

Level 4 Insurance Professional (7414-14)

December 2019 Version 2.3

End-Point Assessment Pack

For independent end-point assessors

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Version and date	Change detail	Section
2.1 September 2017	Commercial Awareness, 1.5.3 sentence updated.	Appendix 2, Level 4 Insurance Professional Holistic Assessment – Front Sheet
2.2 November 2017	C&G logo	Throughout
2.3 December 2019	Introduction updated	Section 1
	Preparing evidence for submission section added	Task Instructions for centres/employers
	Recording Forms removed	

1. Introduction

About this Apprenticeship Occupation

This Apprenticeship is designed as a progression route for those having completed the Insurance Practitioner or for higher level entry, where employers believe this is appropriate for the apprentice. Successful apprentices can progress into a variety of careers with supporting professional qualifications. Future career paths could include underwriting, client relations, insurance claims, loss adjusting, broking, reinsurance and account management.

The role is applicable to a wide range of employers across the sector in both large and small firms. As such the assessment plan needs to have the flexibility to cater for these different operating models, support structures and commercial requirements.

The model has been driven by an employer steering group, supported by 2 Professional Bodies, The Chartered Insurance Institute (CII) and The Chartered Institute of Loss Adjusters (CILA) who supply the qualifications required by this role and those required in the anticipated progression routes.

The principles driving the design of the assessment plan are as follows:

1. The assessment process should add value to both the apprentice and the employer, by complementing and building on normal performance management and development tools.
2. It should enable and encourage progression and continuous professional development by being linked to professional exams and recognition.
3. It should add value to the apprentice's journey, both during and at the end of the apprenticeship so that this is seen as helping them build not only competence in the role, but also a career in the organisation wherever possible.
4. And it should provide continuity of approach where appropriate with the level 3 Insurance Practitioner assessment plan, whilst taking into account the higher level demands of the level learning outcomes.

What is in this document

- The occupation standard
- Resource requirements for end-point assessment
- Timeline for end-point assessment
- End assessment tasks and guidance on grading
- Guidance for the independent end-point assessor
- Guidance for the centre/employer
- Guidance for the apprentice

End-point assessments

The focus of the end-point assessment (EPA) is for the apprentice to fully demonstrate the knowledge, skills and behaviours set out in the apprenticeship standard and to be able to demonstrate this level of professional competence in authentic workplace contexts.

Apprentices are expected to achieve EPA to conclude their apprenticeship. The EPA is formal summative assessment that conclude the apprenticeship programme. The Level 4 Insurance Professional apprenticeship is assessed in two ways to provide a clear indication of the apprentice's knowledge, skills and behaviours. These methods of EPA will be:

- Portfolio of evidence
- Reflective discussion

This pack contains specific guidance around the assessments of the specific occupation, for an overview summary of all assessment methods that could be used as part of EPA please see the Independent End-point Assessor Manual.

Grading

This apprenticeship is graded Fail, Pass and Distinction. EPAs will be assessed and graded by City & Guilds Independent End-point Assessors (IEPA), more information about how each assessment is graded and how the overall apprenticeship grade is determined can be found in later sections of this document.

Entry requirements for End-point assessment

To be eligible for end-point assessment the Apprentice must have successfully achieved **one** of the following:

- Chartered Insurance Institute (CII)
- Chartered Institute of Loss Adjusters (CILA)

Apprentices will also have achieved Level 2 Mathematics and Level 2 English qualifications (or relevant equivalent) either during or before their apprenticeship.

Gateway – prior to End-point assessment

The Gateway process is designed to provide an opportunity for the employer/training provider to review progress of the apprentice and confirm that they are eligible for carrying out end-point assessment. The employer/ training provider will review the apprentice's achievements to date, ensuring that all entry requirements have been met and that the apprentice is proficient in all areas of the standard.

On completion of the Gateway process, the employer/ training provider will be required to complete a **Gateway Declaration Form**. This form will be submitted to City & Guilds when completing an apprentice booking for End-point assessment.

Security, confidentiality & copyright of end-point assessment materials

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Additional conditions of use City & Guilds End-Point Assessment Materials for Independent End-Point Assessors are protected by copyright and are supplied only to Independent End-Point Assessors for use solely for the purpose of summative assessment.

