

Level 2 End-point Assessment for Lean Manufacturing Operative – Logistics/Material handling (9315-24)

Standard: ST0420

EPA Plan: V1.0 (AP02) and V1.2

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EPA Pack for Providers & Employers

Version 1.2

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For external use

Version	Summary of changes	Section
Version 1.0 October 2021	Document Created	All
Version 1.1 February 2022	Amendment to add clarity	Gateway
Version 1.2 September 2025	<p>Titling amendment</p> <p>Inclusion for use for V1.2 of EPA Plan</p> <p>Amendment to minimum required time on programme to align with changes to the apprenticeship funding rules</p> <p>Amendment to functional skills requirements to align with changes to the apprenticeship funding rules</p> <p>Overall grade capping statement added</p>	

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1. Apprenticeships



This pack will help providers and employers prepare apprentices for the End-point Assessment (EPA) of their Level 2 End-point Assessment for Lean Manufacturing Operative – Logistics/Material handling (9315-24) Apprenticeship Standard. It explains how apprentices will demonstrate the knowledge, skills, and behaviours (KSBs) which they developed during their apprenticeship.

This pack must be used alongside the:

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

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

- Using the EPA Pro portal
- The process for booking EPA
- Acceptable qualifications and certificates at Gateway
- Uploading files to the EPA Pro portal
- Use of electronic signatures
- Knowledge tests on evolve (where applicable)
- Responsibilities of providers and employers
- The Quality Assurance process

Full time apprentices will typically spend 12 to 18 months on-programme working towards meeting the standard, with a minimum of 20% off-the-job training. 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 how they are getting on.

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:

- [Observation with Questions and Answers](#)
- [Professional Discussion](#).

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 questions
- Review which completed **Recording Forms and evidence** must be submitted, and 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 the EPA Pro portal to help manage the apprentice's progress through EPA
- For on-site assessment: Arrange for a designated contact to be available on the day to ensure the correct resources are available

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 Independent End-point Assessor (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 provider and employer 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, e.g. drafts, notes, planning etc.

City & Guilds have produced forms for apprentices to use when reviewing evidence produced outside of 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.

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 that all the health and safety requirements are in place when working on any projects or before apprentices begin any EPA.

Should an apprentice fail to follow correct health and 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.

Overall Grade

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

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. Each assessment has equal weighting towards the overall grade.

In order to pass the Apprenticeship, both assessment methods must be achieved. Both assessment methods are equally weighted. The Professional Discussion determines whether a Distinction grade is awarded. The apprentice must pass the observation and gain a distinction in the professional discussion to gain an overall EPA distinction.

Assessment 1: Observation Questions and Answers	Assessment 2: Professional Discussion	Overall Grading
Fail	Any grade	Fail
Any grade	Fail	Fail
Pass	Pass	Pass
Pass	Distinction	Distinction

The overall EPA grade must be capped at a Pass if the apprentice has had to resit or retake any assessment method, however the grade the apprentice has achieved for each component is not capped and will be identified on the Statement of Achievement.

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
704 Observation with Questions and Answers	X/P	50%
705 Professional Discussion	X/P/D	50%
	Total	100%

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 the Institute for Apprenticeships and Technical Education (IfATE) 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 'Pass+ Feedback' will also cover the areas against which the apprentice's evidence has resulted in the award of a pass or distinction.

Statement of Achievement

A printed 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.

Digital Credentials

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



[9315-24 - Level 2 End-point Assessment for ST0420/AP02 Lean Manufacturing Operative – Logistics/Material handling - Distinction](#)

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.

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- 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; and
- 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

The Occupational Role

The Manufacturing Industry offers an exciting and varied career both in the UK and abroad providing a broad spectrum of opportunities for people to work in a technically advanced and innovative environment.



Businesses within the sector range from small family run manufacturing operations to large multi-national companies driving the country's growth and wealth.

The UK's Manufacturing Industry is highly regarded worldwide for its innovation and manufacturing excellence and requires a high degree of skill and knowledge across all levels of their organisations.

A Lean Manufacturing Operative will:

- be expected to carry out their work safely and meet the exacting quality standards demanded in a fast paced and efficient processing environment and develop into a multi-skilled operator through process ownership. They can be required to carry out manufacturing activities on multiple products with different specifications consecutively, e.g. automotive manufacturing – multi-models manufacturing results in the manufacturing of different models of vehicle with different specification variants within a high-volume environment.
- be required to prepare, control, contribute to and complete manufacturing operations, and follow manufacturing processes and standard operating procedures (SOPs) whilst adhering to specific safe working policies and procedures. They will be responsible for maintaining Health and Safety requirements at all times, e.g. wearing correct Personal Protective Equipment (P.P.E.), correct use of equipment and tooling, safe stopping and resetting of machinery, maintain an organised work area, e.g. 5s and ensuring the safe disposal of waste in line with environmental systems and regulatory requirements (ISO 14001).
- be required to contribute, develop, and support improvement in the manufacturing operation using continuous improvement methods, kaizen tools, process visualisation using lean principles and problem-solving tools and techniques.
- be responsible for carrying out quality checks throughout the manufacturing operations to ensure quality is built in and that any defects or concerns are highlighted and dealt with in line with relevant quality standards (ISO 9002).

They will work closely with stakeholders and will have clear reporting lines to ensure appropriate escalation, e.g. team leader, line leader, process leader, supervisor, etc. should problems occur within the process.

The advanced manufacturing sector has developed to include a wide range of new technologies and can involve the manufacturing of a number of different products with different specifications at any given time. This can result in lean manufacturing operatives being required to carry out manufacturing activities on multiple products with different specifications consecutively, e.g. automotive manufacturing – multi model manufacturing results in the manufacturing of different models of vehicle with different specification variants within a high-volume manufacturing environment.

Examples of the job titles from across the manufacturing sector that would be covered within this standard are: Team Member Production; Manufacturing Production Operative; Manufacturing Assembly Operative; Manufacturing Inspection/Quality Assurance Operative; Manufacturing Logistics Operative; Manufacturing Material Handling Operative; Manufacturing Process/Finishing Operative.

The Occupational Standard

This apprenticeship standard has the knowledge, skills, and behaviours (KSBs) which a successful apprentice will be able to demonstrate.

