

# Level 3 Public Service Operational Delivery Officer 9717

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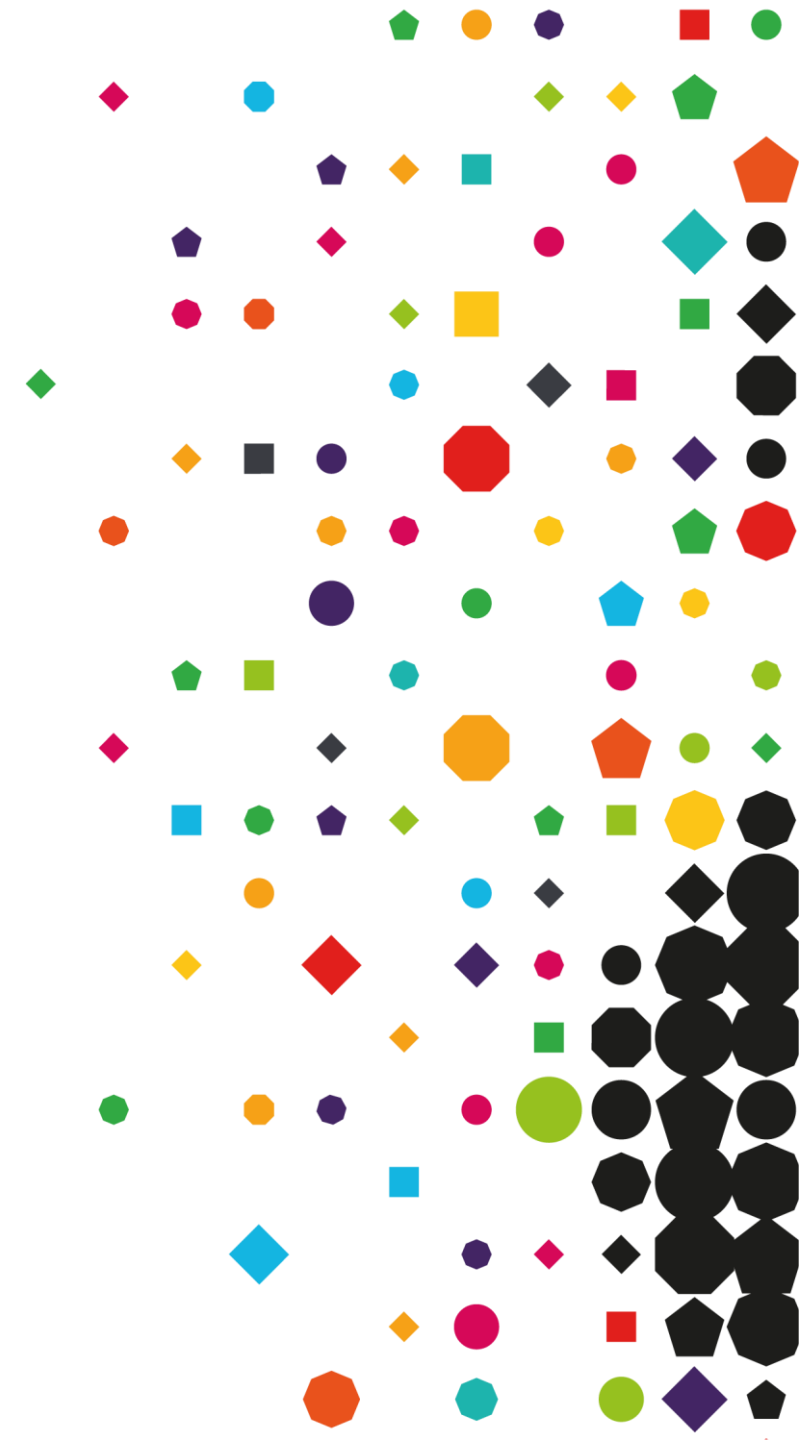
**Thursday 17<sup>th</sup> June 2021**

# Objectives of today

- Overview
  - WBP
  - PD underpinned by portfolio
- Lessons Learned (LIEPA)
- Support
- Summary
- Q&A



This webinar is being recorded and will automatically be sent to every attendee no later than tomorrow.



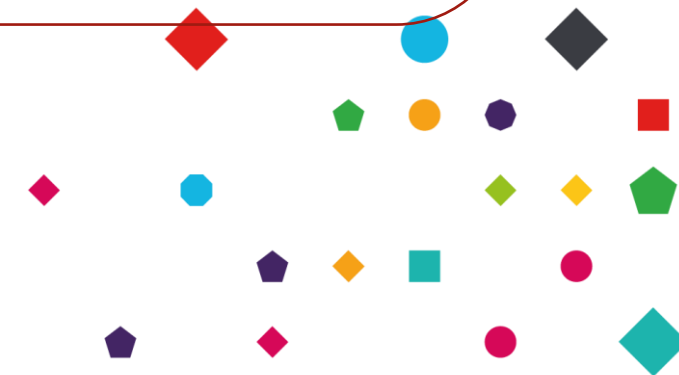
# Before EPA apprentices must complete:

Level 2 Award in Operational Delivery (principles)

Level 3 Certificate in Operational Delivery (advanced)

L2 Functional Skills qualification in English and Maths or equivalent (if they don't already hold one)

Portfolio of evidence



# EPA Assessment Methods - 9717

Two assessment methods!

