EPA STANDARD SPECIFICATION

g gateway
qualifications

Version and date	Change detail	Section / page
v1.0 September 2025	Document created	

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1. Qualification information

1.1 About this standard specification

This End-point Assessment (EPA) specification sets out what is required to complete the EPA in Corporate Responsibility & Sustainability Practitioner. The document contains information regarding the planning and delivery of the EPA process and is intended for use by all parties involved in the process.

EPA is an independent assessment of the knowledge, skills and behaviours (KSBs) that have been learnt throughout an apprenticeship.

This document should be used in conjunction with the published assessment plan on the Skills England website and the EPA Support Pack provided by Gateway Qualifications for this standard.

Gateway Qualifications is a nationally regulated Awarding Organisation that supports education and training providers through its strong relationships, adaptability and expert team.

Key information	
Standard name	Corporate Responsibility & Sustainability Practitioner
Standard reference number	ST0934
Assessment plan version	1.1
Level	4
Ofqual QN	TBC
Sector	Business and administration
Minimum time on-programme with the provider	12 months
EPA duration	Typically 6 months
EPA methods	Assessment method 1: Professional discussion underpinned by a portfolio of evidence Assessment method 2: Work-based project followed by a report, and a presentation with questions and answers
Overall grade	Fail/Pass/Distinction
EQA organisation	Ofqual
Gateway requirements	Level 2 English and Maths

1.2 Purpose

The overall purpose of the EPA is to ensure that the apprentice has met the required level of knowledge, skills and behaviours set by employers and approved by Skills England.

2. EPA journey

2.1 On-programme requirements

Full time apprentices will typically spend 12-36 months on-programme (before the EPA Gateway meeting) working towards the occupational standard. All apprentices must spend the minimum required time on programme undertaking off-the-job training as per the relevant apprenticeship funding rules.

All apprentices must spend a minimum of 12 months on-programme. In all cases this will be no less than 366 days but may be longer. However, for apprentices starting this standard from the 1st August 2025, this will change to a minimum of 8 months on programme. This will be checked by the provider before the apprentice is submitted for EPA Gateway.

Learning progress should be supported by regular 1-to-1s between the apprentice and the employer.

These sessions should:

- set learning goals
- track apprentice progress
- create a forum for coaching and guidance
- co-ordinate the required amount of apprentice time being spent in off-the-job training.

Any gaps should be identified that may prevent the apprentice meeting the learning outcomes of the apprenticeship. For example, the training provider and employer can discuss types of work and responsibilities of the apprentice to assess whether this is suitable in meeting the Standard.

The provider should support with tutorials and appropriate resources.

2.2 EPA Gateway

The employer makes the final decision to progress the apprentice to EPA, by reviewing the Portfolio of Learning and performance of the apprentice in meeting the Standard.

If the employer feels that the apprentice has met the learning outcomes, and is competent in the apprenticeship role, they should progress the apprentice to EPA.

The employer must confirm that the apprentice is ready to complete the EPA before they can pass through the EPA Gateway, and this will be documented on EPA Pro via the Gateway

Declaration and Authentication Statement. This notifies Gateway Qualifications that the apprentice is ready for their EPA.

Before the apprentice can enter the EPA Gateway process, the following evidence is required:

- Gateway Declaration and Authentication Statement (this must be signed using an e-signature via a document signing service, such as DocuSign, or a wet signature)
- Reasonable Adjustments Request Form, if applicable (this must be submitted no later than 30 days prior to the EPA Gateway submission)
- Portfolio of Evidence (for Assessment method 1)
- The project title, brief summary and terms of reference (for Assessment method 2).

If the apprentice is aged 16-18 years, they must have achieved English and Maths qualifications to at least Level 2. If the apprentice is aged 19+ when they begin their apprenticeship, the requirement for the attainment of these qualifications is optional (effective from 11th February 2025). Employers may choose whether these qualifications are necessary, and further details regarding funding can be found in the latest funding rules.

Apprentices will not be accepted at EPA Gateway if the evidence required is not sufficiently met.