Knowledge, Skills & Behaviours

Ref.	Knowledge and understanding Core: All apprentices must complete	Assessment Method
K1	Health and Safety: Relevant statutory, organisational and health and safety regulations relating to lean manufacturing operations and safe practices.	Professional Discussion
K2	Environmental: Compliance procedures/systems in line with regulatory requirements, e.g. ISO 14001 or other relevant environmental standards.	Professional Discussion
K3	Production: Their individual roles and responsibilities within the organisation and the flexibility required to deliver products to meet customers costs/delivery targets/requirements, e.g. Just in time (JIT).	Professional Discussion
K4	Lean Manufacturing Operations: Manufacturing standard operation procedures (SOPs) adherence and development of lean processes.	Observation with Questions and Answers
K5	Process equipment monitoring, data collection, error proofing and operating procedures, e.g. ISO 9002 or other relevant quality standards.	Professional Discussion
K6	Problem Solving: The tools and methods of effective problem-solving using data, reports and documents to resolve production related issues, e.g. A3 report, graphs, matrices and escalate concerns.	Professional Discussion
K7	Continuous Improvement: How to study and identify ways to improve the safety, quality, cost or process efficiency using lean manufacturing tools, e.g. kaizen.	Professional Discussion
K8	Communication: How to share information using a range of methods within the manufacturing environment, e.g. oral, written, electronic, information boards, visual displays.	Observation with Questions and Answers
K9	Workplace Organisation: How to maintain a safe and efficient work site through workplace organisation, e.g. 5s and process ownership.	Observation with Questions and Answers

Ref.	Skills Core: All apprentices must complete	Assessment Method
S1	Health & Safety: Work safely at all times, complying with health and safety legislation, regulations, and other relevant guidelines. Identifying risks within their processes and support/carry out countermeasure activities to improve safe working. Manage tooling, equipment and materials daily in-line with supplier standards, e.g. COSHH (Control of Substances Hazardous to Health).	Observation with Questions and Answers
S2	Environmental: Comply with environmental procedures and systems and contribute to the achievement of specific standards, e.g. ISO 14001 or other relevant environmental standards and use the 4R's (Reduce, Re-use, Recycle, Recover) where possible.	Professional Discussion
S3	Production: Demonstrate their ability to carry out their role effectively, efficiently and flexibly maintaining lean manufacturing principles to meet customer's demands, e.g. JIT.	Observation with Questions and Answers
S4	Lean Manufacturing Operations: Demonstrate their skill and knowledge following SOPs and building their versatility across a number of processes and process areas. Select and use appropriate tools, equipment and materials to carry out the manufacturing operation.	Observation with Questions and Answers
S5	Quality Control: Demonstrate appropriate process documentation control. Accurately completing check sheets, monitoring process and equipment data efficiently and legibly using the correct terminology required to meet the quality standard, e.g. ISO 9002.	Observation with Questions and Answers
S6	Problem Solving: Demonstrate their ability to identify and resolve problems within the lean manufacturing environment using effective problem-solving tools and techniques. Manage problems that may occur during the manufacturing process within the limits of their responsibility and escalate as appropriate.	Professional Discussion

S7	Continuous Improvement: Generate ideas and contribute to process improvement activities individually or as part of a team through fact finding and analysis to improve the safety, environment, quality, cost or production process. Identifying and eliminating the 7 wastes (defects, over production, transportation, waiting, inventory, motion and processing).	Professional Discussion
S8	Communication: Demonstrate communication skills which include oral, written, electronic (PC), information boards or visual displays to effectively share information.	Professional Discussion
S9	Workplace Organisation: Maintains and monitors the work site efficiently and effectively at all times using the elements of sifting, sorting, sweeping, spick & span (5s) within the lean manufacturing environment.	Observation with Questions and Answers

Ref.	Behaviours Core: All apprentices must complete	Assessment Method
B1	Punctual, reliable and takes responsibility for their own actions.	Professional Discussion
B2	Show respect for others, having regard for diversity and equality.	Observation with Questions and Answers
B3	Respond positively to change in the working environment.	Professional Discussion
B4	Integrates within the team and supports others.	Professional Discussion
B5	Can work independently and effectively in challenging situations.	Professional Discussion

B6	Maintains quality of work under pressure.	Observation with Questions and Answers
B7	An open and honest communicator.	Professional Discussion
B8	Listens to other people's opinions.	Professional Discussion
B9	A positive and respectful attitude.	Professional Discussion
B10	Follows instructions and guidance and demonstrates attention to detail.	Observation with Questions and Answers
B11	Seeks opportunities to develop and adapt to different situations, environments or technologies.	Professional Discussion

Job Role Specific KSBs

Ref.	Knowledge Job role: Logistics/Material handling	Assessment Method
K20	The procedures and documentation required to allow the transfer of materials to take place.	Observation with Questions and Answers
K21	Where to obtain the necessary job instructions, specification details and specific transfer/handling procedures that are used, and how to interpret them.	Observation with Questions and Answers
K22	The procedures for the movement and transferring of materials to the correct location within given timelines.	Professional Discussion

K23	What tools and equipment are used for the material movement operations undertaken and how to check that they are in a safe and usable condition.	Professional Discussion
K24	The lifting and handling procedures, and load bearing capacities of the equipment being use.	Observation with Questions and Answers

Ref.	Skills Job role: Logistics/Material handling	Assessment Method
S22	Safely move materials to the correct location using the relevant equipment.	Observation with Questions and Answers
S23	Obtain and follow the correct Job instructions, specification details and specific transfer/handling procedures in accordance with time constraints and the roles and responsibilities identified for the logistic/material handling activity.	Observation with Questions and Answers
S24	Move materials using the appropriate procedures, ensuring the materials are correct, safely loaded and secure.	Observation with Questions and Answers
S25	Check materials selected to be moved are in line with job requirements.	Observation with Questions and Answers
S26	Carry out quality checks on materials that are to be moved and deal with quality concerns and damage in line with their responsibility.	Observation with Questions and Answers
S27	Return equipment to its correct location on completion of the activities and leave it in a safe and usable condition.	Observation with Questions and Answers

Grading Descriptors: Observation with Questions and Answers

The apprentice will fail the assessment method if they do not meet the pass criteria.

Area of the Standard to be tested	Name of grade	Grade descriptor
Core Knowledge, Skills and Behaviours		
<p>Complying with health & safety and environmental legislation, regulations</p> <p>K4, K8, K9, S1, S4, S9</p>	<p>Pass</p>	<p>The Apprentice:</p> <ul style="list-style-type: none"> • Demonstrates working in a safe manner, following health and safety procedures and does not compromise the safety of self and others e.g. correct use of Control of Substances Hazardous to Health (COSHH) and Personal Protective Equipment (PPE) procedures. • Carries out tasks in accordance with standard operating procedures, explains the potential implications to health and safety of not following the manufacturing SOPs throughout the observation. • Carries out tasks in a logical order following the requirements of the organisation. • Describes the benefits of workplace organisation and its impact on Safety. • Demonstrates how to identify, assess and control health and safety risks within the work environment, e.g. check sheets, risk assessments. • Demonstrates environmental awareness by following company policies and procedures, e.g. ISO 14001, 4R's. • Prepares, handles, transfers and stores materials safely using relevant equipment, e.g. flammable materials.
<p>Documentation interpretation and their use</p>	<p>Pass</p>	<p>The Apprentice:</p>

S3, S5		<ul style="list-style-type: none"> • Identifies and demonstrates where to obtain and follow the necessary job instructions, operating procedures and specifications that are used, and how to interpret them. • Selects and uses appropriate tools, equipment and materials to carry out the manufacturing operation. • Demonstrates how to accurately complete check sheets, monitor process and equipment data efficiently and legibly using the correct terminology. • Follows the specified sequence and procedure at all times. • Identifies the correct methods of handling and storing the samples. • Demonstrates how to interpret the data/results gained from the process. • Maintains lean manufacturing principles continuously to meet customer demands, e.g. Just In Time (JIT).
Lean Manufacturing B2, B6, B10	Pass	<p>The Apprentice:</p> <ul style="list-style-type: none"> • Demonstrates a professional approach to work colleagues with regard to equality and diversity within the workplace. • Maintains quality of work under pressure, e.g. when problems occur. • Follows instructions and guidance demonstrating attention to detail, e.g. following SOP's.
Job role: Logistics/Material handling		
K20, K21, K24 S22, S23, S24, S25, S26, S27	Pass	<p>The Apprentice:</p> <ul style="list-style-type: none"> • Demonstrates their ability to move materials using the appropriate procedures, ensuring the correct materials are safely loaded and secure.