The following conditions, which apply to City & Guilds Assessment Materials, are additional to:

- the **Standard Copying Conditions** which can be found at <https://www.cityandguilds.com/help/copyright> and
- (where the City & Guilds Assessment Materials are dated examinations), the JCQ Instructions for Conducting Examinations. <https://www.jcq.org.uk/exams-office/ice--instructions-for-conducting-examinations>

The Independent End-Point Assessor must: ·

Level 4 Insurance Professional (7414-14) - Independent End-point Assessor Assessment Pack

- only use the City & Guilds End-Point Assessment Materials in formal, summative end-point assessment leading to the award of an apprenticeship and not for any other purpose (including, but not restricted to, teaching, revision, as practice assessments or for commercial purposes).
- handle and store securely the City & Guilds End-point Assessment Materials in accordance with the following conditions -
 - City & Guilds End-Point Assessment Materials must be accessible to apprentices only during formal end-point assessment as governed by the assessment conditions specified for the individual apprenticeship; -
 - The portfolio of the apprentice may contain assessment results referenced to the assessment taken but should not contain the City & Guilds End-Point Assessment Materials (such as assessment tasks or questions or marked scripts if the tests may be reused (unless otherwise stated)); -
 - The content of any City & Guilds End-Point Assessment Materials must not be made public in any format, either in part or in full; -
 - City & Guilds End-Point Assessment Materials must be securely handled and under no circumstances shared with third party organisations (including centres and employers) or individuals.

2. Occupational Standard – Insurance Professional

Knowledge	What is required
1.1 Insurance market	A comprehensive understanding of the insurance market and the available products and services.
1.2 Risk and Regulatory	A comprehensive understanding of the Financial Services legal and regulatory framework and organisational policies and procedures to ensure compliance. Demonstrates an understanding of how a range of situations may be affected by legal and insurance principles.
1.3 Clients and Colleagues	An understanding of the importance of being proactive in developing the relationships and networks required to be successful in the role, whilst achieving business objectives and ensuring that client needs are met.
1.4 Processes and Procedures	A clear understanding of the processes and procedures relevant to the technical requirements of the role and their impact on the wider organisation and industry.
1.5 Commercial awareness	An understanding of the impact of change within the insurance market and how it affects the role and the wider organisation. Understands and can differentiate between the organisation's short, medium and long term business objectives.

Skills	What is required
2.1 Technical ability	<p>Ability to apply technical knowledge and experience to deliver positive outcomes to all stakeholders utilising appropriate policies and procedures.</p> <p>Ability to apply legal and insurance principles, knowledge of the market structure and its processes, procedures and documentation to a range of complex situations.</p>
2.2 Relationship development	Can proactively identify, generate and develop relationships and networks that support the role, including but not limited to internal/external/market led/professional and peer relationships. Can leverage relationships to improve the reliability of customer service based on customer feedback. Engages with and supports colleagues so that they are empowered to resolve customers' issues within organisational guidelines.
2.3 Ownership and initiative	Takes ownership for delivering in their area of responsibility. Finds ways to progress and meet commitments when issues arise, being creative where appropriate. Escalates issues and decisions where necessary. Identifies and proposes business process improvements.
2.4 Governance	Applies legal and regulatory requirements to work compliantly, whilst promoting a culture of Treating Customers Fairly. Assesses whether organisational processes and procedures and those that follow them are compliant with legal and regulatory requirements.

Skills	What is required
2.5 Advice and support	Provides technical advice and support to others on complex insurance matters.

Behaviours	What is required
4.1 Drive to excel	An understanding of own and company performance measures and the application of this knowledge to contribute positively to key business objectives. Shares own knowledge and experience to support others to achieve personal and business objectives.
4.2 Communication	Adapts communication and resources to take account of the target audience including less experienced colleagues. Presents information accurately and effectively using more complex communication methods such as reports and presentations. Communicates using the necessary technical language but articulates this in a way that others can understand.
4.3 Personal Accountability	Acts using own initiative to accomplish objectives and seeks alternatives when barriers arise. Tenacious in finding the best solutions, demonstrating commitment to the role and the Insurance Industry.
4.4 Innovation	Proactively able to challenge the status quo by considering the feasibility of suggested ideas and improvement considering the impact they may have on business objectives.
4.5 Professionalism	Truthful, sincere in their actions (even when not the easiest) and demonstrates Utmost Good Faith. Demonstrates role model behaviour in approach to colleagues, clients and partners.

