City & Guilds Level 3 End-point Assessment for Multi-channel Marketer (9610-12)

EPA Pack for Providers & Employers

Standard: ST1031

EPA Plan: Version 1.1

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For external use

Version	Summary of changes	Section
1.0 February 2024	Initial document	All
1.1 March 2024	Minimum duration to Gateway included.	Section 1 Apprenticeship Section 3 Gateway
1.2 December 2025	'Website' removed from S11.	Knowledge, skills and behaviour (KSBs)
2.0 March 2026	End point Assessment Plan version number has changed to V1.1 Full assessment codes have been added to each instance, eg 9610-700 For 9610-700 Written Project Report with Presentation and Questioning, further clarification has been added around the project and the example projects have been updated Moved the Mapping of KSBs to grade themes, grading descriptors and indicative content for 9610-700 Written project report with presentation and questioning to the end of the document	Throughout Section 5 Appendix 1

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1. Apprenticeships

This pack will help providers and employers prepare apprentices for the End-point Assessment (EPA) in City & Guilds Level 3 End-point Assessment for Multi-channel Marketer (9610-12) Apprenticeship Standard ST1031/V1.1. This pack explains how apprentices can demonstrate the knowledge, skills and behaviours (KSBs) developed during their apprenticeship.

This pack must be used alongside the:

- City & Guilds Manual for the End-point Assessment Service
- Recording Forms for Providers & Employers
- EPA Documents Library including information about the EPA Service, policies about malpractice and appeals, FAQs and a video about EPA which can be shared with apprentices
- Exemplar materials.

The City & Guilds Manual for the End-point Assessment Service includes information on:

- using EPA Pro
- the process for booking EPA, including timescales
- acceptable qualifications and certificates at Gateway
- uploading files to EPA Pro
- use of electronic signatures
- knowledge tests on E-volve (where applicable)
- responsibilities of providers and employers
- the Quality Assurance process.

Full time apprentices will typically spend 18 months on-programme (this means in training before the gateway) working towards meeting the Standard. All apprentices must spend **at least** 12 months on-programme. All apprentices must complete the required amount of off-the-job training specified by the apprenticeship funding rules. The employer should ensure that the apprentice has access to development opportunities to improve their knowledge, skills and behaviours, as outlined in the Standard, and hold regular reviews with the provider and apprentice to check progress and any other concerns.

Once the apprentice has completed their training, they should be ready to go through 'Gateway' to EPA. See the Gateway and Assessment Instructions sections within this pack to understand what happens.

The EPA for this apprenticeship includes the following assessments which can be taken in any order, as requested by the apprentice.

- Assessment method 1 – Written project report with presentation and questioning
- Assessment method 2 – Interview underpinned by portfolio of evidence

Preparing for EPA

In preparation for EPA, providers and employers should:

- read the Assessment Instructions sections before reaching Gateway – the EPA Partnership Managers can help with any queries
- review which completed Recording Forms and evidence must be submitted, and by when
- use the Recording Forms provided in the format laid out, unless indicated otherwise
- plan the venue and resources required for EPA – make sure the assessment environment is secure and comfortable, without interruptions
- use EPA Pro to help manage the apprentice's progress through EPA
- arrange for a designated contact to be available on the day to ensure the correct resources are available for the on-site assessment.

Some actions to help the apprentice prepare for EPA:

- Explain the assessments and Recording Forms to the apprentice – refer to details in the Assessment Instructions sections of this pack.
- Agree a realistic timeframe for submission of evidence that meets the EPA deadlines – any delays in submission of evidence will delay the assessments.
- Make sure the apprentice has the resources and time to prepare for and undertake EPA.
- Take the apprentice through some mock assessments.
- Share the EPA Preparation Guide with the apprentice. It includes information about system requirements for virtual meetings.
- Let City & Guilds know if reasonable adjustments are required to support an apprentice through EPA. The City & Guilds policy is on the City & Guilds website, under EPA Documents Library.

Authenticating the Apprentice's Work

The IEPA must ensure all decisions satisfy Validity, Authenticity, Currency and Sufficiency (VACS). 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 employer/provider should also aid authentication by:

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

City & Guilds have produced forms for use when reviewing evidence produced outside controlled conditions. These forms include a Declaration of Authenticity Form which must be completed when submitting evidence. The forms can be found in the Recording Forms document.

City & Guilds Position Statement on artificial intelligence

The following guidance on artificial intelligence (AI) is designed to help candidates, teachers and assessors to complete Non-Exam Assessments (NEAs), coursework and other internal assessments successfully. Please ensure familiarity with it.

Position Statement on AI | City & Guilds

Health & Safety and Codes of Practice

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

Following safe working practices is an integral part of all City & Guilds assessments and it is the responsibility of the provider and employer to ensure all the health & safety requirements are in place when apprentices are working on any projects, or before apprentices begin EPA.

Should an apprentice fail to follow correct health & safety practices and procedures during an EPA, the IEPA will consult with the EPA Team, and may advise the apprentice to stop and explain why.

Results Submission & Feedback

The IEPA will communicate the grade allocated for each assessment to the Lead Independent End-point Assessor (LIEPA) for quality assurance and sampling. The LIEPA will submit the results to the City & Guilds EPA Team.

If the apprentice has passed EPA, the City & Guilds EPA Team will issue the EPA Statement of Achievement to the Provider confirming the grade achieved and will notify Skills England who will issue the Apprenticeship certificate.

The IEPA will not provide feedback to the apprentice during or immediately following the assessment process. The provider will be informed by the City & Guilds EPA Team of the assessment results. Summary feedback will be provided to all apprentices after any grade determination has been carried out. The feedback will cover the areas against which insufficient evidence has been provided, leading to a 'Fail'. Our 'End-point Assessment Feedback' will also cover the areas against which the apprentice's evidence has resulted in the award of a Pass, Merit or Distinction.

Professional Recognition

City & Guilds Level 3 End-point Assessment for ST1031/AP1.1 Multi-channel Marketer (9610-12) apprenticeship will either wholly or partially satisfy the requirements for registration at this level for:

- Chartered Institute of Marketing (CIM) for Affiliate
- Digital Marketing Institute (DMI) for Power
- Data and Marketing Association (DMA) for Individual.

Statement of Achievement

A printed EPA Statement of Achievement will be issued to each successful apprentice.

Providers and employers with access can view and download PDF copies of the Statement 24 hours after the results are published. A PDF supports more efficient processing of funding claims by providing evidence of learner certification before the apprentice's paper certificate arrives.

The overall Apprenticeship certificate will be issued by Skills England.

Digital Credentials

A digital credential is a verified, visual representation of knowledge and skills earned in various learning environments. Please see an example below:

Level 3 End-point Assessment for ST1031/AP1.0 Mu... - Credly

Digital credentials are issued and verified online, making it easy for individuals to demonstrate their competencies to employers, clients, and peers online. Each digital credential has a unique URL that can be shared electronically via social media, in an email signature, and on a CV. This is a complimentary service in addition to the paper certificate.

For further information, please visit the City & Guilds EPA Digital Credentials webpage and the general terms in respect of our privacy policy or contact digitalsupport@cityandguilds.com.

Security, Confidentiality & Copyright of End-point Assessment Materials

The following Terms of Use apply to the use of any City & Guilds EPA Assessment Materials ("EPA Assessment Materials") included with the EPA Pack or otherwise provided by City & Guilds to the Customer from time to time under City & Guilds' EPA Service, by Customers. They form part of the agreement between City & Guilds and the Customer for provision of City & Guilds' EPA Service in accordance with the Manual for the End-point Assessment Service (hereafter the Manual).

EPA Assessment Materials include, but are not restricted to, venue and resources list, the handbook, EPA Pack, EPA Recording Forms, sample papers, assessment tasks, questions or marked scripts.

Customers are obliged to comply with these Terms of Use when using any EPA Assessment Materials from time to time, in addition to:

- the terms of the licence for use of City & Guilds materials set out under the Manual
- (where any EPA Assessment Materials are dated examinations), the City & Guilds invigilation instructions
- any conditions contained in a document itself.

Defined terms in these Terms of Use shall have the meaning given to them in the Manual.

Terms of Use

The Customer shall, and procure that the Customer's staff, shall:

- only use any EPA Assessment Materials for the purpose of formal, summative EPA assessment in connection with the agreement and not for any other purpose (including, but not restricted to, teaching, revision, as practice assessments or for commercial purposes) not make copies of any EPA Assessment Materials, whether in whole or in part, at any time
- handle and store any EPA Assessment Materials securely at all times
- ensure that:
- any EPA Assessment Materials are made accessible to Apprentices only during formal EPA assessment as governed by the assessment conditions specified for the individual Apprenticeship Standard;
- whilst the portfolio of an Apprentice may contain EPA assessment results referenced to the EPA assessment taken from time to time, they do not at any time contain the EPA Assessment Materials, unless otherwise stated in the individual Apprenticeship Standard; and
- the content of any EPA Assessment Materials is not made public in any format, whether in part or in full, at any time;
- under no circumstances share any EPA Assessment Materials with any third-party organisation or individual;
- seek written permission from City & Guilds if they wish to convert any EPA Assessment Materials for storage, retrieval and delivery in electronic form (i.e., using some form of e-assessment or e-learning system) from time to time; and
- provide access, on request, to City & Guilds to any system(s) on which any EPA Assessment Materials appear, are stored or delivered from time to time.

2. The Apprenticeship Standard

Occupation summary

Support customer focussed marketing activities that drive the demand for a product or service.

This occupation is found in small, medium, large and multinational organisations in private, public and third sectors such as: finance, construction, facilities, automotive, manufacturing, engineering, health, retail, food, hospitality and IT. Multi-channel marketers will sit within a specific company/agency that provides marketing deliverables and advice to external clients, or within an internal marketing team, delivering marketing activities to drive that business. The role will be primarily office-based or remote working. They may spend time away from the work area attending exhibitions and events, meetings with external marketing suppliers, marketing research suppliers, visiting clients, trade shows or supporting research activities.

The broad purpose of the occupation is to support customer-focussed marketing activities that drive the demand for a product or service through awareness raising and/or perception building to generate results to the bottom line. The emerging green economy is creating increasing opportunities for new and complex services and products. This may require marketing activities to be focussed on raising awareness of the benefits of carrying out transactions, purchases or products within an environmentally sustainable model.

As part of the marketing team the multi-channel marketers will contribute to the implementation of the marketing strategy and plans. They will be responsible for delivering day-to-day marketing activities across a multitude of platforms, channels and systems that are essential to the marketing function and activities of the company.

In their daily work, an employee in this occupation interacts with a wide range of internal stakeholders such as members of their own team, other departments such as sales, operations, public relations, IT, HR, customer services, senior management and finance.

They also interact with external stakeholders such as clients/customers and suppliers such as printers, digital agencies, PR and media agencies, event display companies, market research agencies and media sales professionals.