		<ul style="list-style-type: none"> • Demonstrates the materials selected to be moved are in line with job requirements. Safely move materials to the correct location using the relevant equipment. • Demonstrates the quality checks on materials that are to be moved and deal with quality concerns and damage in line with their responsibility, return equipment to its correct location on completion of the activities and leave in a safe and usable condition. • Demonstrates the lifting and handling procedures, and load bearing capacities of the equipment being used.
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Grading Descriptors: Professional Discussion

The apprentice will fail the assessment method if they do not meet the pass criteria.

Area of the Standard to be tested	Name of grade	Grade descriptor
Core Knowledge, Skills and Behaviours		
Complying with health & safety and environmental legislation, regulations K1, K2, K5 S2 B1	Pass	The Apprentice: <ul style="list-style-type: none"> • Describes employer policy and expectations on punctuality and attendance and how they have met these. • Describes the main Health Safety and Environmental considerations for a lean manufacturing operative, e.g. COSHH, HASAWA. • Describes the specific statutory, quality, environmental compliance procedures/systems, organisational and health and safety regulations relevant to

		<p>their work activities. e.g. ISO 14001 or other relevant environmental standards.</p> <ul style="list-style-type: none"> • Describes the employer’s environmental practices and explains how they have disposed of waste in line with policy by explaining how this was done in accordance with waste streams, e.g. sorts recyclable materials from non-recyclable materials re-uses materials where appropriate.
K1, K2	Distinction	<p>In addition to meeting the Pass criteria the Apprentice:</p> <ul style="list-style-type: none"> • Explains how they have made an improvement to health, safety and environmental processes within their workplace. • Explains when they have promoted a culture of safety by acting as a role model, identifying risks and non-compliances, advising others how to make their practice safer. • Explains the information available to address safety, quality, cost and environmental data to recognise potential concerns and support countermeasure activity (proactive).
<p>Continuous Improvement K3, K6, K7 S6, S7, S8 B3, B4, B5, B7, B8, B9, B11</p>	Pass	<p>The Apprentice:</p> <ul style="list-style-type: none"> • Describes Continuous Improvement and how to use the tools and methods of effective problem solving, e.g. A3 report, graphs, matrices and escalate concern. • Describes how to study and identify ways to improve the safety, quality, cost or process efficiency using lean manufacturing tools, e.g. kaizen. • Describes roles and responsibilities within the organisation and the flexibility required to deliver products to meet

		<p>customers costs/delivery targets/requirements, e.g. project plan.</p> <ul style="list-style-type: none"> • Explains when they have responded positively to change with open and honest communication, e.g. listens to other opinions. • Explains what teamwork is and how they support others as well as how they work independently in challenging situations. • Explains their individual role and responsibilities within the organisation and the flexibility required to deliver products to meet customers costs/delivery targets/requirements, e.g. Just in time (JIT).
K6, K7, S8	Distinction	<p>In addition to meeting the pass criteria the Apprentice:</p> <ul style="list-style-type: none"> • Describes their use of advanced problem-solving tools and methods of effective problem-solving using data, reports and documents to resolve production related issues, e.g. A3 report, graphs, matrices and escalate concerns. • Explains why the use of effective problem-solving tools and techniques to identify and resolve problems within the lean manufacturing environment is critical to their role. • Explains the consequences of failing to operate problem-solving techniques within the limits of their responsibility. • Explains the need to escalate problems as appropriate and the consequences of not escalating problems, e.g. the 8 steps of problem solving. • Explains how they have identified new ideas and contributed to process improvement activities individually or as part of a team, e.g. fact-finding and

		<p>analysis to improve the safety, environment, quality, cost or production process.</p> <ul style="list-style-type: none"> • Describes the appropriate use of different communication skills, e.g. oral, written, electronic (PC), information boards or visual displays to effectively share information in different scenarios. Explains how they have used these communication tools or observed these in use.
Job role: Logistics/Material handling		
<p>Documentation interpretation and their use K22, K23</p>	<p>Pass</p>	<p>The Apprentice:</p> <ul style="list-style-type: none"> • Describes the procedures for the movement and transferring of materials to the correct location within given timelines. • Describes the tools and equipment used for the material movement operations undertaken and how to check that they are in a safe and usable condition.

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 provide the following at Gateway:

- The apprentice must complete the English and Mathematics requirements in line with the apprenticeship funding rules
- The apprentice must complete the following approved qualification as mandated in the standard: Level 2 Diploma in Manufacturing (Knowledge and Skills).
- For Professional Discussion, the apprentice will be required to submit a Portfolio of Evidence.
- Lean Manufacturing Operative – Logistics/Material handling Portfolio Header and Declaration Form.
- Portfolio of Evidence Checklist.

The following should be completed on the EPA Pro platform:

- Gateway Declaration Form signed by the apprentice
- Gateway Declaration by the provider, on behalf of the employer and tutor, confirming that the apprentice has completed the minimum time required on-programme, in line with the apprenticeship funding rule

City & Guilds will confirm when all of the Gateway requirements have been met.

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 12 weeks of the EPA Gateway, starting when City & Guilds has confirmed that all Gateway requirements have been met.

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

Planning meetings are usually only provided for Standards where they are required by the Assessment Plan. The EPA Partnership Managers can provide additional guidance.

On-going during on-programme	Evidence & Forms
<p>Apprentice</p> <ul style="list-style-type: none"> • Completes the English and Mathematics components of the apprenticeship, in line with the apprenticeship funding rules. • Completes the mandatory qualification requirements of the Apprenticeship. • Produces sufficient evidence in the form of a Portfolio of Evidence to allow them to consistently demonstrate knowledge, skills and behaviours as described in the Standard. 	<p>Start to collate:</p> <ul style="list-style-type: none"> • Portfolio of Evidence typically during the last months of the apprenticeship.
<p>Provider/ Employer</p> <ul style="list-style-type: none"> • 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 apprentice's potential evidence for the portfolio is appropriate and sufficient to cover the relevant KSBs (knowledge, skills, behaviours) in scope and breadth. 	