3. End-point assessment guidance for Independent End Assessors

Introducing the end-point assessments to the apprentice

Employers/training providers should make the apprentice aware of the different assessment methods that make up the end-point assessment (EPA) of the apprenticeship prior to the gateway process.

While end-point assessments will be assessed by the Independent End-point Assessor (IEPA) for this apprenticeship the following assessment methods it is the responsibility of the employer/training provider to introduce the assessments to the apprentice ahead of the end-point assessment.

- Portfolio of evidence
- Reflective discussion

The reflective discussion will be chaired by the Training Provider, the completed assessments will then be holistically graded by the IEPA.

The specific details around what the employer/training provider will share with the apprentice and the timelines can be found in the **Task Instructions for Centres/Employers** sections within this document. When introducing any assessments it is expected that employer/training providers set a realistic timeframe for completion of each assessment, and that this should align with any timeline agreed with City & Guilds when booking end-point assessment.

If assessments are not completed within the agreed timeframe without the apprentice having a good reason, the timeline for any independent end-point assessment visit may be reviewed. City & Guilds End-Point Assessment team would liaise with IEPAs directly around this.

For any assessments that occur over a longer duration employers/training providers are expected to work with apprentices to develop a submission schedule that aligns with the overall timeline for assessments and with any timelines agreed with City & Guilds when booking end-point assessment.

Types of tasks

Portfolio

A portfolio focuses on the demonstration of achievement and should be constructed to show the best of what the apprentice can do against a set of specified criteria. A minimum of three different types of evidence must be collated to demonstrate competence and authenticate the assessment. Evidence may include but is not limited to; written work or case studies, internal compliance audits, project work done in the role, formal performance review or appraisal, CPD log, apprentice reflection.

Reflective discussion.

A reflective discussion will take the form of a structured interview. The discussion provides a good opportunity to explore authenticity and also allow assessors to identify, validate and probe for aspects of skill, knowledge and behaviour that have not been fully covered in the portfolio. The discussion will explore how the Apprentice has progressed in their role.

The reflective discussion must be voice recorded.

The two End-point assessments will be holistically graded by a City & Guilds IEPA. The grade will be determined by using the grading criteria as detailed by the Insurance Professional Assessment Plan.

Health and safety / Codes of practice

The importance of safe working practices, the demands of the Health and Safety at Work Act and the Codes of Practice associated with the industry **must** always be adhered to.

The requirement to follow safe working practices is an integral part of all City & Guilds assessments, and it is the responsibility of the training provider/employer to ensure that all relevant health and safety requirements are in place before apprentices begin any practical assessment.

Should an apprentice fail to follow correct health and safety practices and procedures during practical assessment, the assessment **will be stopped** by the training provider and the apprentice advised of the reasons why. The apprentice should be informed that they have not reached the standard of assessment required. It is at the discretion of the training provider to confirm whether the end assessment can restart.

Authenticating the Apprentices work

When making judgements on evidence of unobserved tasks, the IEPA must ensure all decisions satisfy VACS – that the evidence is Valid, Authentic, Current and Sufficient. For evidence produced outside controlled conditions the Apprentice will be required to:

- sign a declaration that the work is their own
- reference all sources.

The centre/employer can also aid authentication by:

- supplementary (oral) questioning to gauge familiarity with the topic
- looking out for any changes to the apprentices usual writing style, unusual sources/examples or the use of e.g. US spellings or phrases that might indicate cutting and pasting from the internet
- requiring access to evidence of steps in the process e.g. drafts, notes, planning etc.

For further information on authenticating work, see: www.ofqual.gov.uk/plagiarism-teachers.

City & Guilds have produced evidence reference forms that include a declaration of authenticity form, these must be completed when submitting evidence and can be found in the EPA recording forms for EPA customers/end-point assessment customers/employers document. These should be completed and signed by both the tutor/employer and the apprentice.