For those with an education, health and care plan or a legacy statement, the apprenticeships English and Maths minimum requirement is Entry Level 3. British Sign Language qualifications are an alternative to English qualifications for whom this is their primary language.

Before the apprentice enters the EPA Gateway, they should be comfortable with the assessments they will complete and ready to demonstrate they can achieve the standard of the apprenticeship.

2.3 EPA Planning Meeting

Gateway Qualifications will schedule the EPA Planning Meeting with the apprentice and the employer. The meeting will take place once the EPA Gateway evidence has been accepted, and the apprentice has entered the end-point assessment phase of the apprenticeship.

The purpose of the EPA Planning Meeting is to:

- schedule each assessment activity
- identify the requirements of each EPA assessment method
- facilitate the employer's understanding of the EPA process
- answer any questions or concerns the apprentice may have about the EPA process
- aid in the preparation requirements, e.g., arranging access, facilities, and resources
- discuss feedback post EPA
- explain certification upon completion of the apprenticeship

- explain the appeals process

2.4 Assessment overview

The assessment methods for the Corporate Responsibility & Sustainability Practitioner EPA consist of the following:

- Assessment method 1: Professional discussion underpinned by a portfolio of evidence

- Assessment method 2: Work-based project followed by a report and a presentation with questions and answers

2.5 Assessment method 1 - Professional discussion underpinned by a portfolio of evidence

The apprentice has a formal two-way conversation with the Independent Assessor (IA) which is underpinned by the portfolio of evidence that they have produced.

Assessment overview	
Mode of assessment	A professional discussion underpinned by a portfolio of evidence.
Duration	60 minutes
Grading	Fail/Pass/Distinction
Assessed by	Independent Assessor (IA)
Assessment method weighting	All assessment methods are equally weighted

The Portfolio of Evidence:

The apprentice must compile a portfolio of evidence during the on-programme period of the apprenticeship, and this must be submitted to Gateway Qualifications before the apprentice begins their EPA (the EPA gateway point).

The portfolio of evidence is not directly assessed; its purpose is to support the apprentice in the professional discussion element of this assessment method.

Requirements for the portfolio of evidence:

- should only contain evidence related to the KSBs mapped to this assessment method.
- typically contains 16 discrete pieces of evidence which must be mapped against the KSBs related to this assessment method.
- evidence can be used to demonstrate more than one KSB, and may include the following items (**note:** this is not definitive, and other sources can be used):

- o workplace documentation/records, for example, workplace policies/procedures, records
- o witness statements
- o annotated photographs
- o video clips (maximum total duration 15 minutes); the apprentice must be in view and identifiable
- should **not** include reflective accounts, or any methods of self-assessment
- any employer contributions should focus on direct observation of performance, **not** opinions
- evidence should be valid and attributable to the apprentice – a statement from the employer and apprentice to confirm this should be included in the portfolio

The Professional Discussion:

The professional discussion must last for **60** minutes. This time can be increased by up to 10% at the IA's discretion.

The apprentice is allowed to refer to, and illustrate their answers with, evidence from their portfolio of evidence.

The IA will ask the apprentice a minimum of **10** questions, and will cover the following topics/themes:

- CR&S business structures & opportunities
- CR&S relationships
- CR&S strategy and management
- CR&S principles
- The CR&S learning agenda

2.6 Assessment method 2 - Work-based project followed by a report and a presentation with questions and answers

The apprentice will complete a work-based project that has real CR&S application and benefit to the employer.

They will them complete both components of Assessment method 2 to allow them to demonstrate the KSBs mapped to this assessment.

Assessment overview	
Mode of assessment	Component 1: Completion of a project report (submitted to Gateway Qualifications) Component 2: Presentation with questions and answers
Duration	Component 1: 16 weeks Component 2: 45 minutes (typically 20 minutes for the presentation and 25 minutes for questioning)

Grading	Fail/Pass/Distinction
Assessed by	Independent Assessor (IA)
Assessment method weighting	All assessment methods are equally weighted

The Project:

Apprentices will undertake a work-based project in the form of conducting research, planning and delivering work, and then writing up their findings in a project report.