- Ensures the apprentice is completing the mandated Level 2 Diploma in Manufacturing (Knowledge and Skills).

Gateway Process	Evidence & Forms
<p>Apprentice</p> <ul style="list-style-type: none"> • Attends the optional EPA Planning Meeting. • Must have been on-programme for the minimum amount of time required by the apprenticeship funding rules. • Completes and submits evidence and forms. 	<p>Submits to provider:</p> <ul style="list-style-type: none"> • Apprentice Gateway Declaration • Level 2 Lean Manufacturing Operative – Logistics/Material handling Portfolio Header and Declaration Form • Portfolio of Evidence Checklist • Portfolio of Evidence (which will typically include five pieces of evidence)
<p>Provider/Employer – on EPA Pro</p> <ul style="list-style-type: none"> • Reviews progress and ensures the apprentice is ready for EPA. • Reviews evidence to confirm that it is appropriate and sufficient to meet the standard. • Attends the optional EPA Planning Meeting. • Books EPA on the EPA Pro portal, in line with City & Guilds booking timelines in the EPA Manual. • 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. • Completes Gateway Declaration on behalf of the employer and tutor. • Attends the optional EPA Planning Meeting. • Uploads evidence and forms onto EPA Pro. 	<p>Complete on EPA Pro:</p> <ul style="list-style-type: none"> • Gateway Declaration • Preferred Planning Meeting Date form (on behalf of the employer) <p>Uploads onto EPA Pro:</p> <ul style="list-style-type: none"> • Apprentice Gateway Declaration • Apprentice’s Portfolio of Evidence • Level 2 Lean Manufacturing Operative – Logistics/Material

	handling Portfolio Header and Declaration Form
<p>IEPA</p> <ul style="list-style-type: none"> • Attends the optional EPA Planning Meeting. • Advise the Lead IEPA within 3 working days if the standards have been met. 	<p>Completes:</p> <ul style="list-style-type: none"> • the PRO booking details (i.e. dates and times) and places them in their calendar. The IEPA also requests a GTM link for remote PD as applicable.
<p>City & Guilds EPA Gateway Team</p> <ul style="list-style-type: none"> • Formally confirms when all of the Gateway requirements have been met. 	
<p>City & Guilds EPA Team</p> <ul style="list-style-type: none"> • Agrees with the provider and IEPA a mutually convenient date for the optional EPA Planning Meeting. • Agrees with the provider and IEPA a mutually convenient date for the EPA Events 	

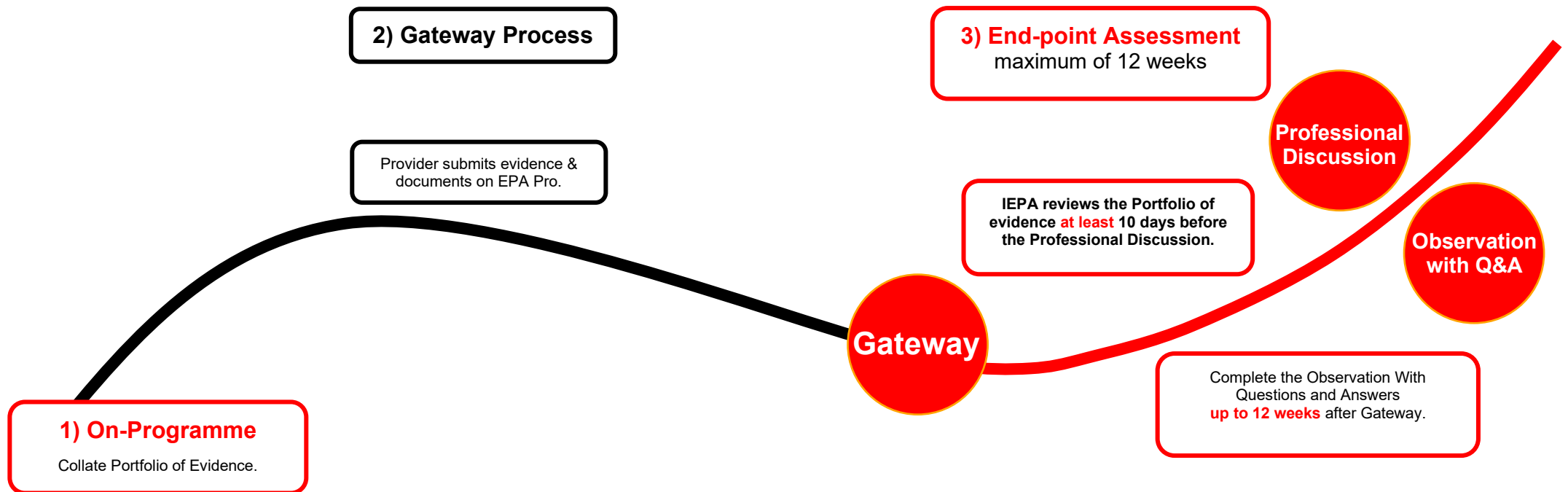
End-point Assessment	Evidence & Forms
<p>Apprentice</p> <ul style="list-style-type: none"> • Completes End-point Assessments. 	
<p>Provider/Employer</p> <ul style="list-style-type: none"> • Ensures the apprentice has access to the resources required for the assessments (see the Resources section). 	
<p>IEPA</p> <ul style="list-style-type: none"> • Reviews the apprentice’s Portfolio of Evidence prior to EPA events. • Chooses questions from the City & Guilds question bank and those generated by themselves. 	<p>Completes:</p> <ul style="list-style-type: none"> • Assessment 704 Observation with Questions and Answers

<ul style="list-style-type: none"> • Carries out End-point Assessments. • Marks each assessment, communicates the results to the LIEPA, via EPA PRO within the SLA three-days. • Provides feedback for assessments in EPA Pro. 	<p>Recording Form – Level 2 Lean Manufacturing Operative Logistics/Material handling</p> <ul style="list-style-type: none"> ○ Observation form ○ Questions and Answers recording sheet ○ End-point Assessment Feedback Form ○ Justification for the grade awarded for End-point Assessment <ul style="list-style-type: none"> • Assessment 705 Professional Discussion: Recording Form – Level 2 Lean Manufacturing Operative Logistics/Material handling ○ Professional Discussion Questions recording sheet ○ End-point Assessment Feedback Form ○ Justification for the grade awarded for End-point Assessment
<p>LIEPA</p> <ul style="list-style-type: none"> • Samples and quality assures assessments, within SLA three-days. • Confirms overall grade to EPA Team. 	<p>Reviews:</p> <ul style="list-style-type: none"> • Independent End-point Assessor Recording Forms • End-point Assessment Grading Form
<p>City & Guilds EPA Team</p> <ul style="list-style-type: none"> • Communicates the results to the provider via EPA Pro. 	