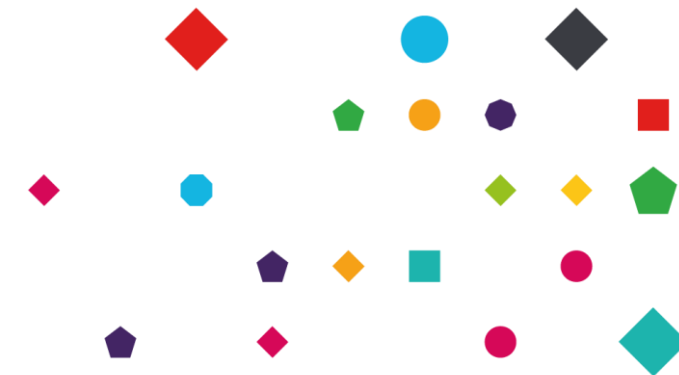


**Work based  
project –  
presentation  
and Q&A**



**Professional  
Discussion  
(underpinned by  
a portfolio of  
evidence)**

EPA must be completed within an **EPA period** lasting a **maximum of 6 months** (beginning when the apprentice has passed the EPA Gateway)





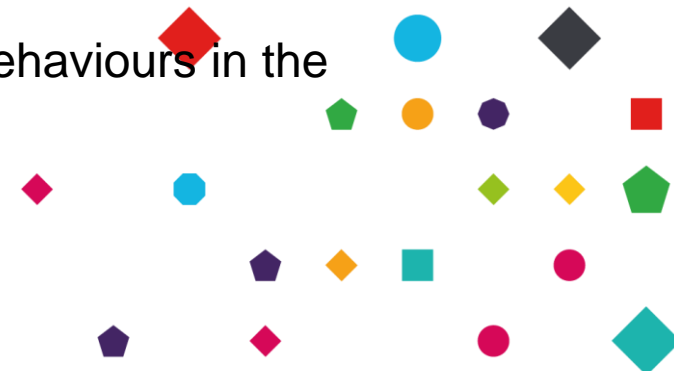
Assessment Method 1

# Work Based Project



# Work Based Project plus Presentation

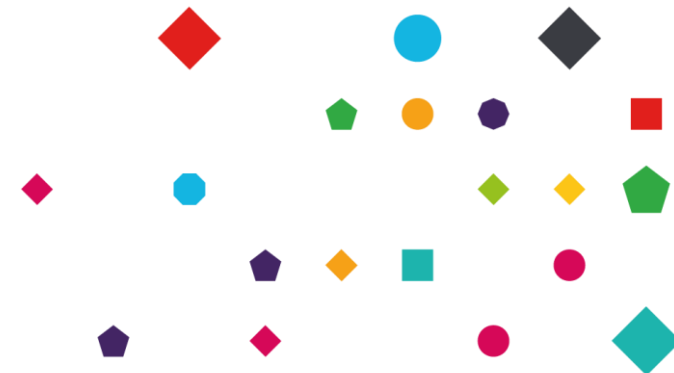
- The project is **compiled after** the apprentice has gone through the Gateway Process.
- Project subject, title and scope must be agreed between you, the employer, and the apprentice and submitted to City & Guilds within 2 weeks after the Gateway process.
- The project cannot start until approved by an IEPA. If the proposal fails, it must be amended and returned ASAP.
- The project must be completed and submitted to City and Guilds within **18 weeks (but your training provider might work to a shorter timeframe)**.
- The project report should be 2500 words.
- Work based project and presentation **must** represent the skills, knowledge and behaviours in the Standard assigned to the project.



# Work Based Project plus Presentation



- The project cannot start until approved by an IEPA.
- If the proposal fails, it must be amended and returned ASAP.
- Ensure the learner takes on board the IEPA feedback when amending the proposal

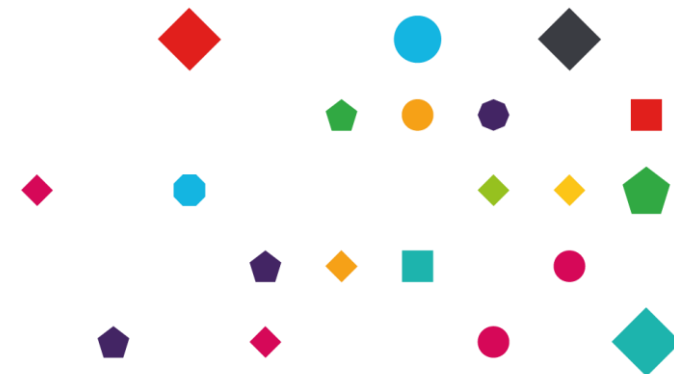


# Work Based Project



The Project should show:

- The project should cover all assessment criteria
- their use of different analytical development techniques in the workplace to identify and produce key findings and judgements in assessments;
- how they identified gaps and opportunities for further analysis;
- how they engaged with clients, their own organisation and other interested parties and should explain their own critical thinking in both their analysis and generation of their overall findings and recommendations.