The project starts after the apprentice has gone through the gateway, they will be given 16 weeks to complete and submit the work-based project report (which communicates their findings) to Gateway Qualifications.

The project will be typically based on any one of the following areas (though any project with a focus to increasing CR&S activity within the apprentice's organisation may be considered):

- Identify a specific problem within a workplace that is a barrier to embedding CR&S initiatives, and undertake a plan to overcome the barrier to influence the change.
- Review current CR&S practice to increase performance within a team/workplace/organisation.
- Design a new CR&S campaign that meets the apprentice's own organisation's objectives.

A project may involve external partners, internal teams, or both. If a project involves external stakeholders, employers should be assured that the project will go ahead.

As part of the project, the apprentice must consider and manage financial implications (for example, the cost of staff time), however, the project does not need to include a discrete financial budget.

The work-based project should be designed to ensure that the apprentice's work meets the needs of the employer, is relevant to their role and allows the relevant KSBs to be demonstrated for the EPA. Therefore, the project's subject, title and scope will be agreed between the apprentice, the employer and Gateway Qualifications at the gateway.

At the gateway, the apprentice is required to submit all of the following:

- their proposed project title
- a brief summary of what the project will cover, plus the terms of reference (**maximum 500 words**). This must include:
  - a summary of the project plan (demonstrating that the work-based project and report will provide sufficient opportunity for the apprentice to meet the relevant KSBs)
  - research requirements
  - an overview of how the project will be planned including timeframes
  - the date that the work-based project report must be submitted to the IA.

Please note, the items above are **not** assessed. Gateway Qualifications will sign-off the project if it is deemed suitable, at this point the project can commence and the EPA period

will begin. If Gateway Qualifications disagree that the project is suitable, the apprentice is permitted to re-draft their proposal. The EPA period will not start until this has been signed off.

Component 1 - The Project Report:

The project report is compiled once the apprentice has gone through the gateway and completed the work-based project (submitted to Gateway Qualifications no later than 16 weeks after the approval of the report scope and title).

Employers must allow apprentices 30 working days of time within this period of time to do so.

The report can be paper-based or electronic and has a word limit of **5,000 words** (with a tolerance of + / - 10%, at the discretion of the apprentice).

- Annexes such as appendices, diagrams and references are **not** included in this total, but they must **not exceed 1,500 words**.

The apprentice is required to document their assumptions and highlight the consequences of those assumptions. This will enable them to demonstrate:

- their CR&S knowledge and understanding
- the limitations of the project and data analysis
- their ability to apply thinking and problem-solving skills

At a minimum, the project report must include:

- an introduction
- the scope of the project (including key performance indicators and financial implications)
- a project plan
- research and findings
- project outcomes
- how the outcomes were achieved
- recommendations and conclusions
- an appendix containing mapping of KSBs to the report

When the project report is submitted to Gateway Qualifications, the employer and the apprentice should verify that the submitted work is that of the apprentice and has been completed within 30 working days.

Component 2 - The Presentation with questions and answers:

This component will take place after the gateway, and once the project report has been completed and submitted.

The apprentice will be given at least 2 weeks' notice of the date/time of the presentation. They are not required to submit any materials ahead of this date, but they must notify Gateway Qualifications of any presentation requirements.

The apprentice will create a presentation, which must cover:

- a summary of the problem, recurring issue or idea/opportunity
- methodology
- high-level findings
- recommendations
- a summary of the project's conclusion and plans for evaluation.

The apprentice can deliver the presentation in the following ways: verbal only (i.e. no visuals), paper-based or/and electronic visuals. To deliver the presentation, the apprentice can use:

- presentation software they've already notified Gateway Qualifications about
- flip chart
- laptop/computer
- notes
- interactive whiteboards
- anything else they've already notified/agreed with Gateway Qualifications.

The presentation will typically last for **20** minutes, however, the IA has the discretion to increase the time by up to 10% to allow the apprentice to complete their last point.

Following the presentation, the IA will typically have **25** minutes of time in which they will ask the apprentice a minimum of **6** questions. Any number of follow-up questions are permitted within the time available. The purpose of these questions is to:

- confirm the IA's understanding of the project report and presentation, and how they demonstrate the relevant KSBs.
- support the apprentice to constructively demonstrate and discuss their project and their competence in terms of the relevant KSBs.