- Processes the overall result if the apprentice has passed all the assessments and advises IfATE who issue the certificate directly to the employer. The data will be provided to IfATE once a month, on the fourth working day of the month.

Summary Timescales

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



5. End-Point Assessment Resources

Assessment Method	Resources Required
Observation with Questions and Answers	The apprentice's place of work or an in-workplace practical assessment site (Realistic Working Environment) reflecting typical working conditions.
	The environment should include sufficient space for the City & Guilds IEPA to observe and take notes.
	Any specialist PPE required will be provided by the employer or the provider.
	Equipment to take photographs, for example recording devices, such as phone, camera and/or video recorder.
Professional Discussion	A suitable room for the Professional Discussion to take place, large enough to accommodate all of those involved (including the employer representative) and away from the normal place of work for the apprentices.
	Seating area or room for any other apprentices to wait (if appropriate).
	Access to water and cups.
	If the meeting is to be carried out remotely, internet access and suitable equipment such as use of video link. If a video link is used appropriate measures must be in place to ensure that City & Guilds is satisfied that the responses given are those of the candidate, e.g. use of a 360-degree camera to allow the assessor to look around the room during the interview.
	The apprentice and the IEPA must each have a copy of the apprentice's portfolio of evidence to refer to.



6. Assessment Instructions: 704 Observation with Questions and Answers

Assessment Specification

Description	Coverage	Grade
Observation with Questions and Answers	Knowledge: K4, K8, K9, K20, K21, K24 Skills: S1, S3, S4, S5, S9, S22, S23, S24, S25, S26, S27 Behaviours: B2, B6, B10	X/P

Generic Specification

The apprentice will be observed carrying out work tasks in their normal work environment or in a suitable area away from the workplace where it is not feasible to use the employer's premises. They will use tools and equipment with which they are familiar, which is likely to enable them to perform at their best. The Observation will be followed by questioning from an IEPA, which will enable the checking of underpinning knowledge.

The aim of the Observation is to show evidence of how the apprentice has carried out work in response to a specified task(s). The activities carried out in the task(s) must demonstrate work that reflects relevant working practices for this role, meets the requirements of the employer organisation and allows the relevant KSBs (knowledge, skills and behaviour) to be demonstrated for this assessment method and those relating to their chosen option in a role in Logistics/Material handling.

The purpose of the IEPA questioning will be to check the knowledge and skills shown in the apprentice's work-based Observation and explore the underpinning reasoning and details of the evidence provided in the project report. The questions will draw out the best of the apprentice's competence and excellence and cover the KSBs assigned to this assessment method.

Provider & Employer Instructions

The IEPA will conduct an Observation of the apprentice in their normal work environment or in a suitable area away from the workplace where it is not feasible to use the employer's premises. The Observation detail and grading will be documented by them using the Observation recording Form.

The purpose of the Observation is to provide the opportunity for the apprentice to demonstrate the application of core and specific knowledge, skills and behaviours as detailed in the assessment specification. Apprentices will be observed and will be assessed against both the core and their chosen specific job role option KSBs as identified within the Standard. Typically, this will be covered within one task but may be covered over separate tasks if required.

The assessment plan allows for one IEPA to observe up to a maximum of one apprentice at any one time, to allow for quality, rigour and safety. The IEPA must use their discretion in relation to health and safety and ensuring that they are able to maintain quality and rigour throughout the Observation. The IEPA may stop the Observation if there are unsafe working practices.

The IEPA will make all grading decisions. No information regarding the marking/grading will be given by the IEPA.

The EPA team will arrange dates and times with the EPA provider/employer.

Before the Observation, the provider/employer must discuss with the apprentice the requirements of the Observation, when the Observation will be and what they will need to produce. During the Observation the apprentice will be expected to demonstrate to the IEPA the application of specific job-related knowledge, skills and behaviours as outlined in the occupational standard and mapped to this assessment method.

How to conduct an Observation

The Observation should be conducted in the following way, to take account of the occupational context in which the apprentice operates:

- There may be breaks during the Observation to allow the apprentice to move from one location to another as required and for comfort breaks.
- The IEPA must ask all knowledge questions at the end of the Observation to avoid distracting the apprentice during their required task.
- The Observation may be made up of a number of tasks but should include an end-to-end process.
- Apprentices must be briefed by the IEPA prior to the observation commencing.

The approach has been designed to cover the broad and diverse range of activities that can be undertaken by apprentices in Lean manufacturing. For example, and not limited to:

- Supply manufacturing processes and activities
- Warehouse/store procedures
- Moving and transporting products.

Task brief – Carry out a Logistics / Material handling activity

- This must be based on the apprentice's normal job role
- This must be an end-to-end process.

The following activities **MUST** be observed during the observation:

Core

- Use safe working practices
- Read and interpret instructions
- Carry out a tooling changeover/Process and equipment clean down/Equipment maintenance, e.g. TPM (Total Productive Maintenance)
- Complete relevant records
- Set up and run equipment in accordance with company specifications and standards

Specialism

- Safely move materials to the correct location using the relevant equipment
- Obtain and follow the correct job instructions, specification details and specific transfer/handling procedures in accordance with time constraints and the roles and responsibilities identified for the logistics/material handling activity
- Move materials using the appropriate procedures, ensuring the materials are correct, safely loaded and secure
- Check materials selected to be moved are in line with job requirements
- Carry out quality checks on materials that are to be moved and dealing with quality concerns and damage in line with their responsibilities
- Return equipment to its correct location on completion of the activities and leaving it in a safe and useable condition

For re-sit/re-take the apprentice must be presented with a different manufacturing process/task, this must be recorded on the recording forms.

Questions with Answers

Questions will be asked after the Observation has been completed. The IEPA will ask up to **five questions**. They may ask follow-up questions where clarification is required. Those KSBs that did not occur naturally during the observation may be assessed via questioning although this is expected to be a minimal number of KSBs. Any additional questioning is to be included in the total two hours permitted for the observation.

How to prepare for the Observation

Ensure that an appropriate work area is available. This can be separate from the normal working area if necessary to facilitate observation. Ensure that the tools, processes, resources and any written instructions (such as SOPs) are available.

Introducing the End-point assessments to the apprentices

Prior to this assessment method, the provider/employer should have made the apprentice aware of the two assessment methods that make up the EPA of the Apprenticeship prior to the gateway process.

When introducing any assessments, it is expected that provider/employer set a realistic timeframe for completion of each assessment, and that this should align with any timeline agreed with City & Guilds when booking EPA. If assessments are not completed within the agreed timeframe without the apprentice having a good reason, the timeline for any IEPA visit may be reviewed. City & Guilds EPA team will liaise with IEPAs directly to inform them of the review.

In advance of the Observation, the apprentice must be provided with information on the format of the Observation, including timescales. Each apprentice will be assessed against the core KSBs relevant to this assessment method and those relating to their chosen option.