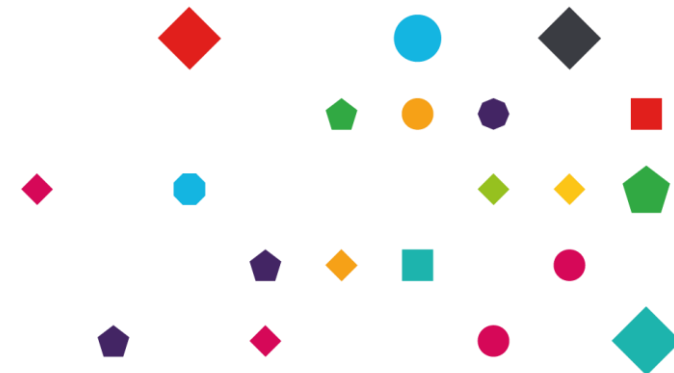


# Work Based Project – best practice

## Planning is key!



- Discuss project requirements
- Ensure they know the assessment criteria that need to be covered
- Once the apprentice passed the Gateway, discuss and agree the project plan. It should:
  - follow the guidelines
  - be achievable within the time given
  - provide sufficient evidence
  - is a piece of work that the team or department can implement!

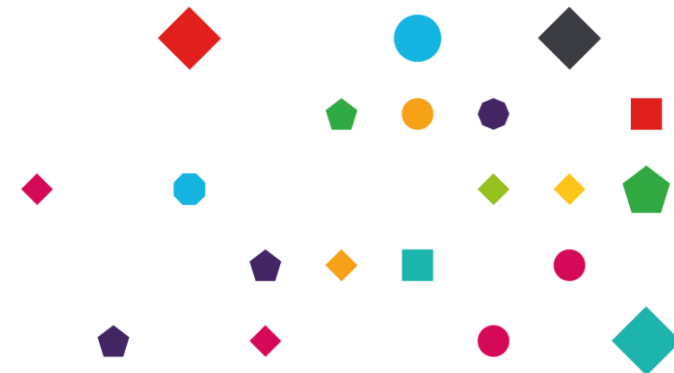


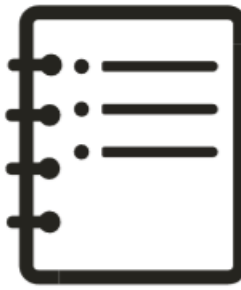
# Work Based Project – best practice

## Planning is key!



- Make sure apprentices have access to resources
- Agree and allocate sufficient time to carry out all activities required.
  - Remember, they have to have time to plan, carry out research and activities
- The provider/employer should read the project report and give constructive feedback! Help the apprentice to analyse the project and map the potential evidence against the KSBs of the assessment plan.

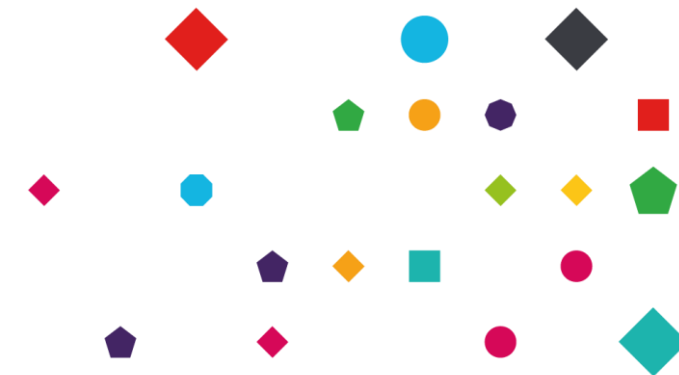




# Work Based Project Guidance

## Project report structure should include the following:

- Introduction (covering scope of the project and title)
- Background (providing a summary of the reasons for undertaking the project)
- Aims and objectives
- Research and methodology
- Outcomes (providing a review and analysis of the apprentice's research which would include discussions and feedback from stakeholders)
- Business implications (the impact of the proposals on the business/considerations to take into account after discussions with stakeholders)
- Recommendations (proposals for implementation)
- Conclusions (review success measures and reflect on own performance)





# Work Based Project Guidance

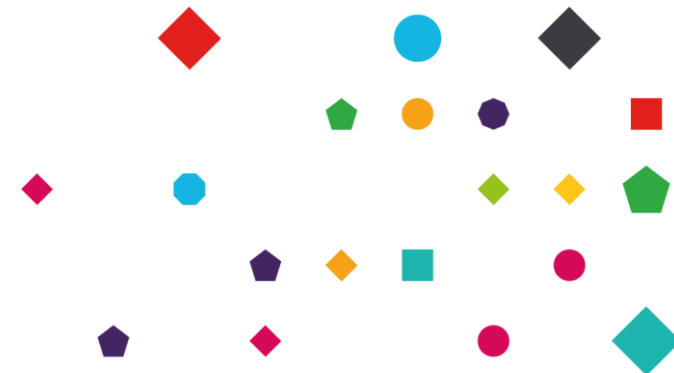
## Examples of Project Themes

The themes below are high level suggestions.