An employee in this occupation will be responsible for coordinating and delivering specific marketing activities such as marketing content creation, background market and customer research, monitoring campaign analytic and collecting data, using relevant marketing software/systems, maintaining marketing administration activities such as managing the supply of marketing literature, tracking marketing expenditure, supporting the procurement of, and overseeing the delivery of, work by external and internal marketing suppliers.

Multi-channel marketers will define, design, build and implement campaigns across a variety of platforms to drive customer engagement and retention. In addition, they will be responsible for parts of the campaign within their area of responsibility. As part of the marketing team, they will contribute to the implementation of the marketing strategy and plans and will have responsibility for elements of the overall marketing plan.

They will be the first point of contact for day-to-day activities in the marketing team and will be responsible for allocating higher levels of work to the management team. This role will work on their own and in a range of team settings. They work within agreed budgets and available resources. Multi-channel marketers work without high levels of supervision, usually reporting to senior stakeholders. They may occasionally be responsible for decision making on smaller areas of campaigns, but more often will support or influence the decisions of others.

Examples of job titles include Digital Communications Assistant, Digital Marketing Assistant, Marketing Administrator, Marketing Assistant, Marketing Communications Assistant, Marketing Junior, Social Media Assistant.

Occupational duties

This apprenticeship Standard has a number of duties which someone working in the role would typically be able to undertake. These duties are underpinned by a range of knowledge, skills, and behaviours (KSBs) which a successful apprentice will be able to demonstrate.

Duty	Knowledge, skills and behaviours
Duty 1 Contribute to the marketing plan, delivery or evaluation of strategic marketing activity through the creation of written planning and evaluation documents and presentations, eg marketing campaign, market and customer intelligence research, communicate and present to stakeholders, agencies and internal teams.	K1, K2, K3, K4, K11, K13, K14, K16, K17, K18, K19, K20, K21, K22 S1, S2, S3, S13, S15, S17 B4, B6
Duty 2 Use appropriate primary and/or secondary research methods including survey tools, key word research tools and desktop research to gather marketing insight or evaluation.	K5, K9, K10, K12, K18, K19 S4 B1
Duty 3 Use research data to inform marketing decisions, targeting, planning, delivery.	K1, K4, K11, K18, K20 S1, S2, S4, S9, S13, S15 B4
Duty 4 Source, create and edit content in collaboration with colleagues for appropriate marketing channels, such as website, email, social media, sales materials, affiliate marketing or event displays, ensuring that brand guidelines are met in order to achieve marketing objectives.	K6, K7, K9, K10, K11, K12, K13, K14, K15, K23 S3, S5, S6, S7, S8, S9 B1, B4
Duty 5 Support and manage the cataloguing of offline and digital marketing materials and assets in line with marketing regulations and legislation, including sustainability of hard copy and digital campaigns, eg storage and organisation of marketing materials, administering creative asset management systems, recycling/circular economy/energy consumption.	K6, K9, K13, K16, K23 S10, S13 B2

Duty	Knowledge, skills and behaviours
Duty 6 Publish, monitor and respond to editorial, creative or video content via website, social media/video sharing platforms, offline platforms.	K6, K7, K9, K10, K12, K15, K18, K19, K21, K22, K23 S5, S6, S7, S11, S13, S14 B1
Duty 7 Support the administration of marketing activities, eg organise a webinar or online/offline event; run an email campaign; run a pay per click (PPC) campaign; support press, advertising and PR activity; and partner marketing activity.	K6, K7, K9, K10, K11, K12, K13, K14, K15, K19 S2, S5, S6, S7, S8, S9, S11, S12, S16 B1, B2, B6
Duty 8 Use the organisation's customer relationship management system (in-house or externally sourced) to ensure accurate customer data and relationships are managed in the pursuit of marketing goals.	K9, K21, K22, K23 S10, S12, S13 B1, B3
Duty 9 Identify and use relevant/emerging trends, solutions and technologies to implement effective marketing activities.	K6, K7, K8, K10, K12, K19 S2, S5, S8, S11, S14, S18 B1, B3, B5
Duty 10 Contribute to the monitoring of marketing expenditure and activities to a specified budget and plan in line with company processes.	K11, K16, K18, K19 S12, S13, S15
Duty 11 Monitor, optimise, analyse and evaluate marketing campaigns and channels in order to deliver on marketing objectives for the organisation and/or clients, measuring marketing delivery effectiveness.	K11, K12, K13, K14, K16, K17, K20, K21, K22 S4, S6, S12, S13, S16, S17, S18 B1, B6

Knowledge, Skills & Behaviour (KSBs)

Ref.	Knowledge and understanding All apprentices must complete the KSBs below	Assessment method
Knowledge		
K1	Marketing theory, concepts and basic principles such as what marketing is, the marketing mix, the promotional mix and the difference between each channel used.	Interview underpinned by portfolio of evidence
K2	The business' structure, vision, and priorities objectives and how their marketing role supports these.	Project report with presentation and questioning
K3	Business tools used to measure the impact of business objectives, the wider environment and sustainability on marketing activities.	Project report with presentation and questioning
K4	What a marketing plan is, how it is built and its purpose.	Interview underpinned by portfolio of evidence
K5	The importance of competitor analysis and how to undertake it.	Interview underpinned by portfolio of evidence
K6	Brand theory such as positioning, value, identity, guidelines and tone of voice.	Project report with presentation and questioning
K7	Create content using principles of design and copywriting and how to adapt for online and offline mediums eg writing digital content for the web compared to leaflets.	Interview underpinned by portfolio of evidence

Ref.	Knowledge and understanding All apprentices must complete the KSBs below	Assessment method
K8	Current and emerging technologies, software and systems which impact on marketing.	Interview underpinned by portfolio of evidence
K9	Relevant regulatory and legislative requirements such as data protection, GDPR, cyber security, trading laws and copyright law for the handling and processing of data and its application.	Interview underpinned by portfolio of evidence
K10	Principles of conducting marketing communications in an ethical and diverse manner.	Interview underpinned by portfolio of evidence
K11	How internal stakeholders work to support the delivery of all marketing campaigns.	Project report with presentation and questioning
K12	Common marketing channels, cross-channel behaviour, and how to manage and operate an integrated campaign using online and offline channels.	Interview underpinned by portfolio of evidence
K13	How to brief and manage external marketing suppliers.	Interview underpinned by portfolio of evidence
K14	Adapt communications for appropriate stakeholders and internal audiences.	Project report with presentation and questioning
K15	The principles of content marketing, and content creation.	Interview underpinned by portfolio of evidence

Ref.	Knowledge and understanding All apprentices must complete the KSBs below	Assessment method
K16	Budget management and how to measure return on investment (ROI).	Interview underpinned by portfolio of evidence
K17	The metrics for the delivery and evaluation of marketing activity.	Project report with presentation and questioning
K18	The importance of reviewing campaigns regularly to ensure effectiveness and optimisation.	Project report with presentation and questioning
K19	The campaign management process including research, planning, budgeting, implementation, and delivery.	Project report with presentation and questioning
K20	Tools used to support campaign management such as social media, Gantt charts, data analytics and project management software.	Project report with presentation and questioning
K21	The customer journey including customer offline and digital touchpoints, customer personas, how to engage customers at different stages of their journey, sales funnels and how to segment an audience for targeting.	Interview underpinned by portfolio of evidence
K22	The impact marketing has on the level of customer service or the customer experience, including community management channels.	Interview underpinned by portfolio of evidence
K23	Quality management and the maintenance of online and offline assets.	Interview underpinned by portfolio of evidence

Ref.	Knowledge and understanding All apprentices must complete the KSBs below	Assessment method
Skills		
S1	Develop or interpret briefs for external or internal stakeholders and measure delivery in line with the specification and agreed timelines.	Project report with presentation and questioning
S2	Plan and coordinate a marketing activity using marketing tactics to acquire and retain one or more customer segments using available resources.	Project report with presentation and questioning
S3	Contribute to the generation of innovative and creative approaches across video, images, and other formats, both online and offline, to support campaign development.	Project report with presentation and questioning
S4	Use research/survey software to gather audience insight and/or evaluation to support the project.	Project report with presentation and questioning
S5	Use copywriting techniques to write persuasive text/copy to meet a communications objective ensuring it is in-line with organisational brand guidelines.	Project report with presentation and questioning
S6	Build and implement multi-channel campaigns across a variety of platforms, either offline or digital media.	Interview underpinned by portfolio of evidence
S7	Proofread marketing copy ensuring it is accurate, persuasive and is on brand.	Project report with presentation and questioning
S8	Use software to design and create marketing assets to meet the technical specification.	Interview underpinned by

Ref.	Knowledge and understanding All apprentices must complete the KSBs below	Assessment method
		portfolio of evidence
S9	Contribute to the research of external suppliers to support recommendations and procurement of marketing goods and services.	Interview underpinned by portfolio of evidence
S10	Organise offline and digital assets ensuring they are coordinated and legally compliant.	Interview underpinned by portfolio of evidence
S11	Use a content management system to publish text, images, and video/animated content.	Interview underpinned by portfolio of evidence
S12	Create and maintain spreadsheets to support marketing activities such as project/budget planning and organisation of marketing assets.	Project report with presentation and questioning
S13	Use technology and software packages to support day-to-day activities, eg stakeholder communications, development of briefs, data analysis, report writing, presentations and project management.	Project report with presentation and questioning
S14	Identify and use data and technologies to achieve marketing objectives.	Project report with presentation and questioning
S15	Monitor and amend campaigns to meet budget requirements including time and monetary costs.	Interview underpinned by portfolio of evidence

Ref.	Knowledge and understanding All apprentices must complete the KSBs below	Assessment method
S16	Reviews campaigns regularly to ensure effectiveness, to optimise the results.	Project report with presentation and questioning
S17	Measure and evaluate campaign delivery to identify areas for improvement.	Project report with presentation and questioning
S18	Use data analysis tools to record, interpret and analyse customer or campaign data.	Interview underpinned by portfolio of evidence
Behaviours		
B1	Has accountability and ownership of their tasks and workload.	Project report with presentation and questioning
B2	Takes responsibility, shows initiative and is organised.	Project report with presentation and questioning
B3	Works flexibly and adapts to circumstances.	Interview underpinned by portfolio of evidence
B4	Works collaboratively with others across the organisation and external stakeholders.	Project report with presentation and questioning
B5	Seeks learning opportunities and continuous professional development.	Interview underpinned by

Ref.	Knowledge and understanding All apprentices must complete the KSBs below	Assessment method
		portfolio of evidence
B6	Acts in a professional manner with integrity and confidentiality.	Interview underpinned by portfolio of evidence

Overall Grade

This End-point Assessment is graded Fail, Pass, Merit or Distinction. The EPA will be assessed and graded by the IEPA.

Information about how each assessment is graded can be found in the Assessment Instructions sections of this pack. The apprentice will fail an assessment method if they do not meet the Pass criteria.

Grades from the individual assessments will be combined to determine the overall grade.

A Fail in any assessment method will result in an EPA Fail.

Each assessment has equal weighting towards the overall grade.

The final grade is determined by holistic assessment.