2.7 Grading requirements

The Corporate Responsibility & Sustainability Practitioner apprenticeship standard is graded fail, pass or distinction, with the final grade based on the apprentice's combined performance in each of the assessment methods.

To achieve a pass overall, the apprentice must achieve a pass in both assessment methods by meeting all the pass descriptors. To achieve a distinction overall, the apprentice must achieve a distinction in both assessment methods by meeting all the distinction descriptors.

Failure of any component of the EPA will result in an overall failure of EPA and the apprenticeship.

Grades from individual assessment methods should be combined in the following way to determine the grade of the EPA as a whole:

Project report with presentation and questioning	Interview underpinned by portfolio of evidence	Overall Grading
Fail	Any grade	Fail
Any grade	Fail	Fail
Pass	Pass	Pass
Pass	Distinction	Pass
Distinction	Pass	Pass
Distinction	Distinction	Distinction

3. Results notification and enquiries about results

Gateway Qualifications will send the statement of results notification to the apprentice, employer and provider by email. Results notification will take place once all assessments have been completed. The statement of results will detail the grade for each assessment method and the overall grade of the apprenticeship.

Results will be available for employers and providers on EPA Pro.

For a pass/distinction grade, an internal statement of results is shared with the apprentice and employer. This is not the official apprenticeship certificate.

For a fail grade, the results notification will include details regarding the next steps.

Where an apprentice is not satisfied with the results of their EPA, the employer, apprentice or provider can enquire about the results.

Should an apprentice, employer or provider wish to submit a formal appeal about an assessment decision, please refer to Gateway Qualifications Appeals Policy and procedure.

4. Resits and retakes

An apprentice who fails one or more assessment methods can take a re-sit or a re-take. The apprentice's employer needs to agree that either a re-sit or re-take is appropriate. A re-sit does not need further learning, whereas a re-take does.

An apprentice should have a supportive action plan to prepare for a re-sit or a re-take.

The employer and Gateway Qualifications agree the timescale for a re-sit or re-take. A re-sit is typically taken within 2 months of the EPA outcome notification. The timescale for a re-take is dependent on how much re-training is required and is typically taken within 3 months of the EPA outcome notification.

Failed assessment methods must be re-sat or re-taken within a 6-month period from the EPA outcome notification, otherwise the entire EPA will need to be re-sat or re-taken in full.

Re-sits and re-takes are not offered to an apprentice wishing to move from pass to distinction.

An apprentice will get a maximum EPA grade of pass for a re-sit or re-take, unless Gateway Qualifications determines there are exceptional circumstances.

5. Access Arrangements, Reasonable Adjustments and Special Considerations

Gateway Qualifications understands its requirement as an Awarding Organisation to make access arrangements and reasonable adjustments for learners with a disability (in accordance with the Equality Act 2010) in order that they are not at a substantial disadvantage in comparison to someone who does not have a disability. Further information is provided in the Gateway Qualifications' Reasonable Adjustment and Special Consideration Policy.

A reasonable adjustment is unique to an individual and should reflect their normal way of working.

Apprentices should be fully involved in any decisions about adjustments/adaptations.

The Gateway Qualifications' Reasonable Adjustments Form must be completed and submitted to apply for approval. Applications for reasonable adjustments should ideally be submitted to Gateway Qualifications when the learner is registered but no later than 30 days prior to the EPA Gateway submission.

Special Considerations

A special consideration is consideration to be given to a learner who has temporarily experienced an illness or injury, or some other event outside of the learner's control, which has had, or is reasonably likely to have materially affected the learner's ability to: (a) take an

assessment, or (b) demonstrate his or her level of attainment in an assessment." (From Ofqual, General Conditions of Recognition)

Apprentices and Employers should always aim to reschedule an assessment in the first instance. Applying a special consideration should be a last resort and must not compromise the integrity of an assessment or the reliability and validity of its outcome.