Recording forms

City & Guilds have designed specific recording forms for this apprenticeship, some for centres / employers / training providers to use and some for IEPAs to use.

These can be found in **End-Point Assessment Recording Forms for Centres/End-point Assessment Customers/Employers** document.

Centres must use the forms provided by City & Guilds in the format laid out in the document.

IEPAs should ensure that any notes that are recorded on these forms are recorded in a way that another assessor who was not present at the assessment can clearly see why grading/marking decisions have been made.

Notes on the grading criteria

The two end-point assessments will be holistically graded by a City & Guilds IEPA. The grade will be determined using the grading criteria as detailed by the Insurance Professional Assessment Plan.

Determining the apprenticeship grade

The information provided here shows how the grade for the apprenticeship will be determined. The IEPA will be responsible for completing grading for all tasks, and in communicating these outcomes to City & Guilds for overall grading of the apprenticeship. The overall grade for the apprenticeship will be determined using a holistic approach, where the IEPA decides the apprentice's final grade for the whole apprenticeship based on their performance in both of the assessment tasks.

Assessment method	Grade scale
Portfolio of evidence	X/P/D
Reflective discussion	

Grading takes place at the end of the apprenticeship, following the completion of the portfolio of evidence and reflective discussion. There is one grade, the tasks are not graded separately.

The overall grade for the apprenticeship will be calculated based on a sum of the apprentices' achievement across the two assessment. A minimum of 70% of the criteria, must be assessed via Portfolio, this must also include a minimum of one learning outcome per competency.

The Insurance Professional will have two grades of achievement; pass and distinction.

To achieve a **pass**, the apprentice must achieve 100% of the criteria from across knowledge, skills and behaviours using both methods of assessment. A minimum of 70% of the criteria assessed by portfolio of evidence, including a minimum of 1 criteria per competency.

To achieve a **distinction**, the apprentice must achieve everything at pass grade and achieve the minimum of 20 distinction criteria from the skills and behaviours. At least one distinction mark is required from each of the 10 competencies. The knowledge competencies are considered as pass or fail, with no distinction differentiator.

Feedback

The Training Provider will **not** provide any feedback to the apprentice during or immediately following the end assessment process. Feedback (if given) will only be provided to fail apprentices, following submission of evidence to City & Guilds and after any grade determination has been carried out.

Results submission and Certification

The City & Guilds Independent End-point Assessor (IEPA) will submit the apprentice results to City & Guilds. City & Guilds will issue the End-Point Assessment record of achievement confirming the grade achieved and will notify the appropriate body who will issue the Apprenticeship certificate.

Opportunities to resit

Apprentices who fail the End-Point Assessment will have to resubmit both tasks due to the holistic nature of the grading. The apprentice may add to or refine their portfolio of evidence but will be

required to attend another reflective discussion. An apprentice should not be allowed to repeat until it is evident that they are ready to undertake the tasks.

4 End-point Assessment Resources list

Resource required
A suitable room for the reflective discussion to take place, large enough to accommodate all those involved
Voice recording equipment
Access to water and cups
Internet access (e-portfolio)

5 End-point Assessment timeline

The process of setting up the end-point assessment, will typically begin six months before the completion of the apprenticeship as shown in this table:

Timeline	Activity
Six months before planned completion	<p>Line manager/Training Provider:</p> <ul style="list-style-type: none"> reviews progress and ensures apprentices' performance is on track as part of the regular performance management system identifies any gaps and creates a plan for the end-point assessment with the apprentice considers whether apprentice's potential evidence for portfolio is appropriate and sufficient to assess the standard (a minimum of 70% of the learning outcomes).
Four months before planned completion	<p>Line manager/Training Provider and apprentice:</p> <ul style="list-style-type: none"> meet to review progress for final assessment refine plans for all components of the final end-point assessment. <p>Apprentice</p> <ul style="list-style-type: none"> starts completing work portfolio.
Three months planned completion (Gateway)	<p>Line manager:</p> <ul style="list-style-type: none"> Books interview date with the training provider <p>Training Provider</p> <ul style="list-style-type: none"> Books end-point Assessment with Independent Assessment Organisation EPA team.
Two months before planned completion	<p>Line manager/ Apprentice</p> <ul style="list-style-type: none"> submits portfolio of evidence to Training Provider. <p>Training Provider</p> <ul style="list-style-type: none"> reviews the portfolio of evidence and prepares for the reflective discussion.
Two months before planned completion	<p>Training Provider/ Apprentice</p> <ul style="list-style-type: none"> Reflective discussion takes place (chaired by Training Provider)
One months before planned completion	<p>Training Provider</p> <ul style="list-style-type: none"> submits portfolio and reflective discussion to EPA team for end-point assessment.