Assessment 1: Project report with presentation and questioning	Assessment 2: Interview underpinned by portfolio of evidence	Overall Grading
Fail	Any grade	Fail
Any grade	Fail	Fail
Pass	Pass	Pass
Pass	Distinction	Merit
Distinction	Pass	Merit

Assessment 1: Project report with presentation and questioning	Assessment 2: Interview underpinned by portfolio of evidence	Overall Grading
Distinction	Distinction	Distinction

All assessment methods are weighted equally in their contribution to the overall EPA grade. The contribution of the assessments towards the EPA grade is as follows:

Assessment method	Grade scale	Contribution %
700 Project Report with presentation and questioning	X/P/D	50%
701 Interview underpinned by portfolio of evidence	X/P/D	50%
	Total	100%

3. Gateway

The EPA period will only start when the **employer** is satisfied that the apprentice is consistently working at, or above the level of, the Standard. The apprentice must be able to evidence that they fully demonstrate the Occupational Standard and required level of professional competence in an authentic workplace context. In making this decision, the employer could take advice from the provider, but the ultimate decision is made solely by the employer.

If there is a **provider** working alongside the employer, they should support the apprentice's preparation for Gateway.

The apprentice must meet the Gateway requirements before starting EPA.

- Must have achieved English and maths qualifications in line with the apprenticeship funding rules.
- For the Written Project report with presentation and questioning, the apprentice must submit a Project Scoping document. It should be no more than **500 words**. The apprentice must agree the subject, title and scope for their project with their employer and City & Guilds. The Project Scoping document is submitted for approval by the IEPA but is not assessed. The Project Scoping document does not count towards the overall EPA assessment.
- For the Interview underpinned by portfolio of evidence the apprentice must submit a portfolio of evidence and a signed and dated Evidence Matrix.

The following should be completed on EPA Pro:

- Gateway Declaration Form signed by the apprentice.
- Gateway Declaration signed by the provider, on behalf of the employer and tutor – confirming that the apprentice has completed at least 12 months on-programme (typically 18 months).

City & Guilds will confirm when all the Gateway requirements have been met. City & Guilds will assign an IEPA once Gateway has been approved. The IEPA will then review the project's title and scope and advise of its suitability.

The Assessment Instructions sections provide detail about the evidence which must be submitted at Gateway.

4. Timetable for End-point Assessment

The EPA period is typically completed within 5 months of the EPA Gateway, starting when City & Guilds has confirmed that all the Gateway requirements have been met and when the project Title and scope have been approved.

Further information about the booking process and timelines can be found in the City & Guilds Manual for the End-point Assessment Service.

On-going during on-programme	Evidence & Forms
Provider and employer • Reviews progress as part of their regular performance management process and ensures apprentice's performance is on track • Identifies any gaps and creates a plan with the apprentice • Considers whether the apprentice's potential evidence for the portfolio of evidence is appropriate and sufficient to cover the relevant KSBs (Knowledge, Skills, Behaviours) in scope and breadth • Ensures the apprentice works towards achieving English and mathematics qualifications in line with the apprenticeship funding rules, if not yet achieved • Starts to identify and plan an appropriate project for EPA approximately three months before Gateway • Enrols apprentice on EPA Pro and provides the 'Expected Date Ready for EPA'.	N/A
Apprentice • Completes the English and mathematics components of the apprenticeship • Compiles the portfolio of evidence.	**Start to collate:** Portfolio of Evidence during the on-programme period of the apprenticeship

Gateway Process	Evidence & Forms
Employer • Must be content that the apprentice is working at or above the Occupational Standard • Confirms the apprentice has the evidence required to pass Gateway and is ready to take EPA • Identifies and agrees on a suitable project with the apprentice to start post-Gateway • Reviews evidence to confirm that it is appropriate and sufficient to meet the KSBs • Ensures the apprentice has the time and resources to plan and complete their project after Gateway.	**Signs and dates:** Declaration of Authenticity Form – Portfolio of evidence

Apprentice
• Must have been on programme for a minimum of 12 months
• Submits to provider a **Portfolio, Declaration of Authenticity Form – Portfolio and Evidence Reference Matrix – Portfolio of Evidence Form**
• Submit any policies and procedures as requested by City & Guilds (if applicable)
• Notifies City & Guilds, before the EPA date, of any technical requirements for the presentation. During the presentation, the apprentice must have access to:
  ○ audio-visual presentation equipment
  ○ flip chart, and writing and drawing materials
  ○ computer.
• Identifies and agrees on a suitable project with the employer to start after Gateway
• Notes that City & Guilds will confirm when all Gateway requirements have been approved. The apprentice **must not** start their project until the Project Title and the Scoping document has been approved by an IEPA following Gateway approval.
	Signs and dates:
	Apprentice Gateway Declaration Form
	Declaration of Authenticity Form – Portfolio of evidence
	
	Submits to provider:
	Apprentice Gateway Declaration Form
	Declaration of Authenticity Form – Portfolio of evidence
	Fully completed Evidence Reference Matrix – Portfolio of Evidence Form (or an alternative)
	Portfolio (which will typically contain 12 discrete pieces of evidence)
	Project Scoping document
	Complete on EPA Pro:

Gateway Process	Evidence & Forms
	EPA Pro Gateway Declaration
Provider – on EPA Pro • Completes all Gateway questions on EPA Pro, providing preferred assessment dates while adhering to booking lead times and defined project timescales • Makes City & Guilds aware of any additional needs of the apprentice so that they can review reasonable adjustments; see the current policy on the City & Guilds website, under EPA Documents Library • Must notify City & Guilds, before the EPA date, of any technical requirements for the presentation on behalf of the apprentice • Completes Employer Gateway Approval Declaration on EPA Pro **on behalf of the employer** • Uploads evidence and forms onto EPA Pro.	**Complete on EPA Pro:** EPA Pro Gateway Declaration **Signs and dates:** Declaration of Authenticity Form – Portfolio of evidence **Uploads onto EPA Pro:** Apprentice Gateway Declaration Portfolio of evidence Declaration of Authenticity Form – Portfolio of evidence Fully completed Evidence Reference Matrix – Portfolio of Evidence Form (or an alternative)
City & Guilds EPA Gateway Team • Formally confirms when all the Gateway requirements have been met.	N/A
IEPA • Checks portfolio of evidence has been submitted • Checks Evidence Reference Matrix – Portfolio of Evidence Form (or an alternative) has been uploaded • Reviews the Project scoping document and provides feedback via EPA Pro within 5 working days of allocation acceptance. Feedback will identify whether the project can be commenced or if a further Scoping document is required.	Use the Evidence Return Form if there are any issues within the Evidence Reference Matrix or Portfolio. If evidence is not uploaded to EPA Pro the Events Team should be notified to liaise with the training provider.

Gateway Process	Evidence & Forms

City & Guilds EPA Team
• Assigns an apprentice to an IEPA
• Advises the provider that the Project Title and Scoping document feedback is available to view via EPA Pro.
• Agrees with the provider and IEPA on a mutually convenient date for the EPA events
• The apprentice must notify City & Guilds, before the EPA date, of any technical requirements for the presentation. During the presentation, the apprentice must have access to:
  ○ audio-visual presentation equipment
  ○ flip chart, and writing and drawing materials
  ○ computer.
	N/A

End-point Assessment	Evidence & Forms

Apprentice
• Notes that the project must be in the form of a report and have a word count of 2500 words (tolerance of 10% above or below at the discretion of the apprentice)
• Submits the Written Project report **by the end of week 12** of the EPA period
• Submits the Presentation, speaker notes and supporting materials **by the end of week 12** of the EPA period
• Must notify City & Guilds, before the EPA date, of any technical requirements for the presentation. During the presentation, the apprentice must have access to:
  ○ audio-visual presentation equipment
  ○ flip chart, and writing and drawing materials
  ○ computer.
	Signs and dates:
	Declaration of Authenticity Form – Project Report/Presentation
	Submits to provider:
	Presentation materials
	Written Project report
	Evidence Reference Matrix – Project Report
	Declaration of Authenticity Form – Project Report/Presentation

End-point Assessment	Evidence & Forms
• Remembers that the IEPA **must have at least 2 weeks (10 working days) to review the project report and presentation materials** • Completes the End-point Assessment • Notes that the assessment methods can be delivered in any order.	
Employer • Ensures the apprentice has access to the resources required for the assessments (see the Resources section).	**Signs and dates:** Declaration of Authenticity Form – Project Report/Presentation **Submits to provider:** Declaration of Authenticity Form – Project Report/Presentation

End-point Assessment	Evidence & Forms
Provider • Completes all Gateway questions on EPA Pro, providing preferred assessment dates while adhering to booking lead times and defined project timescales • Reviews feedback provided for Project Title and Scoping document and when approval is received, advises the apprentice that they may commence their project and the timeline in which this should be completed: at least 2 weeks (10 working days) before the EPA date, or at the end of the Project Timescale period (whichever is earliest).	**Uploads onto EPA Pro:** Presentation materials Project Report Evidence Reference Matrix – Project Report Declaration of Authenticity Form – Project Report/Presentation
IEPA • Reviews the apprentice's portfolio of evidence, Project Report and presentation, speaker notes and supporting materials prior to EPA event	**Completes:** IEPA Recording Forms Feedback Form

End-point Assessment	Evidence & Forms
• Prepares questions for both assessment methods, referring to the question bank guidance in the IEPA EPA Pack • Carries out End-point Assessment • Marks each assessment and fully completes the Recording Forms and Feedback Form, and communicates the results to the LIEPA • Uploads all documentation to EPA Pro and awards grades.	
LIEPA • Samples and quality-assures assessments • Confirms overall grade on EPA Pro and publishes the results.	**Reviews:** IEPA Recording Forms Feedback Form
City & Guilds EPA Team • Communicates the results to the provider via EPA Pro • Processes the overall result if the apprentice has passed all the assessments and advises Skills England, who issues the certificate. The data will be provided to Skills England, once a month, on the fourth working day of the month.	N/A

Summary timescales

Readers should check the above Timetable and the Assessment Instruction sections of this document for the detailed requirements for each stage.

Further information on EPA Service Timelines can be found on www.cityandguilds.com

On programme	Enrol apprentice on EPA Pro, including 'Expected Date Ready for EPA. Collate portfolio of evidence. Work towards English and maths, if not yet achieved. Employer and apprentice to begin the process to identify and agree the project to be undertaken.