The Gateway Qualifications' Special Consideration Request Form must be completed and submitted for approval. Requests for special considerations should be submitted no later than two working days before the assessment or as soon as possible after the assessment, and no later than two working days after the assessment.

Appendix 1 – Mapping of KSBs to grade themes

Assessment method 1: Professional discussion underpinned by a portfolio of evidence

KSBs grouped by theme	Knowledge	Skills	Behaviour
CR&S Business Structures and Opportunities **K5 K21** **S4 S8 S18**	How the positioning of the CR&S function within organisational and governance structures can impact CR&S performance. (K5) Horizon scanning techniques for keeping up to date with the CR&S landscape (including evolving best practice and what other organisations are doing). (K21)	Utilise strengths of internal organisational structures to help build self-sustaining CR&S populations. (S4) Recommend opportunities for external engagement, articulating the mutual benefits and risks. (S8) Research the CR&S landscape, escalating best practice opportunities within own organisation. (S18)	None
CR&S Relationships K6 K7 K8 K16 S5 S6 S14 B6	Techniques to identify/evaluate the internal and external range of potential CR&S partners. (K6) Techniques for managing and influencing stakeholder relationships. (K7) Principles of negotiating a CR&S project with an internal and/or external partner. (K8)	Tailor approach to maintaining new/existing external stakeholder relationships to achieve progress on plans (e.g. objectives, key initiatives and shared interests). (S5) Contribute to the negotiation of	Stand by difficult CR&S decisions and hold your team/organisation to account. (B6)

KSBs grouped by theme	Knowledge	Skills	Behaviour
	Factors that contribute to successful CR&S event management. (K16)	external CR&S projects of mutual benefit. (S6) Deliver CR&S events in accordance with contractual arrangements. (S14)	
CR&S Strategy and Management K4 K11 K19 K26 S10 S16	The types of metrics and insight evidence that help inform CR&S issues. (K4) Principles for developing a strategy that manages the social, environmental and ethical risks and opportunities of an organisation. (K11) The importance & impact of the sector specific factors (the legislation, guidance and best practice) when developing a CR&S strategy. (K19) How CR&S delivery is impacted by the environment, social and governance agendas affecting industry. (K26)	Contribute to the drafting of the CR&S strategy. (S10) Contribute to reporting externally on CR&S Strategy and delivery in line with industry and legislative requirements. (S16)	None
CR&S Principles K17 K18 K24 K25 S15 S21 B7	The principles of CR&S fundraising. (K17) Quality assurance techniques for monitoring the delivery of CR&S work. (K18)	Quality assure own and others work in accordance with organisational requirements. (S15) Identify and deliver	Ethical and non-judgmental. (B7)

KSBs grouped by theme	Knowledge	Skills	Behaviour
	How responsible corporate approaches bring mutually compatible organisation and societal benefits. (K24) The range of sustainable practices available to any organisation including in-house practices, partner policies, and outputs. (K25)	initiatives that may raise funds for CR&S projects. (S21)	
The CR&S Learning Agenda K23 K27 S20 B2	The different ways in which people learn and how this links to embedding CR&S ethos. (K23) How CR&S Strategy influences talent management, reputation and branding. (K27)	Train colleagues in CR&S techniques, tailoring the learning style to the circumstances. (S20)	Committed to developing self and others in ways that support CR&S engagement. (B2)

Assessment method 2: Work-based project followed by a report and a presentation with questions and answers