This is not an exhaustive list - apprentices can draw from experiences within their own department and team. You, the line manager are a key person to help find a suitable project based on the objectives and workload of your team/section/department.

Use this opportunity to ask your apprentice to conduct a piece of work that will be directly beneficial to your organisation!

The titles below are examples only. The project proposal submission sheet needs to be completed in order for the project to be approved.



# Work Based Project Guidance

## Examples of Project Themes



**Process improvement projects** could be based on areas such as:

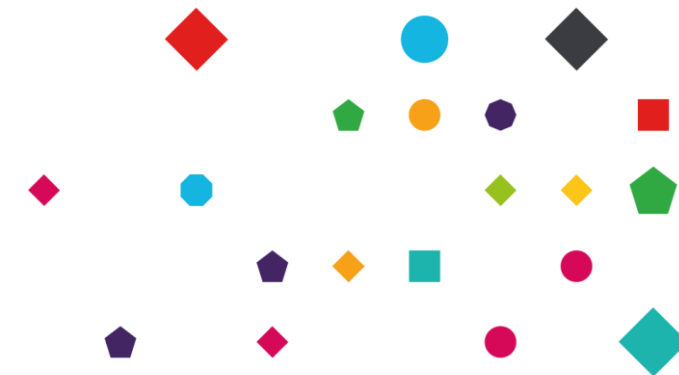
- Ways of sharing good practice
- Streamlining/standardizing processes
- Upskilling staff and customers on technology

**Delivery of service** projects could be based on areas such as:

- Issues relating to modes of delivery e.g. face to face/remote
- Customer service for people with social needs

**Communication strategy projects** that impact on customers such as:

- internal/external communication
- working with/in the community
- working with stakeholders
- information collection and dissemination.
- **Matrix working projects** to provide service or support to customers such as:
  - improved collaboration across teams/departments/organisations
  - multi-agency working.





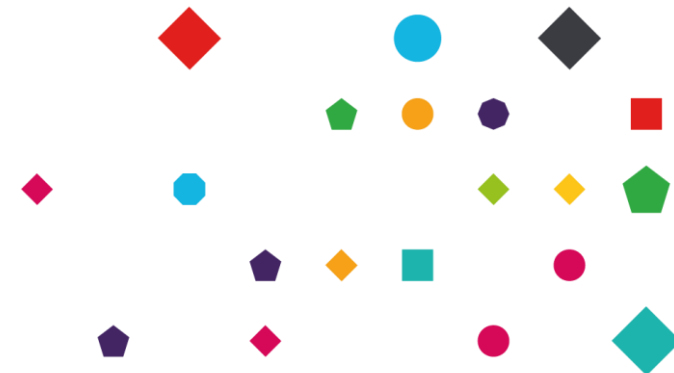
# Work Based Project plus Presentation

The presentation will be based on the project and provide an **overview of the project** e.g.

- based on a need to solve a work-based problem
- to review an aspect of working practice
- to introduce a new way of working

Presentation will last for 15 minutes (+10% at the discretion of independent assessor)

There will be a mandatory 15 minute Q&A session (+10% at the discretion of independent assessor)



# Documents to Support

Exemplar – Completed work based project submission sheet

Level 3 Public Service Operational Delivery Officer (9717-12) EPA exemplar materials		City & Guilds   SmartScreen	
Work-based project guidance			
Example work-based project submission for approval and declaration of authenticity form			
Apprenticeship Standard	Level 3 Public Service Operational Delivery Officer		
Apprentice name	Billy Hughes	Enrolment number	ENR426
Gateway submission date	02/03/2020	Final submission date (14 days after gateway)	09/03/2020
<b>Project title</b>			
Improving the customer service experience for people who visit the county council office to access services and support			
<b>Project scope and terms of reference</b>			
<ul style="list-style-type: none"><li>• The project is based at county council offices in the reception area where customers access services and support. The project will be conducted over one week.</li><li>• The objective of the project is to identify if improvements can be made to the quality and speed of customer service given to different customer groups (e.g. families with children, vulnerable groups) who visit the council to access a range of services (B10, K1, K2, B6).</li><li>• I will develop a questionnaire which customers will complete in writing or electronically (using an iPad). I will also interview staff to gather their opinions on customer service improvements. I will create posters to inform customers a survey is being delivered to customers visiting the council (S2, S4, S7).</li><li>• Customers will be asked to rate and comment on their customer service experience and suggest recommendations for improvement (K2, S1, B1).</li><li>• I will create a spreadsheet to enter the results of the questionnaires (S4, S7)</li><li>• I will analyse the feedback received from customers and staff and make recommendations to change/improve services (S6, B2)</li><li>• I will present a report to my manager on how the council can manage a quality service for customers who visit the council in person (K2, S1, S2, S6, B1, B6)</li></ul>			
<b>Initial project plan</b>			
Week commencing:			
<ul style="list-style-type: none"><li>• 23/03/20 Create survey and posters for project, develop spreadsheet for data collection.</li><li>• 06/04/20 Conduct project.</li><li>• 13/04/20 Complete spreadsheet with data and information.</li><li>• 27/04/20 Analyse data and information and identify recommendations.</li><li>• 04/05/20 Create a briefing report for managers/deliver presentation to managers.</li><li>• 11/05/20 Complete project report for apprenticeship.</li></ul>			