Gateway process	Provider submits evidence & forms on EPA Pro. Apprentice must have achieved English and maths qualifications in line with the apprenticeship funding rules. Apprentice submits portfolio of evidence. Apprentice submits Evidence Reference Matrix – Portfolio of evidence form. Signed and dated Declaration form – Portfolio of evidence. Apprentice submits Project scoping document. Note: The apprentice only starts the project once the project scoping document has been approved (post Gateway)
Gateway	Assessment components can only be booked after Gateway has been approved.
End-point Assessment **Typically, 12 weeks after Gateway requirements have been met**	
Planning meeting	Planning meeting (optional) a minimum of ten working days after Gateway
Written project report with presentation and questioning	Submits the Project Report by the end of week 12 of the EPA period. Submits Presentation materials by the end of week 12 of the EPA period. Apprentice/Employer must notify City and Guilds at this point if any technical requirements are needed for the presentation at EPA.
Interview underpinned by portfolio of evidence	The Independent End-point Assessor must have at least 2 weeks (10 working days) to review the Project Report and Presentation materials before the EPA date. What must be uploaded. Project Report, Presentation, Evidence Reference Matrix – Project Report (in annex of the Project Report) and Project Report/Presentation Declaration of Authenticity form uploaded by the end of week 12 of the EPA period and at least 2 weeks (10 working days) before the EPA date for the IEPA to review.
End-point assessment completed	

5. End-Point Assessment Resources

Assessment Method	Resources Required
Beginning of EPA	Photo ID will be required as proof of identification to the IEPA at the start of the EPA.
	There should be access to water and cups.
Written Project report with presentation with questioning	When the presentation is submitted, at the end of week 12 of the EPA, the apprentice/provider must notify City & Guilds before the EPA of any technical requirements for the presentation. The apprentice should have access to: • audio-visual presentation equipment • flip chart, and writing and drawing materials • computer. The apprentice must deliver the presentation to the IEPA on a one-to-one basis.
	The presentation must take place in a suitable venue, in a quiet room, free from distractions and influence. This can be on or off the employer's premises.
	It can be conducted by video conferencing. City & Guilds have processes in place to verify the identity of the apprentice and ensure that the apprentice is not being aided.
	Internet access and suitable equipment for remote assessment, such as a computer with audio and video capacity should be provided, as outlined in the City & Guilds Manual for the End-point Assessment Service.

Assessment Method	Resources Required
Interview underpinned by a portfolio of evidence	The interview must take place in a suitable venue, in a quiet room, free from distractions and influence. This can be on or off the employer's premises. It can be conducted by video conferencing. City & Guilds have processes in place to verify the identity of the apprentice and ensure the apprentice is not being aided.
	Internet access and suitable equipment for remote assessment, such as a computer with audio and video capacity should be provided, as outlined in the City & Guilds Manual for the End-point Assessment Service.
	The apprentice and the IEPA must each have a copy of the apprentice's portfolio of evidence to refer to.

6. Assessment Instructions: 9610-700 Written Project Report with Presentation and Questioning

Assessment Specification

Description	Coverage	Grade
Written project report with presentation and questioning	Knowledge: K2, K3, K6, K11, K14, K17 K18, K19, K20 Skills: S1, S2, S3, S4, S5, S7, S12, S13, S14, S16, S17 Behaviours: B1, B2, B4	X/P/D

Generic Specification

Overview

The apprentice must complete a project that aligns with the criteria for this assessment method. The project should follow a multi-channel approach to the planning, delivery and evaluation of a marketing campaign and have a real business application and benefit.

The project must meet the needs of the employer's business and be relevant to the apprentice's occupation and apprenticeship.

The research and written project report must start after the apprentice has gone through the Gateway.

This assessment method includes two components:

- project with a project output
- presentation with questions and answers.

Together, these components give the apprentice the opportunity to demonstrate the KSBs mapped to this assessment method. The written project report and any components must be assessed holistically by the IEPA when they are deciding the grade for this assessment method.

Rationale

This assessment method is being used because:

- The written project report is the most valid method as it allows the demonstration of professional competence. The written project report will contribute to the employer's business and be part of the apprentices' everyday work, ensuring that they can demonstrate KSBs in practice. Producing a written project report reflects normal practice in the workplace for multi-channel marketers, so this assessment method is appropriate.
- It is a significant and complex piece of work that thoroughly tests both higher and lower order knowledge and skills.
- Note that it is essential that the written project report articulates the apprentice's own work practice rather than the activities performed by the team of which they were a part.
- The purpose of the questions is to verify that the activity was completed by the apprentice and seek clarification where required. It will also assess those KSBs that the apprentice did not have the opportunity to demonstrate with the report, although

these should be kept to a minimum and assess the level of competence against the grading descriptors.

Remote Assessment

Remote assessment is live assessment that is supported by technology where the IEPA and the apprentice are not in the same physical location when the assessment takes place.

For more detailed information around the conditions and requirements that must be met for remote assessment, please refer to the IEPA Manual.

Provider & Employer Instructions 9610-700 Written Project report with Presentation and Questioning

Component 1 – Written project report

The project assessment component is aimed at apprentices working in a multi-channel marketing role.

A written project report involves the apprentice completing a significant and defined piece of work that has a real business application and benefit. It must meet the needs of the employer's business and be relevant to the apprentice's occupation and apprenticeship. The project, including any research, and the project report must start after Gateway. The apprentice must complete and submit the word-processed report to City & Guilds **by the end of week 12** of the EPA period.

The apprentice may work as part of a team; however, the written project report must be the apprentice's own work and will reflect their own role and contribution to the project. Note that it is essential that the written project report articulates the apprentice's own work practice rather than the activities performed by the team of which they were part. When the project is submitted, the apprentice and their employer must confirm that the report is the apprentice's own work.

The written project report must be structured to give the apprentice the opportunity to demonstrate the KSBs mapped to this assessment method, to the highest available grade. The criteria covered by this assessment method are:

- Marketing methods, principles, and practices **–** K6, K17, S2
- Business and organisation **–** K2, K3
- Communication and copywriting **–** K14, S5, S7, B4,
- Campaign management **–** K11, K18, K19, K20, S1, S3, S16, S17, B1, B2
- IT and digital **–** S4, S12, S13, S14.

The report must address the knowledge, skills and behaviours for this assessment method, and a suggested approach to the layout could include:

- an executive summary (or abstract)
- an introduction
- the scope of the project (including key performance indicators)
- objectives
- research and methodology
- approach taken and risks to consider
- financial budgeting and resources
- discussion of findings
- outcomes and impact of the project implemented
- measure of success
- recommendations and conclusions

- appendix containing mapping of KSBs to the report.

Examples of the types of projects an apprentice could submit, include the following.

The examples below have been provided to assist the employer and apprentice in their selection of a suitable project of an appropriate size and complexity, sufficient to cover the KSBs assigned to this assessment method.

Example 1 – Community event promotion	The apprentice has been tasked with promoting a community event. Whilst everyone is welcome at the event, the organisers want to focus on increasing the number of young people attending. Through research, the apprentice must identify the most effective strategies to reach the target audience. The apprentice should consider offline and online strategies. Following the research, the apprentice must implement the strategies, monitor ongoing results and make any adjustments needed. At the end of the project the apprentice must measure the effectiveness of their strategies. On completion of the work, and within a maximum of 12 weeks, the apprentice must submit a written report of 2,500 words.
Example 2– Website engagement	The apprentice has been tasked with improving traffic rates to an organisation's website. Through research, the apprentice must identify the most effective strategies to achieve this. The apprentice should consider offline and online strategies. Following the research, the apprentice must implement the strategies, monitor ongoing results and make any adjustments needed. At the end of the project the apprentice must measure the effectiveness of their strategies. On completion of the work, and within a maximum of 12 weeks, the apprentice must submit a written report of 2,500 words.
Example 3 – New product launch	The apprentice has been asked to create a campaign for a new product launch. The apprentice will need to research and implement a plan for the new product launch. The apprentice should consider offline and online strategies. Following the research, the apprentice must implement the strategies, monitor ongoing results and adjust the campaign as necessary. At the end of the project the apprentice must measure the effectiveness of their strategies.

On completion of the work, and within a maximum of 12 weeks, the apprentice must submit a written report of 2,500 words.

In addition to the example Project Titles above, the following may further assist the employer and apprentice in their selection of a suitable work-based project.

- Plan and deliver a social media campaign across different channels, targeting new customers, which drives traffic to the website to provide a discount code for a customer's first purchase.
- Use email marketing software to contact existing customers to promote a new collaboration with an influencer, supported by offline marketing promotions such as leaflets. Analyse and evaluate the different elements of the campaign to make overall recommendations for the future.
- Analyse and evaluate a multi-channel marketing campaign that has previously taken place. Identify any strengths or weaknesses and use these to deliver a similar campaign, then evaluate the campaign performance.

Project Requirements

The apprentice's project should be submitted in the form of a word-processed report. The report should contain clear explanation of the tasks carried out and relevant associated visual infographics.

The written project report has a maximum word count of 2,500 words. A tolerance of 10% above or below the word count is allowed at the apprentice's discretion. Appendices, references and diagrams are not included in this total. The project report must map, **in an appendix**, how it evidences the relevant KSBs mapped to this assessment method.

Important Note

Project Report – Word Count Requirement

The specified word count requirement of 2,500 words (plus or minus 10%) means the completed report must include at least 2,250 words and no more than 2,750 words (including headings). The accurately calculated word count for each report **must** be recorded in the 'word count' box at the top of the **Evidence Reference Matrix – Project Report** Form (located in the 9610-12 Provider and Employer Recording Form Pack), submitted to EPA Pro.

Apprentices, employers and providers are reminded that any report submitted with a word count outside these requirements, or submitted without showing an accurately calculated total word count, will be dealt with as follows.

- Reports submitted with fewer than 2,250 accurately calculated words will be assessed as submitted; there is no specific penalty for failing to meet the minimum word count requirement. However, apprentices are reminded that this shortfall is likely to reduce their opportunity to pass and achieve a higher grade.
- Reports submitted with more than 2,750 accurately calculated words will be assessed as submitted. However, the IEPA will only consider the first 2,750 words and not assess any content beyond this limit against the grading criteria. There is no specific penalty for exceeding the maximum word count requirement; however, apprentices are reminded that this is likely to reduce their opportunity to pass and achieve a higher grade, especially where project outcomes and conclusions are included towards the end of the submitted report.

City & Guilds have provided an **Evidence Reference Matrix Form – Project Report** in the **Provider Employer Recording Forms** for apprentices to use for this assessment. To facilitate comprehensive, consistent mapping of the evidence requirements, use of the City & Guilds supplied form is strongly recommended. The accurately calculated word count for each report **must** be recorded in the 'word count' box at the top of the Evidence Reference Matrix – Project Report Form.

The apprentice and/or training provider may choose to use their own version of the Evidence Reference Matrix Form, but the form must:

- clearly map evidence to the KSBs
- record the accurately calculated word count for the report.

When submitting the written project report, the apprentice and their employer must confirm that the report is the apprentice's own work. City & Guilds have provided a '**Declaration of Authenticity'** form for this purpose in the **Provider & Employer Recording Forms Pack.**

Component 2 – Presentation with Questions

City & Guilds must give the apprentice **at least 2 weeks'** notice of the presentation with questioning.

The presentation with questions must be structured to give the apprentice the opportunity to demonstrate the KSBs mapped to this assessment method to the highest available grade.

The apprentice must prepare and deliver a presentation to an IEPA. After the presentation, the IEPA must ask the apprentice questions about their project, report and presentation.

The presentation will provide an overview of the apprentice's project and the presentation with questions and answers. The IEPA must ask questions after the presentation.