KSBs	Knowledge	Skills	Behaviour
K1 K2 K3 K9 K10 K12 K13 K14 K15 K20 K22 **S1 S2 S3 S7 S9 S11 S12 S13 S17 S19 S22** **B1 B3 B4 B5**	Principles of project management and a range of project planning tools. (K1) Principles of change management and culture management. (K2) Potential CR&S data sources including organisational, sectoral and stakeholder. (K3) Different forms of communication (written, verbal, electronic) and how to tailor the solution to the circumstances. (K9) Techniques for reporting on CR&S delivery against objectives. (K10) Techniques that recognise and utilise the comparative strengths and weaknesses across teams and across the organisation. (K12) Techniques to motivate individuals to work together to meet CR&S requirements. (K13) The principles of data management including how to	Select and implement project management and planning tools applicable to the type of project/campaign lifecycle. (S1) Assess the effectiveness of change and identify opportunities to improve outcomes, guiding and supporting others to deliver results. (S2) Balance own CR&S workload to prioritise competing demands and achieve key performance indicators. (S3) Adopt a communication method that takes account of the audience and is suitable for the circumstances. (S7) Contribute to written reports on CR&S performance in line with organisational requirements. (S9) Adjust leadership style to achieve results, having regard to the needs of the individual/teams involved. (S11) Select data that is	Actively champion the CR&S agenda/ethos. (B1) Works within own level of authority, seeking support when needed. (B3) Takes the lead in helping others to achieve CR&S results. (within limits of own role). (B4) Seeks innovative ways to add value to CR&S issues while remaining objective. (B5)

KSBs	Knowledge	Skills	Behaviour
	manipulate and store data needed for CR&S projects. (K14) Techniques that compare a range of qualitative and quantitative data on CR&S performance. (K15) The principles of risk management including conducting and reviewing risks affecting a CR&S strategy. (for example, safeguarding risk). (K20) Principles of CR&S related budget management. (K22)	relevant to the CR&S issue being considered. (S12) Analyse data to form evidence-based conclusions on CR&S performance. (S13) Identify own organisations CR&S opportunities and threats. Escalate risks within own organisation when needed. (S17) Apply management techniques needed to deliver CR&S projects within budget. (S19) Identify and apply relevant IT solutions to CR&S issues. (S22)	

Appendix 2 - Grade descriptors

Assessment method 1: Professional discussion underpinned by a portfolio of evidence

Fail – the apprentice does not meet the pass criteria

Theme	KSBs	Pass	Distinction
		(all descriptors below must be met)	**(all descriptors below <u>plus</u> all pass descriptors must be met)**
CR&S Business Structures and Opportunities	**K5 -** How the positioning of the CR&S function within organisational and governance structures can impact CR&S performance. **K21 -** Horizon scanning techniques for keeping up to date with the CR&S landscape (including evolving best practice and what other organisations are doing). **S4 -** Utilise strengths of internal organisational structures to help build self-sustaining CR&S populations. **S8 -** Recommend opportunities for external engagement, articulating the mutual benefits and risks. **S18 -** Research the CR&S landscape, escalating best practice opportunities within own organisation.	Describes how they utilise organisational/governance structures when building a CR&S self-sustaining working practice, providing examples of how these impact on CR&S performance. (K5, S4) Justifies their selection and use of horizon scanning and research techniques for improving practice within their own organisation and identifying opportunities for external engagement, describing how they balanced risks and benefits. (K21, S8, S18)	Evaluates the comparative strengths and weaknesses of the approach to CR&S positioning within the organisational/governance structure in which they work. (K5, S4)

Theme	KSBs	Pass	Distinction
		(all descriptors below must be met)	(all descriptors below <u>plus</u> all pass descriptors must be met)
CR&S Relationships	**K6 -** Techniques to identify/evaluate the internal and external range of potential CR&S partners. **K7 -** Techniques for managing and influencing stakeholder relationships. **K8 -** Principles of negotiating a CR&S project with an internal and/or external partner. **K16 -** Factors that contribute to successful CR&S event management. **S5 -** Tailor approach to maintaining new/existing external stakeholder relationships to achieve progress on plans (e.g. objectives, key initiatives and shared interests). **S6 -** Contribute to the negotiation of external CR&S projects of mutual benefit. **S14 -** Deliver CR&S events in accordance with contractual arrangements.	Explains and justifies the relationship management techniques they use to maintain and influence their network of internal/external stakeholder relationships to progress desired CR&S outcomes. (K6, K7, S5) Describes a time when they contributed to their own organisation's negotiation of an external project of mutual benefit, evaluating how the techniques used contributed to successful outcomes and the impact of standing by difficult decisions. (K8, S6, B6) Describes a time when they delivered a CR&S event that involved an external contract, analysing the factors that contributed to its success and how contractual arrangements were met. (K16, S14)	Evaluates the methods they have used to build, influence and manage stakeholder relationships and how they tailored their approach to achieve their objectives. (K6, K7, S5)

