5.1 Use active listening and open questioning to structure conversations and discussions and

	conversations and discussions, and able to challenge when appropriate.	<i>demonstrate the use of these to challenge others when appropriate</i>
	6.6 Manage and chair meetings and clearly present actions and outcomes	<i>6.6.1 Demonstrate confident and effective chairing of meetings including preparation and follow up</i>
	6.7 Apply influencing and persuading skills, to the dynamics and politics of personal interactions	<i>6.7.1 Effectively apply influencing and persuading skills to the dynamics and politics of personal interactions.</i>
<b>Leading People - Knowledge</b>  <i>(The apprentice needs to know and/or understand)</i>	7.1 Different inclusive leadership styles and models, how to develop teams and support people using coaching and mentoring approaches	<i>7.1.1 Evaluate a range of leadership styles and models to include inclusive leadership</i> <i>7.1.2 Know own leadership style and how to adapt to situations</i> <i>7.1.3 Evaluate the use of coaching and mentoring approaches to supporting people and developing teams</i>
	7.2 Organisational culture and diversity management	<i>7.2.1 Evaluate types of organisational culture and how these are created</i> <i>7.2.2 Explain diversity management and review approach in own organisation</i>
<b>Leading People - Skills</b>  <i>(The apprentice needs to be able to)</i>	7.3 Articulate organisational purpose and values.	<i>7.3.1 Explain purpose and values and analyse how effectively these are communicated and articulated in own organisation</i>
	7.4 Support the creation of an inclusive, high performance work culture.	<i>7.4.1 Take actions that support the creation of an inclusive work culture</i> <i>7.4.2 Take actions that support the creation of an high performance work culture</i>
	7.5 Enable others to achieve by developing and supporting them through coaching and mentoring.	<i>7.5.1 Enable others to achieve by developing and supporting them through coaching and mentoring.</i>
<b>Managing People - Knowledge</b>  <i>(The apprentice needs to know and/or understand)</i>	8.1 How to recruit, manage and develop people, using inclusive talent management approaches.	<i>8.1.1 Explain recruitment strategies and review the effectiveness of own organisations strategy</i> <i>8.1.2 Examine inclusive talent management approaches and how this can be used to recruit, manage, and develop people</i> <i>8.1.3 Analyse the use of inclusive talent management within own organisation</i>
	8.2 How to use HR systems and processes to ensure legal requirements, health and safety, and wellbeing needs	<i>8.2.1 Discuss the use of HR systems and processes to ensure legal requirements, health and safety, and well-being needs are met</i>
	8.3 How to set goals and manage performance	<i>8.3.1 Critically evaluate goal setting theories and models</i> <i>8.3.2 Set realistic achievable goals for others, monitoring and managing progress towards these</i>
<b>Managing People - Skills</b>  <i>(The apprentice needs to be able to)</i>	8.4 Build teams, empower and motivate others to improve performance or achieve outcomes.	<i>8.4.1 Demonstrate successful team building skills to significantly empower and motivate others</i>
	8.5 Delegate to others, provide clear guidance and monitor progress.	<i>8.5.1 Identify and delegate tasks to others, demonstrating the provision of clear guidance and the effective monitoring of progress to achieve positive results</i>
	8.6 Set goals and accountabilities.	<i>8.6.1 Set realistic goals for others and ensure accountability.</i>



<b>Developing Collaborative Relationships - Knowledge</b>  <i>(The apprentice needs to know and/or understand)</i>	9.1 Approaches to stakeholder, customer and supplier management, developing engagement, facilitating cross functional working and negotiation.	9.1.1 Describe the principles of stakeholder, customer and supplier engagement and management 9.1.2 Analyse stakeholder, customer and supplier engagement and management in own organisation and identify strategies for improvement 9.1.3 Explain the benefits and challenges of cross-functional working and apply this method of working to deliver positive results 9.1.4 Evaluate negotiation strategies and practice these
	9.2 How to shape common purpose, as well as approaches to conflict management and dispute resolution.	9.2.1 Explain methods for shaping common purpose 9.2.2 Evaluate models of conflict management and resolution and successfully apply these
<b>Developing Collaborative Relationships - Skills</b>  <i>(The apprentice needs to be able to)</i>	9.3 Build rapport and trust, develop networks and maintain relationships with people from a range of cultures, backgrounds and levels.	9.3.1 Develop and maintain networks and relationships 9.3.2 Build rapport and trust, demonstrating how this takes place with all people including those from different cultures, backgrounds and levels
	9.4 Contribute within a team environment.	9.4.1 Demonstrate useful contributions to a team environment
	9.5 Effectively influence and negotiate, being able to have challenging conversations and give constructive feedback.	9.5.1 Demonstrate effective negotiation and influencing skills 9.5.2 Manage difficult conversations and give constructive feedback
	9.6 Work collaboratively with internal and external customers and suppliers.	9.6.1 Demonstrate collaborative working with internal customers 9.6.2 Demonstrate collaborative working with external customers and suppliers.
<b>Personal Effectiveness – managing self</b>		
<b>Awareness of Self and Others - Knowledge</b>  <i>(The apprentice needs to know and/or understand)</i>	10.1 How to be self-aware and recognise different learning styles.	<i>10.1.1 Evaluate theories of learning styles and apply to self and others</i>
	10.2 How to use emotional and social intelligence, and active listening and open questioning to work effectively with others.	<i>10.2.1 Evaluate models of emotional intelligence and their use in the workplace 10.2.2 Evaluate the concept of social intelligence and its use in the workplace 10.2.3 Explain the importance of active listening and open questioning and demonstrate their uses in working with others</i>
<b>Awareness of Self and Others - Skills</b>  <i>(The apprentice needs to be able to)</i>	10.3 Reflect on own performance, identifying and acting on learning and development needs.	<i>10.3.1 Analyse own performance, identifying learning and development needs 10.3.2 Devise and implement strategies to address learning and development needs</i>
	10.4 Understand impact on others.	<i>10.4.1 Explain factors that influence impact on others, both positive and negative, and demonstrate a positive impact on others</i>
	10.5 Manage stress and personal well-being, being confident in knowing core values and drivers.	<i>10.5.1 Determine and apply stress management techniques in the workplace to ensure personal well-being 10.5.2 Demonstrate confidence in knowledge of core values and reflect these in own performance.</i>