The presentation should cover:

- an overview of the project
- the project scope (including key performance indicators)
- summary of actions undertaken by the apprentice
- project outcomes and how these were achieved.

The presentation can be in any format. Materials for submission may include, but are not limited to, slides, speaker notes, posters, videos, sound recordings, animations, diagrams, etc.

The apprentice must prepare and submit their presentation to City & Guilds at the same time as the report, which is **by the end of week 12** after Gateway.

In order to validate the information contained in the report, the questions generated by the IEPA should be specific to the outcomes covered by the project that has been submitted by the apprentice. The IEPA **must ask at least 6 questions**. They must use the questions from City & Guilds' question bank or create their own questions in-line with City & Guilds' training. Follow up questions are allowed where clarification is required.

If the apprentice has not evidenced all the required outcomes (KSBs) in their Written Project report and the presentation, the IEPA must ask appropriate questions to draw out this information.

The purpose of the IEPA's questions is:

- to verify that the activity was completed by the apprentice
- to seek clarification where required
- to assess those KSBs that the apprentice did not have the opportunity to demonstrate with the report, although these should be kept to a minimum
- to assess level of competence against the grading descriptors

The apprentice and the IEPA to each have a copy of the apprentice's report to refer to. The IEPA should ensure that the apprentice is aware of being recorded.

Timing

The presentation with questioning must last **45 minutes**. This will typically include:

- a presentation of **20 minutes**
- questioning lasting **25 minutes**.

The IEPA can increase the total time of the presentation and questioning by up to 10%. This time is to allow the apprentice to complete their last point or respond to a question if necessary. The IEPA must use the full time available for questioning.

Assessment Environment

The employer and provider should ensure that the location of an assessment is prepared for the individual assessment activities and that any equipment and/or resources are available for the apprentice to use.

The presentation with questioning must take place in a suitable, quiet venue, free from distractions and influence; this can be on or off the employer's premises. The presentation with questioning can be conducted by video conferencing. The IEPA must ask for photo identification from the apprentice to ensure appropriate measures are in place to prevent misrepresentation and ensure that the apprentice is not aided in any way.

Internet access and suitable equipment for remote assessment, such as a computer with audio and video capacity is required.

Assessment Decision

The IEPA must make the grading decision. They must assess the project components holistically when deciding the grade.

Note: presentation skills are not assessed.

The IEPA must keep accurate records of the assessment. They must record:

- the KSBs demonstrated in the report and presentation with questions
- the apprentice's answers to questions
- the grade achieved.

Grading

The written project report with presentation and Questioning will be graded Fail, Pass or Distinction. The City & Guilds IEPA will allocate the grade using the ‘Grading criteria’ table provided.

The results will not be shared with the apprentice on the day of the assessment.

Project Report/Presentation Checklist

An ‘Apprentice Project Report / Presentation Checklist’ has been created to help the apprentice and the provider/employer ensure that all relevant information is accounted for. The checklist can be located in the **Provider & Employer Recording Forms Pack.**

Apprentice Instructions – 9610-700 Written Project Report with Presentation and Questioning

Component 1 – Project with a Project Output

You will conduct research and submit a project in the form of a written project report. The project will be compiled **only after** you have gone through the Gateway process and the Project Title and Scoping document has been approved.

Your project should follow a multi-channel approach to the planning, delivery and evaluation of a marketing campaign and have a real business application and benefit. The aim of this project is to show evidence of your work that reflects relevant working practices for your role, meets the requirements of the employer's organisation and allows the relevant KSBs to be demonstrated for this method of assessment to the highest available grade.

Project Requirements

Your project should be submitted in the form of a word-processed report. The report should contain clear explanation of the tasks carried out and relevant associated visual infographics.

The report must address the knowledge, skills and behaviours for this assessment method, and a suggested approach to the layout could include:

- an executive summary (or abstract)
- an introduction
- the scope of the project (including key performance indicators)
- objectives
- research and methodology
- approach taken and risks to consider
- financial budgeting and resources
- discussion of findings
- outcomes and impact of the project implemented
- measure of success
- recommendations and conclusions
- appendix containing mapping of KSBs to the report.

City & Guilds have provided examples of project titles and detailed guidance on the project requirements to enable you and your employer to select a suitable project that will meet the requirements of the assessment plan.

These example titles are provided for guidance; other project titles may also be suitable if they meet the requirements of the KSBs assigned to this assessment method.

Examples of the types of projects you could submit, include the following.

Example 1 – Community event promotion	You have been tasked with promoting a community event. Whilst everyone is welcome at the event, the organisers want to focus on increasing the number of young people attending. Through research, you must identify the most effective strategies to reach the target audience. You should consider offline and online strategies. Following the research, you must implement the strategies, monitor ongoing results and make any adjustments needed. At the end of the project, you must measure the effectiveness of their strategies. On completion of the work, and within a maximum of 12 weeks, you must submit a written report of 2,500 words.
Example 2– Website engagement	You have been tasked with improving traffic rates to an organisation's website. Through research, you must identify the most effective strategies to achieve this. You should consider offline and online strategies. Following the research, you must implement the strategies, monitor ongoing results and make any adjustments needed. At the end of the project, you must measure the effectiveness of their strategies. On completion of the work, and within a maximum of 12 weeks, you must submit a written report of 2,500 words.
Example 3 – New product launch	You have been asked to create a campaign for a new product launch. You will need to research and implement a plan for the new product launch. You should consider offline and online strategies. Following the research, you must implement the strategies, monitor ongoing results and adjust the campaign as necessary. At the end of the project, you must measure the effectiveness of their strategies. On completion of the work, and within a maximum of 12 weeks, you must submit a written report of 2,500 words.

In addition to the example Project Titles above, the following may further assist your employer and you in your selection of a suitable work-based project.

- Plan and deliver a social media campaign across different channels, targeting new customers, which drives traffic to the website to provide a discount code for a customer's first purchase.
- Use email marketing software to contact existing customers to promote a new collaboration with an influencer, supported by offline marketing promotions such as leaflets. Analyse and evaluate the different elements of the campaign to make overall recommendations for the future.
- Analyse and evaluate a multi-channel marketing campaign that has previously taken place. Identify any strengths or weaknesses and use these to deliver a similar campaign, then evaluate the campaign performance.

You will have a **maximum of 12 weeks** to complete the report. You may work as part of a team, but the report must be your own work and reflect your role and contribution.

The written project report has **a maximum word count of 2,500 words** (including headings). A tolerance of plus or minus 10% is allowed at your discretion. Appendices, references and diagrams are not included in this total.

Important Note

Project Report – Word Count Requirement

The specified word count requirement of 2,500 words (plus or minus 10%) means the completed report must include at least 2,250 words and no more than 2,750 words (including headings). The accurately calculated word count for each report **must** be recorded in the 'word count' box at the top of the **Evidence Reference Matrix – Project Report** Form (located in the 9610-12 Provider and Employer Recording Form Pack), submitted to EPA Pro.

Apprentices, employers and providers are reminded that any project report submitted with a word count outside these requirements, or submitted without showing an accurately calculated total word count, will be dealt with as follows.

- Reports submitted with fewer than 2,250 accurately calculated words will be assessed as submitted; there is no specific penalty for failing to meet the minimum word count requirement. However, apprentices are reminded that this shortfall is likely to reduce their opportunity to pass and achieve a higher grade.
- Reports submitted with more than 2,750 accurately calculated words will be assessed as submitted. However, the IEPA will only consider the first 2,750 words and not assess any content beyond this limit against the grading criteria. There is no specific penalty for exceeding the maximum word count requirement; however, apprentices

are reminded that this is likely to reduce their opportunity to pass and achieve a higher grade, especially where project outcomes and conclusions are included towards the end of the submitted report.

Your provider must submit your project report and presentation materials to City & Guilds **by the end of week 12 of the EPA Period**. At this point, you must notify City & Guilds of any technical requirements for the presentation; you must have access to:

- audio-visual presentation equipment
- flip chart, and writing and drawing materials
- computer
- any other requirements as previously notified to City & Guilds.

Authenticating your Work when Submitting the Written Project Report and Presentation

The evidence provided in the Written Project report and Presentation must be valid and attributable to yourself. The Project Report/Presentation **must** contain a statement from the employer and you confirming this. City & Guilds have provided a '**Declaration of Authenticity'** form for this purpose in the **Provider & Employer Recording Forms Pack.**

The project report must map, **in an appendix**, how it evidences the relevant KSBs for this assessment method. City & Guilds have provided an **Evidence Reference Matrix Project Form** for the project report in the **Provider Employer Recording Forms** for apprentices to use for this assessment. To facilitate comprehensive, consistent mapping of the evidence requirements, use of the City & Guilds supplied form is strongly recommended. The accurately calculated word count for each report **must** be recorded in the 'word count' box at the top of the Evidence Reference Matrix – Project Report Form.

You and/or the training provider may choose to use your own version of the Evidence Reference Matrix Form, but the form must:

- clearly map evidence to the KSBs
- record the accurately calculated word count for the project report.

City & Guilds must give you at least 2 weeks' notice of the presentation with questioning.

Component 2 – Presentation with Questioning

This component will take form of a presentation, presented by you. The IEPA will ask you questions after the presentation. The purpose of the IEPAs questions will be to explore

elements of the project report and presentation to test competence in the KSBs mapped to this assessment method.

The presentation must include:

- an overview of the project
- the project scope (including key performance indicators)
- summary of actions undertaken by the apprentice
- project outcomes and how these were achieved.

The presentation can be in any format. Materials for submission may include, but are not limited to, slides, speaker notes, posters, videos, sound recordings, animations, diagrams, etc.

The IEPA **must ask at least 6 questions** after the presentation. Follow up questions are allowed where clarification is required.

You and the IEPA should each have a copy of your project report to refer to. The IEPA should ensure you are aware of being recorded.

Timing

The presentation with questioning must last **45 minutes**. This will typically include:

- a presentation of **20 minutes**
- questioning lasting **25 minutes**.

The IEPA can increase the total time of the presentation and questioning by up to 10%. This time is to allow you to complete your last point or respond to a question if necessary. The IEPA must use the full time available for questioning.

Assessment Environment

Your employer and provider should ensure that the location of an assessment is prepared for the individual assessment activities, and that any equipment and/or resources are available for you to use.

The presentation with questions must take place in a suitable, quiet venue, free from distractions and influence; this can be on or off the employer's premises.

The presentation with questioning can be conducted by video conferencing. The IEPA must ask you for photo identification to ensure appropriate measures are in place to prevent misrepresentation and ensure that you are not aided in any way.

Internet access and suitable equipment for remote assessment, such as a computer with audio and video capacity is required.

Grading

The written project report with Presentation and questioning will be graded Fail, Pass or Distinction. The City & Guilds IEPA will allocate the grade using the 'Grading criteria' table provided.

The results will not be shared with you on the day of the assessment.