## Assessment Method 2

# Professional Discussion underpinned by Portfolio of Evidence

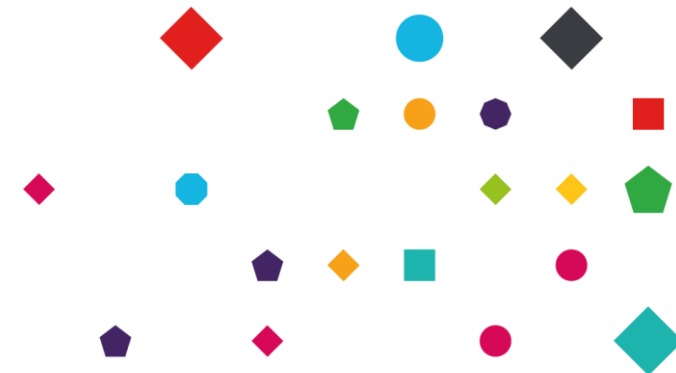


# Portfolio of Evidence Guidance



Work Performance evidence must be the main form of evidence gathered for the apprentice's portfolio.

- Consistent performance (different examples of performance required that show consistent performance at work)
- reflective accounts and self-evaluation are **not** to be used
- why has the evidence been used
- Authenticated by a credible person
- Evidence must show personal development throughout the whole period
- Provider & manager's, appraisals and reviews can be included to demonstrate progression
- Evidence of projects, initiatives, working with other teams to share/obtain new skills can be used
- written, audio, and video formats



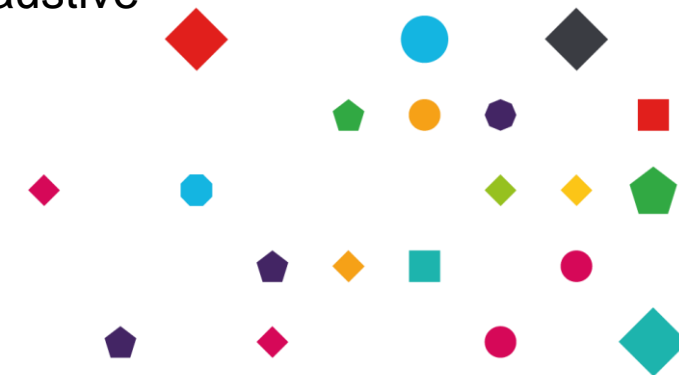
# Portfolio of Evidence Guidance



## Examples of evidence Types:

- Planning, e.g. how they plan workload, target setting, achieving goals
- Personal Development records - feedback from managers, CPD and how they continuously improve
- Reports or Documents - respond to customer's needs, solve problems through action logs, case notes etc
- Minutes of meetings with line managers, peers, stakeholders
- Evidence of customer interaction (internal and external) e.g, correspondence /records of meetings
- Evidence of where they have shared good working practice (formal or informal methods) such as peer group discussions, team meetings
- Observations/Witness testimonies (providing quality customer service, quality of advice given)
- IT systems e.g. filing and information retrieval, selection and use of IT applications, correctly applying security measures, reporting faulty equipment

Apprentices can produce evidence from their own job role – this list is not exhaustive





# Portfolio Structure

Typically the portfolio structure **could** be along the lines of:

- *Title page – Learner name – employer ENR number*

*Contents page*

- *Mapping document to the standard with Case study/Evidence Set number – suggested around 6 to fully cover the standard.*
- *Evidence sets often contain a written report and screen shot evidence/witness testimony but there are different types of evidence that can be added.*

*Evidence Set 1 (e.g. dealing with a customer complaint)*

*Evidence Set 2 (e.g. meeting a customer requirement)*

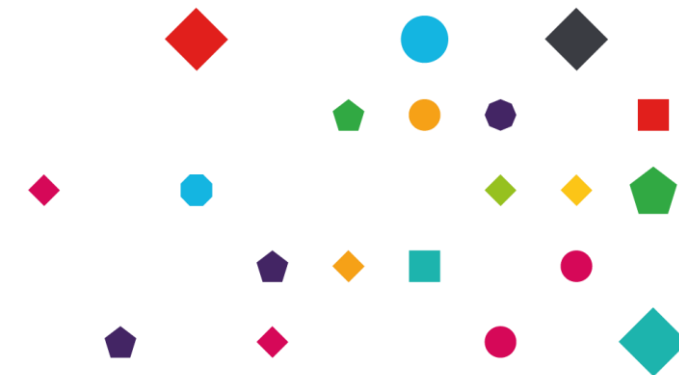
*Evidence Set 3 (e.g. training and development)*