Timings

The Observation with Questions and Answers should take a maximum of **2 hours**, including time for questions and answers relating to the task(s) carried out. The IEPA will observe enough production cycles to be able to accurately assess competence. The Observation may be split into different sections held over a maximum of one working day. The length of a working day is typically usually 7.5hours.

The IEPA has the discretion to increase the time of the Observation by up to 10% to allow the apprentice to complete a task.

Grading

The Observation with Questions and Answers will be graded Fail or Pass. The City & Guilds IEPA will allocate the grade using the 'Grading criteria' table provided.

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

Preparation

Please ensure that any PPE required for the premises apart from footwear is made available to the IEPA for the day and that the EPA team are made aware of any other PPE requirements.

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.

Please see below for a summary of the recording forms that are available for this assessment.

Recording form	Purpose	Who should complete	Where it can be found
Sample Apprentice Review Form for Employers.	It is expected that the employer will have regular reviews with the apprentice, this form can be used to record these meetings. Employers may devise their own forms or systems (electronic or paper-based). NB: This form is NOT submitted to City & Guilds.	Employer	Provider & Employer Recording Forms Pack

Apprentice Instructions

Level 2 Lean Manufacturing operative – Logistics/Material handling

Observation with Questions and Answers

A City & Guilds Independent End-point Assessor (IEPA) will observe you completing work in your normal workplace or at your provider's site.

Before the Observation, your employer will discuss with you the tasks that you will cover on the day of the Observation, when the Observation will be and what you will need to produce. During the Observation you will be expected to demonstrate to the IEPA the application of specific job-related knowledge, skills and behaviours as outlined in the occupational standard and mapped to this assessment method.

After the Observation, the City & Guilds IEPA will ask you questions. These questions are designed to allow you to support the demonstration of core and specific knowledge, skills and behaviours as listed in the [assessment plan](#).

What will happen in the Observation?

The Observation should be carried out in the following way, to take account of the occupational context in which you operate:

- There may be breaks during the Observation to allow you to move from one location to another as required and for comfort breaks.
- The IEPA must ask all knowledge questions at the end of the Observation, so they do not distract you during the required task.
- The Observation may be made up of a number of tasks but should include an end-to-end process.
- You will be briefed by the IEPA prior to the observation beginning.

The observation

Task brief – Carry out a Logistics / Material handling activity

- This must be based on the apprentice's normal job role
- This must be an end-to-end process.

The following activities **MUST** be observed during the observation:

(For this job role it must include an observation of a production or assembly process)

Core

- Use safe working practices
- Read and interpret instructions
- Carry out a tooling changeover/Process and equipment clean down/Equipment maintenance, e.g. TPM (Total Productive Maintenance)
- Complete relevant records
- Set up and run equipment in accordance with company specifications and standards

Specialism

- Safely move materials to the correct location using the relevant equipment
- Obtain and follow the correct job instructions, specification details and specific transfer/handling procedures in accordance with time constraints and the roles and responsibilities identified for the logistics/material handling activity
- Move materials using the appropriate procedures, ensuring the materials are correct, safely loaded and secure
- Check materials selected to be moved are in line with job requirements
- Carry out quality checks on materials that are to be moved and dealing with quality concerns and damage in line with their responsibilities
- Return equipment to its correct location on completion of the activities and leaving it in a safe and useable condition.

Questions with Answers

You will be asked questions will be asked after the Observation has been completed. The IEPA will ask you up to five questions. They may ask follow-up questions where clarification is required.

How to prepare for the Observation

Ensure that you are wearing appropriate PPE and that the tools, equipment, processes and instructions to carry out the task(s) are available.

Timings

The Observation with Questions and Answers should take a maximum of 2 hours, including questions from the IEPA. The IEPA will observe enough production cycles to be able to accurately assess your competence. The Observation may be split into different sections held over a maximum of one working day. The length of a working day is typically usually 7.5 hours.

The IEPA has the discretion to increase the time of the Observation by up to 10% to allow you to complete a task.

Grading

The Observation with Questions and Answers will be graded Fail or Pass. The City & Guilds IEPA will allocate the grade using the 'Grading criteria' table provided.

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



7. Assessment Instructions: 705 Professional Discussion

Assessment Specification

Description	Coverage	Grade
Professional Development	Knowledge: K1, K2, K3, K5, K6, K7, K22, K23 Skills: S2, S6, S7, S8 Behaviours: B1, B3, B4, B5, B7, B8, B9, B11	X/P/D

Generic Specification

This assessment will take the form of a Professional Discussion, which must be appropriately structured to draw out the best of the apprentice's competence and excellence and cover all of the KSBs relevant to this assessment method.

It will involve the questions that will focus on the knowledge, skills and behaviours relevant to this assessment method which will consider the supporting evidence in the Portfolio of Evidence.

The rationale for this assessment method is:

- It allows for assessment of KSBs that may not naturally occur during the Observation.
- It makes use of naturally occurring evidence collated in the Portfolio of Evidence to support the KSBs mapped to this assessment method.

The Portfolio of Evidence must be compiled during the On-Programme period of the apprenticeship and will typically include five pieces of evidence - it must contain sufficient evidence to demonstrate the KSBs that are mapped to the professional discussion. Evidence must be mapped against the KSBs.

The Portfolio of Evidence will be reviewed by the IEPA. Whilst the evidence in the Portfolio of Evidence is not graded by the IEPA, it will be used to guide the Professional Discussion.

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 provider/employer 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, e.g. drafts, notes, planning etc.

City & Guilds have produced evidence reference forms for both apprentices and IEPAs to use when reviewing evidence produced outside of controlled conditions. These forms include a **Declaration of Authenticity Form** which must be completed when submitting evidence. The forms can be found in the *Provider & Employer Recording Forms Pack*.

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

The IEPA will conduct and assess the Professional Discussion. During this assessment method, the IEPA must ask **a minimum of 10 questions** and should combine questions from City & Guilds question bank and those generated by themselves.

The Professional Discussion will be conducted as set out here:

- prior to the Professional Discussion the IEPA must have reviewed the apprentice's Portfolio of Evidence and tailored/devised questions.
- the apprentice and IEPA may refer to the portfolio of evidence during the Professional Discussion if required.

The purpose of the Professional Discussion is to:

- demonstrate the apprentice can apply the broad range of knowledge, skills and behaviours in the occupational standard that are assigned to this assessment method.
- clarify any questions the IEPA has from their review of the portfolio of evidence submitted
- explore aspects of the apprentice's work, including how it was carried out, in more detail
- enable the IEPA to draw a conclusion from a Professional Discussion for the appropriate grade to be awarded.

The Professional Discussion may be observed by a technical expert who will play the following role:

- provide technical support, advice and guidance such as confirming company policies, procedures, processes, providing context on technical information or on emerging technologies.

Any information provided by the employers' technical expert must only be at the request of the IEPA. The IEPA has the final say over the assessment and grade awarded. The employer technical expert must not provide evidence on behalf of the apprentice or influence the apprentice in any way. The technical expert must not amplify or clarify points made by the apprentice.