Project Report/Presentation Checklist

An 'Apprentice Project Report / Presentation Checklist' has been created to help you and your provider/employer ensure that all relevant information is accounted for. The checklist can be located in the **Provider & Employer Recording Forms Pack.**

You do **not** need to submit a completed 'checklist' to City & Guilds.

7. Assessment Instructions: 9610-701 Interview Underpinned by Portfolio of Evidence

Assessment Specification

Description	Coverage	Grade
Interview underpinned by portfolio of evidence	Knowledge: K1, K4, K5, K7, K8, K9, K10, K12, K13, K15, K16, K21, K22, K23 Skills: S6, S8, S9, S10, S11, S15, S18 Behaviour: B3, B5, B6	X/P/D

Generic Specification

In the interview, the IEPA asks the apprentice questions. It gives the apprentice the opportunity to demonstrate the KSBs mapped to this assessment method.

The apprentice can refer to and illustrate their answers with evidence from their portfolio of evidence.

Rationale

This assessment method is being used because:

- it allows the apprentice to be assessed against KSBs that may not naturally occur as part of a work-based project
- it allows the apprentice to show case their depth of understanding relating to the KSBs
- it allows the independent assessor to consider the context and sector that the apprentice operates within, giving flexibility to ensure that all the KSBs can be assessed appropriately
- it is cost effective, and it allows consideration of the potential need to conduct the EPA remotely.

Remote Assessment

Remote assessment is live assessment that is supported by technology where the IEPA and the apprentice are not in the same physical location when the assessment takes place.

For more detailed information around the conditions and requirements that must be met for remote assessment please refer to the IEPA Manual.

Provider & Employer Instructions

Portfolio of evidence

The apprentice must prepare a portfolio of evidence during the on-programme phase of their apprenticeship. The apprentice must submit the portfolio electronically in line with City & Guilds requirements at Gateway; the portfolio must contain sufficient evidence to demonstrate the knowledge, skills and behaviours (KSBs) assigned to this assessment method. Evidence contained in the portfolio must be clearly mapped against the KSBs.

Evidence to be uploaded for the EPA as follows:

- Portfolio of evidence
- A completed '**Declaration of Authenticity**' form must accompany the portfolio
- A completed '**Evidence Reference Matrix – Portfolio of Evidence**' form (located in the **Provider & Employer Recording Forms** Pack) or alternative form.

The apprentice must submit any policies and procedures as requested by City & Guilds.

The submission of a fully completed '**Evidence Reference Matrix – Portfolio of Evidence**' form (or alternative form) is mandatory. Failure to do so means that the IEPA will return the portfolio without it being reviewed.

In the case where evidence has been referenced in the '**Evidence Reference Matrix – Portfolio of Evidence**' form (or alternative form) but is not present within the portfolio, the IEPA will request the missing evidence from the provider/employer.

The portfolio will be reviewed by the IEPA. Whilst the evidence in the portfolio is **not** graded by the IEPA, it will be used to guide the interview. The IEPA is not required to provide feedback after their review of the portfolio.

The IEPA will have at least 2 weeks (**10 working days)** before the EPA to review the contents of the portfolio to **generate appropriate questions** before the interview takes place.

Portfolio of evidence requirements

The portfolio should meet the following requirements:

- The portfolio should only contain evidence related to the KSBs that will be assessed by the interview.
- The evidence will typically contain **12** discrete pieces of evidence.
- Evidence should be mapped against the KSBs for this assessment method, using the '**Evidence Reference Matrix – Portfolio of Evidence**' form provided in the **Provider & Employer Recording Forms** Pack, or alternative form. The apprentice may

choose to use their own version of the Evidence Reference Matrix, providing it clearly maps evidence to the KSBs.
- Evidence may be used to demonstrate more than one KSB; a qualitative as opposed to quantitative approach is suggested.

Evidence sources may include:

- workplace documentation and records, for example:
  - workplace policies and procedures
  - witness statements
  - annotated photographs
  - video clips (maximum total duration 5 minutes); the apprentice must be in view and identifiable.

This is not a definitive list; other evidence sources can be included. The portfolio of evidence should **not** include reflective accounts or any methods of self-assessment.

Any employer contributions should focus on direct observation of performance (for example, witness statements) rather than opinions. The evidence provided should be valid and attributable to the apprentice; the portfolio of evidence should contain a statement from the employer and apprentice confirming this.

All evidence must be of the apprentice's own work. For any teamwork included in the portfolio, the evidence must clarify and focus only on the apprentice's contribution.

Where necessary, confidentiality and data protection requirements must be adhered to, eg permissions for use of video/images containing identifiable third parties (such as clients), anonymisation of documentation and permissions from clients when submitting items commissioned by them.

All the evidence submitted must be in a format that can be opened by the IEPA. EPA Pro accepts evidence in the form of Word documents, MP3 and MP4 files. Individual file size cannot exceed 250MB. Where evidence cannot be opened, eg evidence that is linked to an e-Portfolio or embedded within a document, the portfolio will be returned without it being reviewed.

Selecting Evidence

Before selecting the evidence for the portfolio of evidence, the apprentice should review the assessment requirements in the Standard to ensure:

- that only evidence relevant to the Standard is used
- the criteria to be covered by the portfolio of evidence
- the type of evidence that can be presented (see above)

- the amount of evidence that should be presented.
- the time period from which the evidence should have originated.

To assemble their portfolio of evidence, the apprentice should consider all the evidence they have available that shows they have met the requirements being assessed. Evidence collected towards the end of their Apprenticeship programme, as they become independent in their work, is likely to provide the most holistic evidence, i.e. covering several criteria at once.

From this, they should select evidence that **most efficiently** meets all the relevant criteria, and which demonstrates their **best performance**. While there may be some overlap between the evidence collected, multiple pieces of evidence showing coverage of the same criteria should not normally be submitted for End-point assessment.

There are two questions that an apprentice should consider when selecting work to form their portfolio of evidence:

1. Which pieces holistically (most efficiently) give evidence that together cover all the relevant KSBs?
2. Is this the **best** evidence I have, showing that I have met all the requirements for the higher grade?

Confirming the Evidence Selection

When the apprentice has selected the evidence to form their portfolio of evidence, this must be reviewed by the provider/employer to ensure:

- All assessment requirements have been met.
- There is no unnecessary duplication of evidence against the same criteria.
- The work selected represents the best evidence available in relation to grading requirements.
- The clarity of any images or scanned evidence is sufficient to determine the quality of the original evidence.
- Authenticity of evidence has been established.

The EPA provider/employer is responsible for providing guidance to the apprentice on compiling the portfolio of evidence whilst on programme and this is to be reviewed by the EPA provider/employer prior to triggering EPA. The employer should provide suitable work for the apprentice to apply themselves to and discuss at interview.

The EPA provider/employer is responsible for the review of the portfolio of evidence and if it does not contain sufficient evidence to meet the Standard then it will be deemed not yet ready to submit. The apprentice must be advised by the employer/mentor about the shortfalls in evidence and how this can be addressed.

A portfolio of evidence checklist has been provided to support the provider, employer and the apprentice in the submission of the documentation.

Preparing Evidence for Submission

Evidence being uploaded for EPA must be presented as follows:

- Evidence must have a header on each page containing the name and e-signature of the apprentice together with the date the evidence was produced. Each piece of evidence must be referenced to the criteria it is being submitted against.
- Along with the City & Guilds Portfolio of Evidence Header and Declaration Form which must be completed to:
    - Cross-reference each piece of evidence to the relevant KSBs.
    - Formally declare the authenticity of all evidence.

The apprentice must have access to the portfolio of evidence before and during the interview. The apprentice will use the portfolio of evidence to support them in demonstrating their knowledge, skills and behavioural understanding and can use it to provide tangible evidence, backing-up their accounts of their work during the interview.

The portfolio of evidence is not directly assessed but is used as the basis for the interview. The evidence in the portfolio of evidence will not be judged or marked by the IEPA. The IEPA uses the portfolio of evidence to familiarise themselves with the apprentice's work and to base the questions on in preparation for the interview.

Submission to City & Guilds

The EPA provider/employer must submit the portfolio of evidence. The apprentice is required to complete the relevant sections in the **Portfolio of Evidence Header and Declaration Form.** The work evidenced in the portfolio of evidence must have been carried out by the apprentice.

The EPA provider/employer will review the portfolio of evidence to ensure it meets the requirements. The EPA provider/employer will then sign the **Portfolio of Evidence Header and Declaration Form**.

Once the **Portfolio of Evidence Header and Declaration Form** has been signed by all parties, the following documents must be uploaded to the City & Guilds EPA Portal.

The documents that must be sent are:

- The completed portfolio of evidence.
- The completed Portfolio of Evidence Header and Declaration Form.

Refer to the **Provider & Employer Recording Forms** pack for guidance on how to complete these forms.

Authenticating the Apprentice's Work When Submitting the Portfolio

The evidence provided in the portfolio must be valid and attributable to the apprentice. The portfolio **must** contain a statement from the employer and apprentice confirming this. City & Guilds have provided a '**Declaration of Authenticity'** form for this purpose in the **Provider & Employer Recording Forms** Pack.

Assessment Environment

The interview should take place in a quiet room, free from distractions and influence. This can be on or off employer's premises. The interview between apprentice and IEPA usually takes place remotely via online video conferencing, providing the conditions and requirements for remote assessment are met.

The IEPA must ask for photo identification from the apprentice and ensure appropriate measures are in place to prevent misrepresentation and ensure that the apprentice is not aided in any way.

The interview

City & Guilds must give the apprentice at least 7 days' notice of the interview.

The IEPA will conduct and assess the interview. It must be structured to give the apprentice the opportunity to demonstrate the KSBs mapped to this assessment method to the highest available grade.

The purpose of the IEPAs questions will be to explore the apprentices 's competence across a range of KSB statements, using portfolio evidence to illustrate their responses.

The IEPA must ask **at least 6 questions**. The questions must be unpredictable. IEPA may ask follow-up questions where clarity is required. The IEPA must use the City & Guilds Question Bank or use them as reference to generate their own contextualised questions for the interview.

Timings

The interview must last **60 minutes**. The IEPA can increase the time of the interview by up to 10%. This time is to allow the apprentice to respond to a question if necessary.

The IEPA must use the full time available for questioning to allow the apprentice the opportunity to evidence occupational competence at the highest level available unless the apprentice has already achieved the highest grade available.

Grading

The interview will be graded Fail, Pass or Distinction. The City & Guilds IEPA will allocate the grade using the ‘Grading criteria’ table provided.

Grading Instructions

The IEPA is responsible for making the grading decision. The results should not be shared with the apprentice on the day of the assessment.

Recording Forms

City & Guilds have designed specific IEPA Recording Forms for this Apprenticeship.

Below is a summary of the IEPA Recording Forms available for this assessment.

Please refer to the Recording Form table in the **Apprentice section below**.

Apprentice Instructions – 9610-701 Interview Underpinned by Portfolio of Evidence

Before the interview

You will prepare a portfolio of evidence during the on-programme phase of your apprenticeship to support the interview. You must submit the portfolio electronically in line with City & Guilds requirements at Gateway.