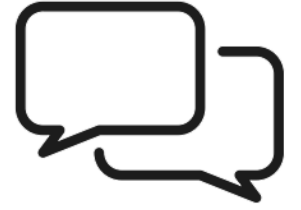
*Evidence Set 3 (e.g. probation review )*

*Evidence Set 4 ( e.g. processing a customer claim)*

*Evidence Set 5 (e.g. supporting a customer with a specific need)*

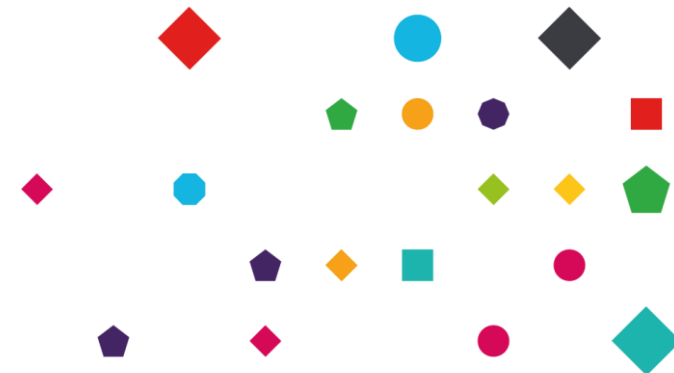
*Evidence Set 6 (e.g. working with colleagues to achieve a project outcome)*





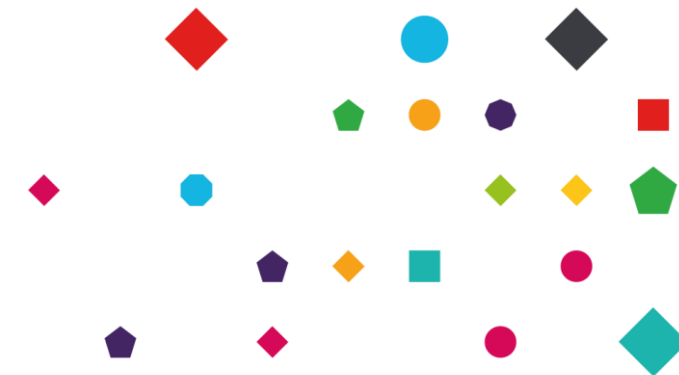
# Professional Discussion - Guidance

- Structured discussion between Apprentice and Independent End Point Assessor
- Minimum of 60 minutes (10% tolerance above 60 minutes)
- Learners may be able to apply for further time under the Reasonable Adjustments policy if this is evidenced prior to EPA



# EPA Grading

- Distinction, Pass or Fail
- Apprentices must pass **both** assessment methods worth 50% each to achieve a pass for overall grading
- Apprentices must achieve distinctions in **both** assessment methods to receive a distinction for overall grading



# Lessons Learned so far

## A Lead Independent Assessor's overview

## Why are learners not achieving a distinction grade?

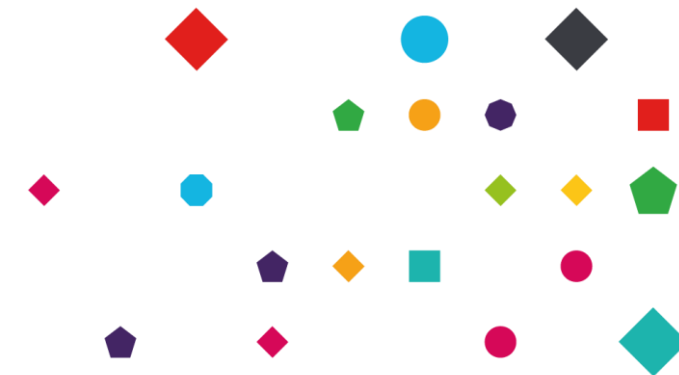
### Showcase Portfolio – lessons learned.

The pass descriptor says,

**“A pass grade is an indicator there were aspects of the standard and evidence (in respects to quality, range, selection and depth) which could have been developed further”**

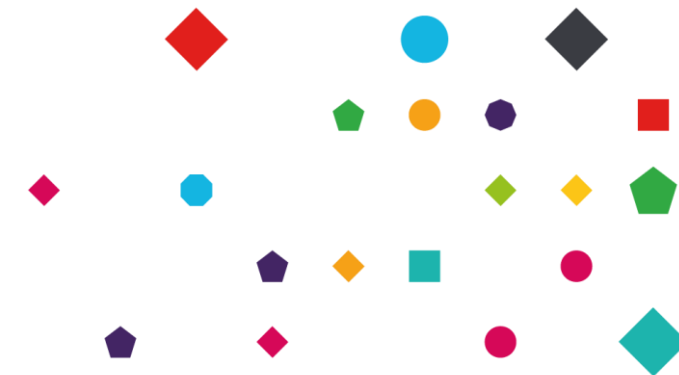
Key areas where this is the case:

- Customer service. There needs to be a clearer understanding of internal and external customers. This is a challenge with telephony, but the apprentice has to provide compelling evidence that the customer is the focus of all they do. They need to show how they provide customer service to the most in need and vulnerable.