Theme	KSBs	Pass (all descriptors below must be met)	Distinction (all descriptors below <u>plus</u> all pass descriptors must be met)
	B6 - Stand by difficult CR&S decisions and hold your team/organisation to account.		
CR&S Strategy and Management	**K4 -** The types of metrics and insight evidence that help inform CR&S issues. **K11 -** Principles for developing a strategy that manages the social, environmental and ethical risks and opportunities of an organisation. **K19 -** The importance & impact of the sector specific factors (the legislation, guidance and best practice) when developing a CR&S strategy. **K26 -** How CR&S delivery is impacted by the environment, social and governance agendas affecting industry. **S10 -** Contribute to the drafting of the CR&S strategy. **S16 -** Contribute to reporting externally on CR&S Strategy and delivery in line with industry and legislative requirements.	Describes how their own contribution to CR&S external reports on performance has helped their organisation meet its expected industry and legislative reporting requirements, outlining the metrics used to provide insights into performance. (K4, S16) Explains how their contribution to CR&S strategy development took into account environmental, social, ethical, industrial and sector specific factors and agendas, balancing opportunity and risks. (K11, K19, K26, S10)	Evaluates how the interdependencies of environment, social and governance agendas influence CR&S strategic approaches in their organisation. (K19, K26, S10)

Theme	KSBs	Pass (all descriptors below must be met)	Distinction (all descriptors below plus all pass descriptors must be met)
CR&S Principles	**K17 -** The principles of CR&S fundraising. **K18 -** Quality assurance techniques for monitoring the delivery of CR&S work. **K24 -** How responsible corporate approaches bring mutually compatible organisation and societal benefits. **K25 -** The range of sustainable practices available to any organisation including in-house practices, partner policies, and outputs. **S15 -** Quality assure own and others work in accordance with organisational requirements. **S21 -** Identify and deliver initiatives that may raise funds for CR&S projects. **B7 -** Ethical and non-judgmental.	Explains how they ensure their selected approach to assurance of CR&S delivery is ethical, non-judgemental and meets organisational requirements for corporate responsibility, sustainability and quality. (K18, S15, B7) Evaluates the range of sustainable practices available to any organisation and the mutual benefits responsible corporate approaches bring to their organisation and society. (K24, K25) Describes a time when they delivered an event to raise funds, justifying their chosen approach with reference to fundraising principles. (K17, S21)	Analyses different fundraising techniques and principles. Describes their reasons for discounting at least two alternative approaches to raising funding. (K17, S21)
The CR&S Learning Agenda	**K23 -** The different ways in which people learn and how this links to embedding CR&S ethos. **K27 -** How CR&S Strategy influences talent management, reputation and branding.	Reflects on how they created and designed a tailored CR&S leaning plan for themselves and others in their own organisation, taking account of different learning styles to embed CR&S ethos. (K23, S20, B2)	Critiques different approaches to developing the expected CR&S ethos and the considerations they take into account when developing learning opportunities. (K23, S20, B2)

Theme	KSBs	Pass (all descriptors below must be met)	Distinction (all descriptors below plus all pass descriptors must be met)
	S20 - Train colleagues in CR&S techniques, tailoring the learning style to the circumstances. **B2 -** Committed to developing self and others in ways that support CR&S engagement.	Outlines how any organisation's chosen approach to CR&S strategy can influence the extent to which it manages its staff talent programme, manage its external reputation, and its ability to use effective corporate branding. (K27)	

Assessment method 2: Work-based project followed by a report and a presentation with questions and answers