The IEPA must use the assessment tools and procedures that are set by City & Guilds to record the Professional Discussion.

It is expected that providers/employers will practice questions and answers with the apprentice relating to the Portfolio of Evidence and the apprentice's job role.

The IEPA will make all grading decisions.

Portfolio of Evidence

The apprentice will have completed a Portfolio of Evidence throughout their On-Programme. The Portfolio of Evidence will be used to inform the Professional Discussion through which the apprentice will demonstrate competence of the broad range of knowledge, skills and behaviours set out in the Standard.

A Portfolio of Evidence will typically include five pieces of evidence - it must contain sufficient evidence to demonstrate the KSBs that are mapped to the Professional Discussion. Evidence must be mapped against the KSBs.

Evidence may be used to demonstrate more than one KSB; a qualitative as opposed to quantitative approach is required.

- Evidence sources may include:
 - training logbooks
 - centre produced worksheets and activities
 - annotated photographs
 - video clips (maximum duration in total 10-minutes)
 - workplace documentation/records, for example job cards/job sheets, equipment check/maintenance/service records, parts order records

This is not a definitive list; other evidence sources are allowable

- The evidence provided must be valid and attributable to the apprentice; the Portfolio of Evidence must contain a statement from the employer confirming this.
- Evidence **must not** include:
 - any methods of self-assessment
 - any employer contributions should focus on direct observation of evidence (for example witness statements) of competence rather than opinions.

Whilst the evidence in Portfolio of Evidence is not graded by the IEPA it will be reviewed and used to guide the Professional Discussion.

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 period of time 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 a number of criteria at once.

From this, they should select evidence that **most efficiently** meets all the relevant criteria, and which demonstrated 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 of the relevant KSBs?*
2. *Is this the **best** evidence I have, showing that I have met all of 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 Professional Discussion. 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 discussion.

The Portfolio of Evidence is not directly assessed but is used as the basis for the Professional Discussion. 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 Professional Discussion.

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.

Assessment environment

The Professional Discussion should take place in a quiet room, free from distractions and influence.

Video conferencing can be used to conduct the Professional Discussion, but appropriate measures must be in place to ensure that the responses given are those of the candidate e.g. use of a 360-degree camera to allow the IEPA to view the room during the Professional Discussion.

Timings

The Professional Discussion must last for **40 minutes**. The IEPA has the discretion to increase the time of the Professional Discussion by up to 10% to allow the apprentice to

complete their last answer. Further time may be granted for apprentices with appropriate needs in line with City & Guilds' Reasonable Adjustment Policy.

Grading

The Professional Discussion 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 fully responsible for making the grading decision. The results are not shared with the apprentice 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.

Please see below for a summary of the recording forms that are available for this assessment.

Recording form	Purpose	Who should complete	Where it can be found
Sample Apprentice Review Form for Employers.	It is expected that the employer will have regular reviews with the apprentice, this form can be used to record these meetings. Employers may devise their own forms or systems (electronic or paper-based). NB: This form is NOT submitted to City & Guilds.	Employer	Provider & Employer Recording Forms Pack
Level 2 Lean Manufacturing Operative – Logistics/Material handling Portfolio Header and Declaration Form	In the evidence reference column, the apprentice should provide a clear reference to the piece of evidence that links to that area of the standard, the evidence needs to be clearly referenced.	Employer/ Apprentice	Provider & Employer Recording Forms Pack
Portfolio of Evidence Checklist	City & Guilds have created a 'Portfolio of Evidence Checklist' to help the provider and employer ensure that all relevant information is accounted for. You must upload the completed evidence reference form to the EPA portal in word format.	Apprentice	Provider & Employer Recording Forms Pack

Apprentice Instructions - Level 2 Lean Manufacturing operative – Logistics/Material handling

Observation with Questions and Answers

A City & Guilds Independent End-point Assessor (IEPA) will observe you completing work in your normal workplace or at your provider's site.

Before the Observation, your employer will discuss with you the tasks that you will cover on the day of the Observation, when the Observation will be and what you will need to produce. During the Observation you will be expected to demonstrate to the IEPA the application of specific job-related knowledge, skills and behaviours as outlined in the occupational standard and mapped to this assessment method.

After the Observation, the City & Guilds IEPA will ask you questions. These questions are designed to allow you to support the demonstration of core and specific knowledge, skills and behaviours as listed in the [assessment plan](#).

What will happen in the Observation?

The Observation should be carried out in the following way, to take account of the occupational context in which you operate:

There may be breaks during the Observation to allow you to move from one location to another as required and for comfort breaks.

The IEPA must ask all knowledge questions at the end of the Observation, so they do not distract you during the required task.

The Observation may be made up of a number of tasks but should include an end-to-end process.

You will be briefed by the IEPA prior to the observation beginning.

The observation

Task brief – Carry out a Logistics / Material handling activity

- This must be based on the apprentice's normal job role
- This must be an end-to-end process.

The following activities **MUST** be observed during the observation:

(For this job role it must include an observation of a production or assembly process)

Core

Use safe working practices

Read and interpret instructions

Carry out a tooling changeover/Process and equipment clean down/Equipment maintenance, e.g. TPM (Total Productive Maintenance)

Complete relevant records

Set up and run equipment in accordance with company specifications and standards

Specialism

Safely move materials to the correct location using the relevant equipment

Obtain and follow the correct job instructions, specification details and specific transfer/handling procedures in accordance with time constraints and the roles and responsibilities identified for the logistics/material handling activity

Move materials using the appropriate procedures, ensuring the materials are correct, safely loaded and secure

Check materials selected to be moved are in line with job requirements

Carry out quality checks on materials that are to be moved and dealing with quality concerns and damage in line with their responsibilities

Return equipment to its correct location on completion of the activities and leaving it in a safe and useable condition.

Questions with Answers

You will be asked questions will be asked after the Observation has been completed. The IEPA will ask you up to five questions. They may ask follow-up questions where clarification is required.

How to prepare for the Observation

Ensure that you are wearing appropriate PPE and that the tools, equipment, processes and instructions to carry out the task(s) are available.

Timings

The Observation with Questions and Answers should take a maximum of 2 hours, including questions from the IEPA. The IEPA will observe enough production cycles to be able to accurately assess your competence. The Observation may be split into different sections held over a maximum of one working day. The length of a working day is typically usually 7.5 hours.

The IEPA has the discretion to increase the time of the Observation by up to 10% to allow you to complete a task.

Grading

The Observation with Questions and Answers will be graded Fail or Pass. The City & Guilds IEPA will allocate the grade using the 'Grading criteria' table provided.

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

Professional Discussion

The Independent End-point Assessor (IEPA) will have a Professional Discussion with you, this will be based on the Portfolio of Evidence you produced during your apprenticeship.

During the Professional Discussion you will be asked **a minimum of 10 questions**. You may refer to the Portfolio of Evidence during the Professional Discussion if you need to.