## Why are learners not achieving a distinction grade?

- Managers evidence must be verifiable. The names and signatures of managers and their role etc should not be removed.
- Changing descriptor wording -  
It is becoming the norm that apprentices give an explanation as to how they have met the standard often in a statement at the end of each evidence set or in text boxes throughout the portfolio. They often just change some of the wording the in the standard descriptor. We cannot verify many of the statements made. For example: “2.2 – I work on the telephones giving support to a diverse range of customers who come from different communities, have different needs, rights, expectations.”
- *2.2. Customers - Understanding the diverse range of customers and communities, and their needs, rights and expectations, from individuals to the biggest multi-national businesses*

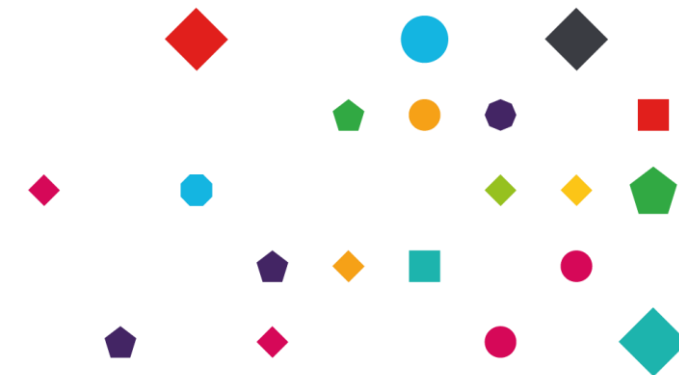




## Why are learners not achieving a distinction grade?

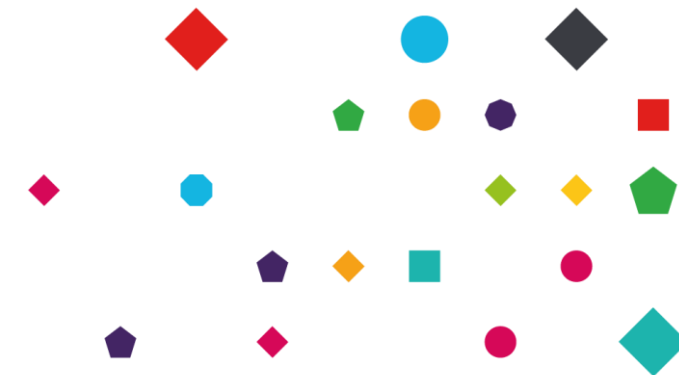
### Project- Lessons Learned

- Projects **must** show the impact (actual or perceived) they will have on customers (internal and external). Too often this is weak in respects to the external customer.
- The basis of research must be provided, such as research in the form of data gathered or if quantitative research is not undertaken, other types of research must be explained (e.g. a review of specific policies and procedures).
- Reasons for decisions should be given. What were the other options for consideration?
- Evidence of planning is often weak. Remember it should be included. The project plan allows for this, but it is not often completed fully.