Timeline	Activity
End of apprenticeship	EPA Team <ul style="list-style-type: none"> assessments holistically graded by Independent Assessment Organisation. grading communicated.

Assessment 704/754 End-point Assessment - Holistic

Assessment specification

The two components of the final assessment and the assessment tools being used in this apprenticeship all require the apprentice to demonstrate their knowledge, skills and behaviours in an integrated manner to deliver the learning outcomes required to meet the standard.

The assessment process will build a cumulative and holistic picture, from both components of the final assessment, of how well the apprentice meets or exceeds the standard.

Component	Description	Coverage	Grading
704/754	Portfolio/ reflective discussion	Knowledge: 1.1 – 1.5 Skills: 2.1 – 2.5 Behaviours: 3.1-3.5	P/D/X

Assessment 704/754 End-point Assessment - Holistic

Task instructions for Independent End-point Assessors

Task 1 – Portfolio of evidence

A portfolio of evidence of work will be compiled during the apprenticeship, demonstrating the required knowledge, skills and behaviours. Alongside work-based evidence, it will also include evidence from others, such as mid-and-end of year performance reviews, reports from coaches and feedback from line managers demonstrating acceptable or better performance.

A minimum of 3 different types of evidence will be required to demonstrate competence and authenticate the assessment. The apprentice must include appropriate evidence to demonstrate the minimum requirements of the standard at the final stage of the programme as a 'portfolio', which attests to professional competence at the level.

A minimum of 70% of the learning outcomes must be evidenced in the Apprentice portfolio of evidence.

The portfolio will be submitted to the training provider in preparation for the reflective discussion. A signed copy of the End-point Assessment - Holistic Assessment Reference Form will be included. This form will reference all evidence to the standards.

Signing off the portfolio

When signing off the portfolio the line manager is not expected to make any assessment decision on what grade the apprentice has achieved. By signing and dating the declaration of authenticity form the line manager is confirming that they believe the apprentice will meet the minimum criteria in order to be eligible to submit their portfolio for End-point assessment and grading.

The Independent End-point Assessors **must** ensure all decisions satisfy VACS – the evidence is Valid, Authentic, Current and Sufficient, when making judgements on evidence of unobserved tasks.

Task 2 – Reflective discussion

The discussion will allow the training provider to explore particular areas, to analyse the full range of evidence, and to confirm performance against the standard. For example, questions could give the opportunity to confirm that the apprentice understands the risks of not following correct processes and adhering to the organisation's standards. The discussion will have a common overall structure, and the questions will focus mainly on those areas of the standard where they are seeking reassurance on some of the evidence of competence.

The purpose of the discussion is to:

- clarify any questions about the evidence presented in the portfolio;
- evidence any aspects of the standard that are not already evidenced in the portfolio through discussion of how the Apprentice performs their role;
- discuss how the apprentice has progressed in their role, what they have done and their approach to their work.'

The discussion will be voice recorded and uploaded to the apprentice electronic portfolio.

The training provider will use The Level 4 Insurance Professional Training Provider Preparation Form to prepare for the Reflective discussion. They will also use the Holistic Assessment Evidence Reference Form to tick the '*Evidence provided in*' column where evidence has been presented in the portfolio but they will not be making a judgement. It is the Independent End Assessors responsibility to select the appropriate grade for each criteria based on the descriptor.

The Training Provider will share any supporting document used before, during and after the Reflective Discussion with the City & Guilds End-point Assessment Team.