<b>Management of Self - Knowledge</b>  <i>(The apprentice needs to know and/or understand)</i>	11.1 How to manage time, set goals, prioritise activities and undertake forward planning in a business environment with a focus on outcomes.	11.1.1 Assess a broad range of techniques for managing time 11.1.2 Review own time management skills and create and implement strategies to improve 11.1.3 Evaluate goal setting theories and models 11.1.4 Set achievable goals/ objectives for self and monitor progress towards these
<b>Management of Self - Skills</b>  <i>(The apprentice needs to be able to)</i>	11.2 Create personal development plan, and use widely recognised tools and techniques to ensure the management of time and pressure effectively, and prioritisation and strategic alignment of activities.	11.2.1 Demonstrate use of time management techniques and tools 11.2.2 Effectively manage own workload to achieve objectives 11.2.3 Align personal development objectives to the organisational strategy 11.2.4 Demonstrate on-going commitment to personal development.
<b>Decision Making - Knowledge</b>  <i>(The apprentice needs to know and/or understand)</i>	12.1 How to undertake research, data analysis, problem solving and decision-making techniques	12.1.1 Critically evaluate research methods and the types of data generated 12.1.2 Analyse complex data and draw sensible conclusions 12.1.3 Evaluate and apply problem solving techniques 12.1.4 Evaluate and apply decision making techniques
	12.2 The values, ethics and governance of your organisation.	12.2.1 Describe and evaluate the values and ethics of your organisation 12.2.2 Review the impact of the governance of your organisation in terms of the decision making process
<b>Decision Making - Skills</b>  <i>(The apprentice needs to be able to)</i>	12.3 Use evidence-based tools and ethical approaches to undertake problem solving and critical analysis, synthesis and evaluation to support decision making	12.3.1 Demonstrate the use of evidence based tools to solve problems 12.3.2 Demonstrate the consistent use of critical analysis, synthesis and evaluation to support decision making 12.3.3 Use ethical approaches in problem solving and decision making.
<b>Behaviours required</b> <i>(The apprentice needs to be demonstrate how they have developed and exhibited each of the following behaviours within the workplace)</i>		
<b>Takes Responsibility</b>	Drive to achieve in all aspects of work Demonstrates resilience and determination when managing difficult situations Seeks new opportunities underpinned by commercial acumen and sound judgement.	
<b>Inclusive</b>	Open, approachable, authentic, and able to build trust with others Seeks the views of others and values diversity internally and externally.	
<b>Agile</b>	Flexible to the needs of the organisation • Is creative, innovative and enterprising when seeking solutions to business needs Positive and adaptable, responding well to feedback and need for change Open to new ways of working and new management theories.	
<b>Professionalism</b>	Sets an example, and is ethical, fair, consistent and impartial Operates within organisational values and adheres to the requirements of relevant professional bodies.	

## APPENDIX 4 - CMI Command Verbs

Below is a list of the CMI command verbs that apprentices may find useful and/or want to use to ensure they are fully meeting the relevant assessment criteria within annex 3 of the [L6 Chartered Management Degree Apprenticeship \(CMDA\)](#) occupational standard.

Command Verb	Definition
<b>Analyse</b>	Break the subject or complex situation(s) into separate parts and examine each part in detail; identify the main issues and show how the main ideas are related to practice and why they are important. Reference to current research or theory may support the analysis.
<b>Assess</b>	Provide a reasoned judgement or rationale of the standard, quality, value or importance of something, informed by relevant facts/rationale.
<b>Consider</b>	Take (something) into account (i.e. different ideas, perspectives, theories, evidence) when making a judgement
<b>Create</b>	Originate or produce a solution to a problem.
<b>Define</b>	Show or state clearly and accurately.
<b>Develop</b>	Elaborate, expand or progress an idea from a starting point, building upon given information.
<b>Evaluate</b>	Consider the strengths and weaknesses, arguments for and against and/or similarities and differences. The writer should then judge the evidence from the different perspectives and make a valid conclusion or reasoned judgement. Apply current research or theories to support the evaluation when applicable.
<b>Examine</b>	Inspect (something) thoroughly in order to determine its nature or condition.
<b>Explain</b>	Make something clear to someone by describing or revealing relevant information in more detail.
<b>Explore</b>	Go through the topic/issue thoroughly looking at all areas that affect the topic/issue.
<b>Formulate</b>	To devise or develop an idea or concept in a concise and systematic way.
<b>Identify</b>	Ascertain the origin, nature or definitive characteristics of something.
<b>Outline</b>	A general description/broad account/summary of something showing essential features/outline the case briefly but not the detail.
<b>Recommend</b>	Put forward proposals, an alternative or suggestion(s) supported by a clear rationale appropriate to the situation/context.
<b>Reflect</b>	Consciously contemplate, appraise or give balanced consideration to an action or issue.
<b>Review</b>	To examine, survey, reconsider a subject, theory or item.
<b>Specify</b>	Identify or state a fact or requirement clearly and precisely in detail.
<b>Use</b>	The action of using something for a particular purpose.

## APPENDIX 5 - Version History

Version	Reason for change	Date amended
1.0	Document development and approval	30/6/2023