Fail – the apprentice does not meet the pass criteria

KSBs	Pass (all descriptors below must be met)	Distinction (all descriptors below <u>plus</u> all pass descriptors must be met)
K1 - Principles of project management and a range of project planning tools. **S1 - Select and implement project management and planning tools applicable to the type of project/campaign lifecycle.** **B3 - Works within own level of authority, seeking support when needed.**	Chooses and applies planning tools relevant to the project, setting appropriate timeframes, preparation of tasks and objectives within own scope of authority, seeking support when needed. (K1, S1, B3)	Evaluates their selection and implementation of project management and planning tools and identifies dependencies including escalation routes. (K1, S1, B3)
K2 - Principles of change management and culture management. **S2 - Assess the effectiveness of change and identify opportunities to improve outcomes, guiding and supporting others to deliver results.** **B1 - Actively champion the CR&S agenda/ethos.**	Utilises both change management and culture management techniques in innovating CR&S activities that champion the CR&S issue under consideration and demonstrate value. Evaluates impact of CR&S engagement to identify further opportunities for stakeholder engagement to improve future CR&S performance. (K2, S2, B1, B5)	No distinction grading criteria for these KSBs

KSBs	Pass (all descriptors below must be met)	Distinction (all descriptors below <u>plus</u> all pass descriptors must be met)
B5 - Seeks innovative ways to add value to CR&S issues while remaining objective.		
K3 - Potential CR&S data sources including organisational, sectoral and stakeholder. **K14 - The principles of data management including how to manipulate and store data needed for CR&S projects.** **K15 - Techniques that compare a range of qualitative and quantitative data on CR&S performance.** **S12 - Select data that is relevant to the CR&S issue being considered.** **S13 - Analyse data to form evidence-based conclusions on CR&S performance.**	Sources, manipulates and analyses a range of data including quantitative and qualitative to provide a secure evidence base, complying with legislative and organisational security and storage requirements. (K3, K14, K15, S12, S13)	No distinction grading criteria for these KSBs
K9 - Different forms of communication (written, verbal, electronic) and how to tailor the solution to the circumstances. **S7 - Adopt a communication method that takes account of the audience and is suitable for the circumstances.**	Justifies their selected communication approach with reference to the audience and the circumstances. (K9, S7)	Evaluates their selected approach to communication and reflects on how future communications might be enhanced. (K9, S7)

KSBs	Pass (all descriptors below must be met)	Distinction (all descriptors below plus all pass descriptors must be met)
K10 - Techniques for reporting on CR&S delivery against objectives. S9 - Contribute to written reports on CR&S performance in line with organisational requirements.	Considers the most appropriate techniques for producing a report showing the extent to which all CR&S objectives within scope have been met. (K10, S9)	No distinction grading criteria for these KSBs
K12 - Techniques that recognise and utilise the comparative strengths and weaknesses across teams and across the organisation. K13 - Techniques to motivate individuals to work together to meet CR&S requirements. S3 -Balance own CR&S workload to prioritise competing demands and achieve key performance indicators. S11 - Adjust leadership style to achieve results, having regard to the needs of the individual/teams involved. B4 - Takes the lead in helping others to achieve CR&S results. (within limits of own role).	Demonstrates how their approach to a CR&S issue had regard to the comparative strengths and weaknesses of the key affected stakeholder groups and motivated and led them to work together. Additionally, how they balanced the group dynamic with their own competing workload to prioritise and deliver the required tasks. (K12, K13, S3, S11, B4)	Justifies their selected approach to allocating and driving CR&S work across their team, articulating why other approaches were discounted when seeking to meet CR&S requirements. (K12, K13, S3, S11, B4)
K20 - The principles of risk management including conducting and reviewing risks	Demonstrates how all potential CR&S risks, threats and opportunities are identified; and	No distinction grading criteria for these KSBs

KSBs	Pass (all descriptors below must be met)	Distinction (all descriptors below plus all pass descriptors must be met)
affecting a CR&S strategy. (for example, safeguarding risk). **S17 - Identify own organisations CR&S opportunities and threats. Escalate risks within own organisation when needed.**	also escalated when outside their own scope. (K20, S17)	
K22 - Principles of CR&S related budget management. **S19 - Apply management techniques needed to deliver CR&S projects within budget.**	Demonstrates how they have applied the principles of budget management to the direct and indirect costs of the project, fully justifying any overrun. (K22, S19)	No distinction grading criteria for these KSBs
S22 - Identify and apply relevant IT solutions to CR&S issues.	Evaluates potential IT solutions, applying them where appropriate. (S22)	No distinction grading criteria for these KSBs