Grading

When the completed End-point assessments have been received by City & Guilds the IEPA will holistically assess both assessments using the Grading Criteria detailed in the End-point Assessment - Holistic Assessment Reference Form. Once a judgement has been made, the Overall grading / Feedback Form, must be completed and both forms uploaded to the EPA team.

Assessment 704/754 End-point Assessment - Holistic

Task instructions for Centres/Employers

Task 1 – Portfolio of evidence

A portfolio of evidence of work will be compiled during the apprenticeship, successfully demonstrating the required knowledge, skills and behaviours. Alongside work-based evidence, it will also include evidence from others, such as mid-and-end of year performance reviews, reports from coaches and feedback from line managers demonstrating acceptable or better performance.

A minimum of 3 different types of evidence will be required to demonstrate competence and authenticate the assessment. The apprentice must include appropriate evidence to demonstrate the minimum requirements of the standard at the final stage of the programme as a 'portfolio', which attests to professional competence at the level.

A minimum of 70% of the learning outcomes must be evidenced in the Apprentice portfolio of evidence.

All evidence must be labelled and referenced to the standard. The Level 4 Insurance Professional - Holistic Assessment Reference Form must be used to record evidence, this form can be found in the **End-Point Assessment Recording Forms for Centres/End-point Assessment Customers/Employers** document on City & Guilds website.

Preparing evidence for submission

Evidence being uploaded for EPA must be presented as follows:

- each piece of evidence must have a header containing the name of the apprentice together with the date the evidence was produced and an evidence reference number
- it is good practice, where possible, to add a handwritten/e-signature although this is not mandatory
- each piece of evidence must be referenced to the standard reference it is being submitted against on the 'Holistic Assessment Reference Form' (found in the **Insurance Professional EPA recording forms** document)

This is to ensure that each piece of evidence is cross-referenced to each relevant standard reference.

Presenting the evidence in this way also formally confirms that it is the apprentice's own work.

Signing off the portfolio

When signing off the portfolio the line manager is not expected to make any assessment decision on what grade the apprentice has achieved. The Line Manager, Apprentice and Training Provider will need to complete and sign the End-point Assessment – Holistic Reference form. By signing and dating the declaration of authenticity the Line Manager and Training Provider are confirming that they believe the apprentice will meet the minimum criteria in order to be eligible to submit their portfolio for end-point assessment and grading.

Task 2 – Reflective discussion

The reflective discussion will take the form of a structured interview with the training provider to explore the content of the portfolio and the apprentice journey in more detail.

Prior to the reflective discussion

Prior to the day of the reflective discussion taking place the training provider will review the portfolio of evidence against the criteria in order to prepare. The Level 4 Insurance Professional Holistic Assessment Reference Form must be used to support this activity. The training provider will not be grading the evidence in the portfolio.

The training provider will then prepare questions to:

- provide clarity on any evidence presented in the portfolio
- evidence any elements of the standard that have not been demonstrated through the portfolio –through discussion of how the apprentice performs their role
- find out how the apprentice has progressed in their role, what they have done and their approach to work

The **Training Provider Preparation Form** can be used when preparing for the reflective discussion. The training provider will not brief the apprentice in preparation for the reflective discussion.

The reflective discussion will allow the Training Provider to explore particular areas, to analyse the full range of evidence, and to confirm performance against the standard. For example, questions could give the opportunity to confirm that the Apprentice understands the risks of not following correct processes and adhering to the organisation's standards. The discussion will have a common overall structure, and the questions will focus mainly on those areas of the standard where they are seeking reassurance on some of the evidence of competence.

Time allowed for the reflective discussion

The reflective discussion will typically last between 30 and 60 minutes.

The assessment environment

The training provider must ensure that any discussions take place in comfortable, quiet surroundings which are free from distractions and interruptions.

Disruption to the discussion may invalidate the process and may lead to complaints and appeals. Care should consequently be taken to make sure that signposting and other arrangements are in place to maintain a suitable environment for the assessment.

Introducing the reflective discussion

It is important that the training provider ensures that actions are taken to help put the apprentice at ease at the beginning of the discussion and before collection of evidence begins. This is to enable an accurate assessment of the apprentice's knowledge, skills and behaviours by minimising the extent to which their performance may be hindered by anxiety.