The portfolio of evidence is **not** directly assessed by the City & Guilds IEPA but is used as the basis for the interview. You can use the portfolio to provide tangible evidence to support your account of your own work during the interview.

The interview will be booked for you by your provider or employer.

Portfolio of evidence

The portfolio is a showcase of your best pieces of evidence.

You must complete a document that clearly shows how the evidence in the portfolio is referenced against the relevant KSBs that are assessed by the Interview. City & Guilds have provided an **'Evidence Reference Matrix – Portfolio of evidence'** form for you to use. You may choose to use your own version of the Evidence Reference Matrix, providing it clearly maps evidence to the KSBs.

The portfolio is not graded but will be used by the IEPA as the basis for the interview.

Portfolio of Evidence Requirements

The portfolio should meet the following requirements:

- The portfolio should only contain evidence related to the KSBs that will be assessed by the Interview.
- The evidence will typically contain **12** discrete pieces of evidence.
- Evidence should be mapped against the KSBs for this assessment method, using the '**Evidence Reference Matrix – Portfolio of evidence'** form provided in the **Provider & Employer Recording Forms** Pack, or alternative form. You may choose to use your own version of the Evidence Reference Matrix, providing it clearly maps evidence to the KSBs.
- Evidence may be used to demonstrate more than one KSB; a qualitative as opposed to quantitative approach is suggested.

The portfolio should **not** include reflective accounts or any methods of self-assessment.

Evidence sources may include:

- workplace documentation and records, for example:
  - workplace policies and procedures
  - witness statements
  - annotated photographs
  - video clips (maximum total duration 5 minutes); you must be in view and identifiable.

This is not a definitive list; other evidence sources can be included.

When you are selecting evidence to form your portfolio of evidence, it will be reviewed by your employer/provider. They will provide you with guidance on the evidence you produce and provide you with opportunities that will allow you to gather enough evidence for all the KSB criteria to be fully covered.

Any employer contributions should focus on direct observation of performance (for example, witness statements) rather than opinions. The evidence provided should be valid and attributable to the apprentice; the portfolio of evidence should contain a statement from the employer and apprentice confirming this.

When including witness statements in the portfolio of evidence, the statements should include:

- the relationship between witness and yourself
- witness name and job title
- evidence that was generated on-programme
- approximate date of work-based examples
- clear examples of direct observation of where you have demonstrated competency against the Standard whilst on programme.

All evidence must be of your own work. For any teamwork included in the portfolio of evidence, the evidence must clarify and focus only on your contribution.

Where necessary, confidentiality and data protection requirements must be followed to, eg permissions for use of video/images containing identifiable third parties (such as clients), anonymisation of documentation and permissions from clients when submitting items commissioned by them.

All the evidence submitted must be in a format that can be opened by the IEPA. EPA Pro accepts evidence in the form of Word documents, MP3 and MP4 files. Individual file size cannot exceed 250MB. Where evidence cannot be opened, eg evidence that is linked to an e-Portfolio or embedded within a document, the portfolio will be returned without it being reviewed.

Selecting Evidence

Before selecting the evidence for the portfolio of evidence, you should review the assessment requirements in the Standard to ensure:

- that only evidence relevant to the Standard is used
- the criteria to be covered by the portfolio of evidence
- the type of evidence that can be presented (see above)
- the amount of evidence that should be presented.
- the time period from which the evidence should have originated.

To assemble the portfolio of evidence, you should consider all the evidence you have available that shows you have met the requirements being assessed. Evidence collected towards the end of your Apprenticeship programme, as you become more independent, is likely to provide the most holistic evidence, i.e. covering multiple KSBs and grading descriptors at once. From this, you should select evidence that most efficiently meets all the relevant grading descriptors and KSBs to the highest available grade.

There are two questions you should consider when selecting work to form your portfolio of evidence:

1. Which pieces holistically (most efficiently) give evidence that together cover all the relevant KSBs?
2. Is this the ***best*** evidence I have, showing that I have met all of the requirements for the higher grade?

Preparing Evidence for Submission

Evidence being uploaded for EPA must be presented as follows:

- Evidence must have a header on each page containing the name and e-signature of the apprentice together with the date the evidence was produced.
- Portfolio of evidence will typically contain **12** discrete pieces of evidence.
- A completed '**Declaration of Authenticity**' form must accompany the portfolio.
- Each piece of evidence must be referenced to the KSB(s) it is being submitted against on the '**Evidence Reference Matrix – Portfolio of evidence'** form (found in the **Provider & Employer Recording Forms Pack**) or alternative form.

The submission of a fully completed '**Evidence Reference Matrix – Portfolio of evidence**' form (or alternative form) is mandatory. Failure to do so means that the IEPA will return the portfolio without it being reviewed.

In the case where evidence has been referenced in the '**Evidence Reference Matrix – Portfolio of evidence**' form (or alternative form) but is not present within the portfolio, the IEPA will request the missing evidence from the provider/employer.

A **Portfolio of Evidence Checklist** has been created to help you and your provider/employer ensure that all relevant information is accounted for. This can be found in the **Provider & Employer Recording Forms** Pack. A completed Checklist must **not** be submitted to City & Guilds, the Checklist is only a supportive document.

Guidance on submitting the portfolio

Your provider will submit the portfolio to City & Guilds at Gateway. The work evidenced in the portfolio must have been carried out by you and a signed 'Declaration of Authenticity' form **must** be submitted along with the portfolio. Your portfolio must also be accompanied by a fully completed '**Evidence Reference Matrix – Portfolio of Evidence**' form (or alternative form).

The Interview

City & Guilds will give you at least 7 days' notice of the interview.

The Independent End-point Assessor (IEPA) will interview you. This will be based on the portfolio you produced during your apprenticeship. The Interview covers both what you have produced and how you have done it.

You can use the portfolio to provide tangible evidence to support your accounts during the interview.

During the interview you will be asked **at least 6 questions** and it is likely that follow-up questions will be asked for clarification purposes and to allow you the opportunity to cover the KSBs and grading descriptors mapped to this assessment method at the highest level available.

The purpose of the Interview is to:

- Demonstrate that you can apply the broad range of knowledge, skills and behaviours. (KSBs) in the Occupational Standard that are assigned to this assessment method.
- Clarify any questions the IEPA has after reviewing the portfolio of evidence you submitted.
- Explore aspects of your work, including how it was carried out, in more detail.
- Enable the IEPA to draw a conclusion for the appropriate grade to be awarded.

Assessment Environment

Your Employer and Provider should ensure that the location of an assessment is prepared for the individual assessment activities, and that any equipment and/or resources are available for you to use.

The interview should take place in a quiet room, free from distractions and influence. This can be on or off employer's premises. The discussion between yourself and the IEPA usually takes place remotely via online video conferencing, providing the conditions and requirements for remote assessment are met.

The IEPA must ask you for photo identification and ensure appropriate measures are in place to prevent misrepresentation and ensure that you are not aided in any way.

Internet access and suitable equipment for remote assessment, such as a computer with audio and video capacity is required.

Timings

The Interview must last **60 minutes**. The IEPA can increase the time of the interview by up to 10%. This time is to allow the apprentice to respond to a question if necessary.

The IEPA must use the full time available for questioning to allow you the opportunity to evidence occupational competence at the highest level available unless you have already achieved the highest grade available.

Grading

The interview will be graded Fail, Pass or Distinction. The City & Guilds IEPA will allocate the grade using the 'Grading criteria' table provided.

The IEPA is responsible for making the grading decision. The results will not be shared with you on the day of the assessment.

Recording Forms

City & Guilds have designed specific Recording Forms for this Apprenticeship, some for providers and employers to use, and some for IEPAs to use.

Below is a summary of the Recording Forms available for this assessment.

Recording form	Purpose	Who should complete	Where it can be found
Evidence Reference Matrix – Portfolio of Evidence' form	Indicates to IEPA how the portfolio evidences the relevant KSBs mapped to this assessment method. Enables the IEPA to assess the evidence efficiently and effectively.	Apprentice/Provider/ Employer	Provider & Employer Recording Forms Pack
Declaration of Authenticity – Portfolio	Confirms that the submitted work is your own.	Provider & Employer Apprentice	Provider & Employer Recording Forms Pack
Portfolio of Evidence Checklist	A checklist to help you and employers ensure that all relevant information is accounted for. The completed checklist does **not** need to be submitted to City & Guilds.	Apprentice	Provider & Employer Recording Forms Pack

Portfolio Checklist

An **‘Apprentice Portfolio Checklist’** has been created to help the apprentice and the provider/employer ensure that all relevant information is accounted for. The Checklist can be found in the **Provider & Employer Recording Forms** pack**.**

You do **not** need to submit a completed Checklist to City & Guilds.

8. Re-sits & Re-takes

General Guidance

An apprentice who fails one or both assessment method(s) can take a re-sit or a re-take at their employer's discretion. The apprentice's employer needs to agree that 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 City & Guilds 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 a higher grade.

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

9610-700: Written Project Report with Presentation and Questioning

Provider & Employer Instructions

If the apprentice fails the project assessment method, they will be required to amend the project output in line with the IEPA's feedback. The apprentice will be given **4 weeks** to rework and submit the amended report.

Apprentice Instructions

If you fail the project assessment method, you will be required to amend the project output in line with the IEPA's feedback. You will be given **4 weeks** to rework and submit the amended report.

9610-701: Interview Underpinned by Portfolio of Evidence

Provider & Employer Instructions

The interview will be carried out in the same way as the original assessment. The IEPA must use different questions for the re-sit/re-take which are available in the **IEPA Recording Form** Pack.

Apprentice Instructions

The interview will be carried out in the same way as the original assessment but the IEPA will ask you different questions.