The purpose of the Professional Discussion is to:

- demonstrate that you can apply the broad range of knowledge, skills and behaviours 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 from a Professional Discussion for the appropriate grade to be awarded.

Assessment environment

The Professional Discussion will take place in a quiet room, free from distractions and influence.

Video conferencing can be used to conduct the professional discussion, but appropriate measures will be in place to ensure that the responses given are yours, e.g. use of a 360-degree camera to allow the Independent End-point Assessor to view the room during the Professional Discussion.

The Portfolio of Evidence

The Portfolio of Evidence is a showcase of your best pieces of evidence, a concise collection of evidence selected from the breadth of available evidence.

The Portfolio of Evidence is not directly assessed by the City & Guilds IEPA but is used as the basis for the professional discussion.

You must provide a clear index showing what is in your Portfolio of Evidence and you must complete the **Portfolio Header and Declaration Form** to ensure that you have sufficient evidence to cover the criteria.

When you are selecting evidence to form your Portfolio of Evidence, it will be reviewed by your employer/mentor. 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 of the criteria.

A portfolio checklist has been provided to assist you and your employer/mentor in assembling your Portfolio of Evidence.

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 period of time from which the evidence should have originated

When you are building your 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 independent in your work, is likely to provide the most holistic evidence, i.e. covering a number of criteria at once.

From this, you should select **five pieces** of evidence that **most efficiently** meets all the relevant criteria, and which demonstrated your **best performance**. If necessary to ensure that all KSBs are evidenced, you can include a small number of additional pieces of evidence for KSBs that are not otherwise covered. 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 you should consider when selecting work to form your Portfolio of Evidence:

- 1. Which pieces holistically (most efficiently) give evidence that together cover all of the relevant KSBs?*

2. Is this the **best** evidence I have, showing that I have met all of the requirements for the higher grade?

Confirming the evidence selection

When you have selected the evidence to form your 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.

A Portfolio of Evidence checklist has been provided to support the provider, employer and the apprentice in the submission of the documentation can be found on page 36.

Guidance on submitting the Portfolio of evidence

Your employer/mentor will submit the Portfolio of Evidence to City & Guilds. The work evidenced in the Portfolio of Evidence must have been carried out by yourself and a signed **Portfolio Header and Declaration Form** must be submitted along with the Portfolio of Evidence. You will need to have access to the Portfolio of Evidence during the professional discussion.

Timings

The Professional Discussion will last for **40 minutes**. The independent assessor has the discretion to increase the time of the professional discussion by up to 10% to allow the apprentice to complete their last answer.

Grading

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

The IEPA is fully responsible for making the grading decision. The results should 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.

Please see below for a summary of the recording forms that are available for this assessment.

Recording form	Purpose	Who should complete	Where it can be found
Level 2 Lean Manufacturing Operative – Logistics/Material handling Portfolio Header and Declaration Form	In the evidence reference column, the apprentice should provide a clear reference to the piece of evidence that links to that area of the standard, the evidence needs to be clearly referenced.	You and provider/ employer	Provider & Employer Recording Forms Pack
Portfolio of Evidence Checklist	City & Guilds have created a 'portfolio checklist' to help apprentices and employers ensure that all relevant information is accounted for. You must upload the completed evidence reference form to the EPA portal in word format.	You	Provider & Employer Recording Forms Pack

Portfolio of Evidence Checklist

Apprentice portfolio checklist		Tick when confirmed
1.	Is all evidence signed by the apprentice and dated? * E-signatures are also acceptable	
2.	Is all evidence valid, authentic, current and sufficient (VACS)?	
3.	Does evidence clearly show it is the apprentice's individual work (and if involved in teamwork, is it clear what specific contribution the apprentice made)?	
4.	Does the evidence clearly demonstrate the apprentice's relevant knowledge?	
5.	Has the apprentice used the evidence reference form? And has all evidence been referenced, where applicable?	
6.	Does it showcase the apprentice's best pieces of work?	
7.	Have duplicate and irrelevant pieces of evidence been removed?	
8.	Is there sufficient evidence to cover the whole of the KSBs and grading descriptors that are referenced?	
9.	Are any witness testimonies or employer references tailored to the apprentice, where applicable?	
10.	Has any client/customer reference information been anonymised?	
11.	Are all external sources of information appropriately documented and referenced to the original source, showing clear understanding of how they relate to the criteria?	
12.	Has the appropriate stakeholder(s) e.g. provider/employer checked whether the apprentice's portfolio meets all the required criteria and grading descriptors?	
* where witness testimonies are included as a piece of evidence, these do not need to be signed by the apprentice but instead must be signed/authenticated as outlined in the rest of the EPA pack		
Reminder: The Apprentice must upload the completed 'Portfolio of Evidence Checklist' to EPA Pro in Word format.		

8. Re-sits & Re-takes

Apprentices who fail one or more assessments will be offered the opportunity to take a re-sit or re-take:

- A re-sit is where the apprentice takes the assessment again without the need for new learning
- A re-take is where the employer determines new learning is needed first.
- Any assessment method resit or retake must be taken within **16 weeks** of the Fail notification, otherwise the entire EPA must be taken again, unless in the opinion of the City & Guilds exceptional circumstances apply outside the control of the apprentice or their employer.



Assessment Method 1

Provider & Employer Instructions

If a re-sit/re-take relates to the Observation with Questions and Answers the apprentice must be presented with a different task, which must cover the same components/activities.

The Observation with Questions and Answers will be carried out in the same way as the original assessment and cover the same components, but the Task will be different.

Please refer to the Assessment Instructions: Observation with Questions and Answer, in this pack.

Apprentices should be given feedback on the KSBs that were not met previously and the opportunity to practice these KSBs.

Submission must include

A new set of Recording Forms for the re-sit/re-take should be submitted. These must refer to the version of recording forms submitted originally.

Apprentice Instructions

If a re-sit/re-take relates to the Observation with Questions and Answers you will be presented with a different Task, which covers the same components/activities.

You will be observed carrying out a new Task.

You should have received feedback on the KSBs that you didn't meet previously.

Assessment Method 2

Provider & Employer Instructions

If the re-sit/re-take relates to the professional discussion, the IEPA will question the apprentice on the same subject area but using a different set of questions.

The Professional Discussion will be carried out in the same way as the original assessment. The IEPA may review the portfolio of evidence to ensure all the KSBs are evidenced. They must choose different questions.

Please refer to the Assessment Instructions: Professional Discussion, in this pack.

Submission must include

A new set of Recording Forms for the re-sit/re-take should be submitted. These must refer to the version of recording forms submitted originally.

Apprentice Instructions

If the re-sit/re-take relates to the professional discussion you will be questioned on the same subject area but using a different set of questions.

Review your Portfolio of Evidence and the feedback you have been given to prepare for the IEPAs visit.

Contact Us

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Who we are

City & Guilds Limited (Registered Company 16513878) is the Awarding Organisation for City & Guilds qualifications.

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.

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