The training provider should:

- introduce themselves and explain their role in the process
- remind the apprentice that the discussion will be recorded
- give the apprentice the opportunity to introduce themselves eg name, job role and brief overview of organisation
- summarise the purpose of the discussion
- emphasise that the confidentiality of their assessment will be maintained
- ask the apprentice if they have any questions before beginning the assessment

- not ask any leading questions.

The Training Provider must share any supporting document used before, during and after the reflective discussion with the City & Guilds IEPA.

The reflective discussion will be voice recorded and uploaded to the City& Guilds EPA portal.

Assessment 704/754

Task instructions for Apprentice

Task 1 – Portfolio of evidence

You will have compiled a log of evidence during your apprenticeship, successfully demonstrating the required knowledge, skills and behaviours. You must select appropriate evidence to demonstrate the minimum requirements of the standard at the final stage of the programme and attest to professional competence at the level. A minimum of 3 different types of evidence will be required to demonstrate competence and authenticate the assessment.

You must ensure a minimum of 70% of the learning outcomes are evidenced in your portfolio of evidence.

Your portfolio must be submitted to the training provider in preparation for the reflective discussion. When submitting your portfolio you must ensure that you signed a copy of the Level 4 Insurance Professional Holistic Assessment Reference Form.

Task 2 – Reflective discussion

You will be interviewed by the training provider. The discussion will allow the training provider to explore particular areas, to analyse the full range of evidence, and to confirm your performance against the standard. For example, questions may be asked to confirm you understand the risks of not following correct processes and adhering to the organisation's standards. The discussion will have a common overall structure, and the questions will focus mainly on those areas of the standard where the training provider is seeking reassurance on some of the evidence submitted.

Purpose of the reflective discussion

The reflective discussion will take the form of a structured interview with the Training Provider to explore the content of the portfolio and your journey in more detail.

The purpose of the discussion is to:

- clarify any questions about the evidence presented in the portfolio;
- evidence any aspects of the standard that are not already evidenced in the portfolio through discussion of how you have performed your role;
- discuss how you have progressed in the role, what you have done and your approach to the work.'

The reflective discussion will be voice recorded and uploaded to the City& Guilds EPA portal.

Time allowed for interview

The Reflective Discussion will typically last between 30 and 60 minutes.

Recording forms

All recording forms can be found in **Assessment pack recording form** document that is available in a word format. Please see below summary of the recording forms that are available for this apprenticeship.

Recording form	Purpose	Who should complete	Where Can it be found
Gateway declaration form	To confirm that the apprentice is ready for EPA	Training provider/employer	7414-14 EPA Recording forms for centres/end-point assessment customers/employers
End-point Assessment – Holistic Reference form	To reference the evidence in the Portfolio and reflective discussion to the standard and for the IEPA to mark.	Training provider/employer/apprentice/IEPA	7414-14 EPA Recording forms for centres/end-point assessment customers/employers
Training Provider preparation form	To prepare for the reflective discussion, the themes to explore and questions to ask	Training provider	7414-14 EPA Recording forms for centres/end-point assessment customers/employers
Apprenticeship Overall Grading	To calculate and record the final overall apprenticeship grade	IEPA	7414-14 EPA Recording forms for Independent End-point Assessors
Feedback form	To be used to provide feedback to any apprentices that fail any of the assessments within their apprenticeship	IEPA	7414-14 EPA Recording forms for Independent End-point Assessors

Useful contacts

Centres

Exam entries, Certificates,
Registrations/enrolment, Invoices, Missing
or late exam materials, Nominal roll reports,
Results

E: centresupport@cityandguilds.com

Learners

General qualification information

E: learnersupport@cityandguilds.com

Other contacts

For other contacts visit the Contact Us page
of our website

W: www.cityandguilds.com/help/contact-us

About City & Guilds

As the UK's leading vocational education organisation, City & Guilds is leading the talent revolution by inspiring people to unlock their potential and develop their skills. We offer over 500 qualifications across 28 industries through 8500 centres worldwide and award around two million certificates every year. City & Guilds is recognised and respected by employers across the world as a sign of quality and exceptional training.

City & Guilds Group

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