Appendix 1 Mapping of KSBs to grade themes, grading descriptors and indicative content for 9610-700 Written project report with presentation and questioning

Mapping of KSBs to grade themes

KSBS grouped by theme	Knowledge	Skills	Behaviour
Marketing methods, principles, and practices K6, K17, S2	Brand theory such as positioning, value, identity, guidelines and tone of voice. (K6) The metrics for the delivery and evaluation of marketing activity. (K17)	Plan and coordinate a marketing activity using marketing tactics to acquire and retain one or more customer segments using available resources. (S2)	None
Business and organisation K2, K3	The business' structure, vision, priorities and objectives and how their marketing role supports these. (K2) Business tools used to measure the impact of business objectives, the wider environment and sustainability on marketing activities. (K3)	None	None
Communication and copywriting K14, S5, S7, B4	Adapt communications for appropriate stakeholders and	Use copywriting techniques to write persuasive text/copy to meet a	Works collaboratively with others across the organisation and

KSBS grouped by theme	Knowledge	Skills	Behaviour
	internal audiences. (K14)	communications objective ensuring it is in line with organisational brand guidelines. (S5) Proofread marketing copy ensuring it is accurate, persuasive and is on brand. (S7)	external stakeholders. (B4)
Campaign management K11, K18, K19, K20, S1, S3, S16, S17, B1, B2	How internal stakeholders work to support the delivery of all marketing campaigns. (K11) The importance of reviewing campaigns regularly to ensure effectiveness and optimisation. (K18) The campaign management process including research, planning, budgeting, implementation and delivery. (K19) Tools used to support campaign management such as social media, Gantt charts, data analytics and project management software. (K20)	Develop or interpret briefs for external or internal stakeholders and measure delivery in line with the specification and agreed timelines. (S1) Contribute to the generation of innovative and creative approaches across video, images, and other formats, both online and offline, to support campaign development. (S3) Reviews campaigns regularly to ensure effectiveness, to optimise the results. (S16) Measure and evaluate campaign delivery to identify	Has accountability and ownership of their tasks and workload. (B1) Takes responsibility, shows initiative and is organised. (B2)

KSBS grouped by theme	Knowledge	Skills	Behaviour
		areas for improvement. (S17)	
IT and digital S4, S12, S13, S14	None	Use research/survey software to gather audience insight and/or evaluation to support the project. (S4) Create and maintain spreadsheets to support marketing activities such as project/budget planning and organisation of marketing assets. (S12) Use technology and software packages to support day-to-day activities, eg stakeholder communications, development of briefs, data analysis, report writing, presentations and project management. (S13) Identify and use data and technologies to achieve marketing objectives. (S14)	None

Grades and Grading Descriptors

Fail: does not meet Pass criteria

Theme KSBs	Pass Apprentices must demonstrate all Pass descriptors	Distinction Apprentices must demonstrate all Pass descriptors and all Distinction descriptors
Marketing methods, principles and practices K6, K17, S2	Selects appropriate metrics for the delivery and evaluation of marketing activity applying them accurately to elicit valid data (K17). Uses valid data and resources to plan and demonstrate how marketing activities effectively retain and acquire customer segments (K6, S2).	Justifies their plan for the choice of marketing activities and resources used to retain and/or acquire customer segments (K17, S2).
Business and organisation K2, K3	Explains the role that they play in the organisation's structure, vision and objectives and the impact it has on the wider environment and sustainability on marketing activities (K2, K3).	Evaluates the benefits and limitations of the proposed project recommendations to their organisation (K2).
Communication and copywriting K14, S5, S7, B4	Explains how they work collaboratively and adapt their communication style for stakeholders and internal audiences (K14, B4). Demonstrates copywriting techniques to write communications that are in line with organisational brand guidelines ensuring that it is proofread for accuracy (S5, S7).	Justifies the communication methods used to present their findings and why others were not suitable (K14). Evaluates the suitability of different copywriting techniques for different marketing communications, making valid and evidence-based recommendations (S5).

Theme KSBs	Pass Apprentices must demonstrate all Pass descriptors	Distinction Apprentices must demonstrate all Pass descriptors and all Distinction descriptors
Campaign management K11, K18, K19, K20, S1, S3, S16, S17, B1, B2	Explains clearly how campaign management process and tools used or proposed are appropriate, valid and taking responsibility to enable effective reviews to take place, leading to improvements in results with internal stakeholders engaged in the process (K11, K18, K19, K20, B2). Measures and evaluates campaign delivery, accurately interpreting data to draw valid and accurate conclusions and ownership of the workload (S1, S3, S16, S17, B1).	Evaluates the strengths and weaknesses of different approaches used for campaign management and how the data that comes from the campaign management process can be used to inform the recommendations (K18, K19, S3, S16).
IT and digital S4, S12, S13, S14	Applies advanced techniques* to the use of software packages to contribute to campaign management and achieving marketing objectives (S4, S12, S13, S14).	N/A

Indicative content

*Advanced techniques in this context includes:

Skill	Advanced Technique
S4	• Setting up alerts from social media or email • Combining quantitative and qualitative research data

Use research/survey software to gather audience insight and/or evaluation to support the project.	• Combining primary and secondary research data
S12 Create and maintain spreadsheets to support marketing activities such as project/budget planning and organisation of marketing assets.	• Automated spreadsheets – feeding to a summary sheet for example • Automatically updated graphs • Use of pivot tables to create dashboards • Multiple formulae to calculate return on investment (ROI)
S13 Use technology and software packages to support day-to-day activities, eg stakeholder communications, development of briefs, data analysis, report writing, presentations and project management.	• Links to spreadsheets to keep reports up-to-date • Use of animation in presentations • Create voiced presentations for circulation • Annotation/Footnotes in documents • Custom reports in website analytics
S14 Identify and use data and technologies to achieve marketing objectives.	• Email automation in marketing campaigns • Custom reports in website analytics • Combining data from different sources to create dashboards

Appendix 2 Mapping of KSBs to grade themes and grading descriptors for 9610-701 Interview underpinned by portfolio of evidence

Mapping of KSBs to grade themes

KSBs grouped by theme	Knowledge	Skills	Behaviour
Marketing methods, principles, and practices K1, K4, K15	Marketing theory, concepts and basic principles such as what marketing is, the marketing mix, the promotional mix and the difference between each channel used. (K1) What a marketing plan is, how it is built and its purpose. (K4) The principles of content marketing and content creation. (K15)	None	None
Regulation and legislation K9	Relevant regulatory and legislative requirements such as data protection, GDPR, cyber security, trading laws and copyright law for the handling and processing of data and its application. (K9)	None	None

KSBs grouped by theme	Knowledge	Skills	Behaviour
Marketing communications K10, B5	Principles of conducting marketing communications in an ethical and diverse manner. (K10)	None	Seeks learning opportunities and continuous professional development. (B5)
Customer experience and the customer journey K13, K21, K22, B6	How to brief and manage external marketing suppliers. (K13) The customer journey including customer offline and digital touchpoints, customer personas, how to engage customers at different stages of their journey, sales funnels and how to segment an audience for targeting. (K21) The impact marketing has on the level of customer service or the customer experience, including community management channels (K22)	None	Acts in a professional manner with integrity and confidentiality. (B6)
Research and campaign planning	The importance of competitor analysis	Contribute to the research of external	None

KSBs grouped by theme	Knowledge	Skills	Behaviour
K5 S9	and how to undertake it. (K5)	suppliers to support recommendations and procurement of marketing goods and services. (S9)	
IT and digital tools K7, K23 S8, S10	Create content using principles of design and copywriting and how to adapt for online and offline mediums eg writing digital content for the web compared to leaflets. (K7) Quality management and the maintenance of online and offline assets. (K23)	Use software to design and create marketing assets to meet the technical specification. (S8) Organise offline and digital assets ensuring they are coordinated and legally compliant. (S10)	None
Campaign implementation and management K12, K16, S6, S11, S15, B3	Common marketing channels, cross-channel behaviour, and how to manage and operate an integrated campaign using online and offline channels. (K12) Budget management and how to measure return on investment (ROI). (K16)	Build and implement multi-channel campaigns across a variety of platforms, either offline or digital media. (S6) Use a content management system to publish text, images and video/animated content. (S11) Monitor and amend campaigns to meet budget requirements	Works flexibly and adapts to circumstances. (B3)

KSBs grouped by theme	Knowledge	Skills	Behaviour
		including time and monetary costs. (S15)	
Data analysis and marketing evaluation K8 S18	Current and emerging technologies, software and systems which impact on marketing. (K8)	Use data analysis tools to record, interpret and analyse customer or campaign data. (S18)	None

Grades and Grading Descriptors

Fail: does not meet Pass criteria

Theme KSBs	Pass Apprentices must demonstrate all Pass descriptors	Distinction Apprentices must demonstrate all Pass descriptors and all Distinction descriptors
Marketing methods, principles and practices K1, K4, K15	Explains how they have effectively applied relevant marketing theories, concepts, and principles to inform their decision making, drawing upon evidence to support their reasoning (K1, K4, K15).	N/A
Regulation and legislation K9	Explains the regulatory and legislative requirements for handling and processing data in their marketing role (K9).	N/A
Marketing communications K10, B5	Describes the principles of conducting marketing communications and why it	N/A

Theme KSBs	Pass Apprentices must demonstrate all Pass descriptors	Distinction Apprentices must demonstrate all Pass descriptors and all Distinction descriptors
	is important that this is undertaken in an ethical and diverse manner (K10). Explains how they identify and seek out opportunities for professional development (B5).	
Customer experience and the customer journey K13, K21, K22 B6	Outlines how they brief and manage external suppliers in a professional manner with integrity and confidentiality (K13, B6). Describes the customer journey including offline and digital touchpoints, customer personas, sales funnels and how they segment audiences for targeting and the impact that marketing has on customer service or experience (K21, K22).	Analyses the impact of customer targeting and make evidence-based recommendations on how to improve the customer journey (K21, K22).
Research and campaign planning K5 S9	Outlines the importance of competitor analysis and how this would be undertaken and how it would contribute to the research of external suppliers to support recommendations (K5). Contributes to research of external suppliers and makes recommendations for the procurement of marketing goods and services (S9).	N/A
IT and digital tools K7, K23 S8, S10	Discusses how to create content and how this would be adapted for different online and offline mediums using software to produce assets, organising offline and digital assets to ensure they	N/A

Theme KSBs	Pass Apprentices must demonstrate all Pass descriptors	Distinction Apprentices must demonstrate all Pass descriptors and all Distinction descriptors
	are coordinated and legally compliant (K7, K23, S8, S10).	
Campaign implementation and management K12, K16 S6, S11, S15 B3	Summarises the common marketing channels and cross-channel behaviour to use in order to build and implement campaigns using offline and online media platforms working flexibly and adapting to circumstances (K12, S6, B3). Shows how a content management system is used to publish text, images and video/animated content (S11). Describes how to measure return on investment (ROI) and demonstrate how campaigns are monitored and amended to meet budget requirements (K16, S15).	Evaluates the suitability of different marketing channels for building and implementing campaigns, making valid and evidence-based recommendations for change (K12, S6).
Data analysis and marketing evaluation K8 S18	Identifies current and emerging technologies and software and how these are used to record and analyse customer data and the impact on marketing campaigns (K8, S18).	Justifies the technology and software used to analyse their findings and why others were not suitable (K8, S18).

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Who we are

As part of the City & Guilds Group, we believe in a world where people and organisations have the confidence and capabilities to prosper, today and in the future.

As workplaces evolve, so do we. That's why we set the standard for skills that transform lives, industries, and economies.

About City & Guilds

City & Guilds is the global skills partner, empowering people, organisations and economies to develop the skills they need for growth. With almost 150 years of trusted expertise, we support people into work, help them develop on the job and move into the next job.

We work with Governments, employers, training providers, colleges and industry stakeholders to design and deliver high-quality training, qualifications, assessments and credentials that lead to meaningful career progression. We understand the life changing link between skills development, social mobility and success. Our solutions span critical sectors including construction, engineering, transport, energy and electrical, serving over 1 million learners annually.

Through our comprehensive portfolio of brands and trusted global network, we set industry-wide standards for technical, behavioural and commercial skills to improve performance and productivity. We believe you can achieve your potential - and we're here to help make it happen.

City and Guilds

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