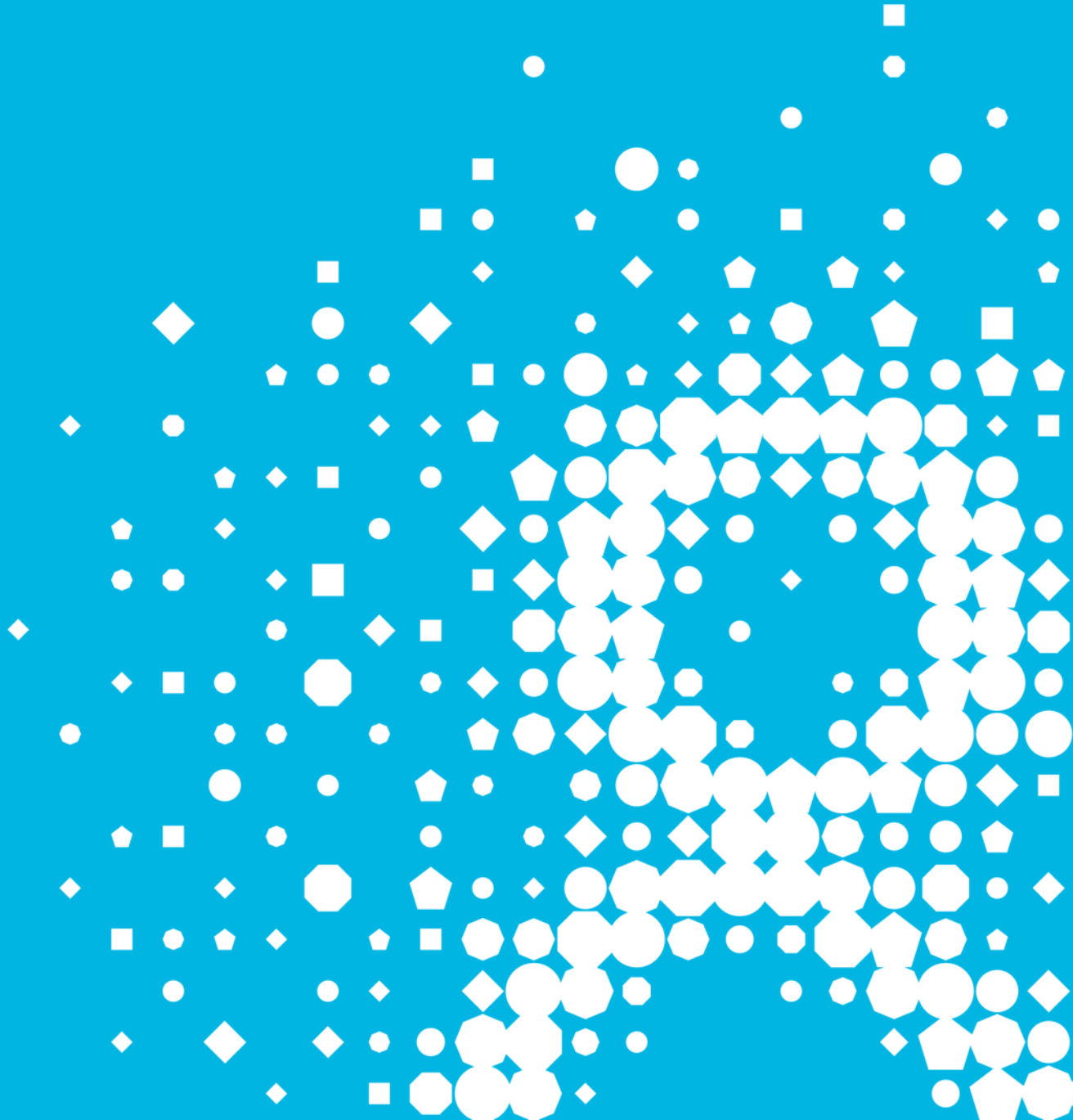


## Why are learners not achieving a distinction grade?

- Apprentice's job role is key to meeting KSBs . If the job role is limited (eg due to Covid-19), think how you might carousel into different roles e.g. to deal with different types of customers, not only on phone, perform additional tasks, take part in various work streams etc.
- Projects not always relevant to apprentices job role. Although this is allowed it does seem to make it more difficult to meet Knowledge Skills Behaviours that are key to the Standard
- legislation, policy and procedure is weak. Often there is little reference to these. Whilst this is inferred it is not explicit in name or application.



# Supporting City and Guilds Documents



# Documents to support

**City & Guilds**

## Level 3 End-point Assessment for ST0314/AP04 Public Service Operational Delivery Officer (9717-12) Version 2

October 2019 Version 01

**End-Point Assessment Pack**  
For Centres / End-Point Assessment Customers / Employers

**City & Guilds | ilm**  
A City & Guilds Group Collaboration

### Mapping Guidance from 3817 (Version 1) to 9717 (Version 2)

The document has been designed to support the apprentice to understand:

- The way Version 2 (9717) is numbered, and how mapping can be transferred from Version 1 (3817) to Version 2 (9717)
- The changes in assessment requirements from Version 1 (3817) to Version 2 (9717) in relation to the portfolio and project
- The change in requirements for achieving a distinction between Version 1 (3817) and Version 2 (9717)

Key for all tables used

Version 1 (3817)	Version 2 (9717)
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### Change in assessment requirements

The following table shows the change in assessments from 4 standalone assessments in Version 1 (3817) to 2 assessments in Version 2 (9717). It is important to acknowledge that whilst there are similarities between the two assessments there are significant changes to the end-point assessment, the allocation of the KSBs assigned to Version 2 (9717) and the types of evidence that may be submitted in for the portfolio of evidence.

Version 1 (3817)	Version 2 (9717)
702 Project 703 Presentation	701 Presentation based on a project with questions and answers
701 Showcase portfolio 704 Interview	702 Professional discussion based on a portfolio of evidence

Table 1 – change in assessment from Version 1 (3817) to Version 2 (9717)



# Documents to support – Exemplar material

Level 3 Public Service Operational Delivery Officer (9717-12) EPA exemplar materials

City & Guilds SmartScreen

Portfolio guidance

## Portfolio guidance

### Tutor guidance

#### Overview

The portfolio is a collection of the apprentice's best workplace gathered from the start of the apprenticeship. The portfolio of evidence consists of **10** pieces of evidence and a **maximum of 15** pieces of evidence.

The portfolio must cover the Knowledge, Skills and Behaviours standard\* listed below.

<b>K3</b> Range of services	<b>S1</b> Customer service
<b>S2</b> Communicating effectively	<b>S3</b> Working together
<b>S5</b> Negotiating and influencing	<b>S6</b> Problem solving and decision making
<b>S8</b> Professionalism, self-management and awareness	<b>B3</b> Leading and communicating
<b>B4</b> Collaborating and partnering	<b>B5</b> Building capability for all
<b>B7</b> Delivering at pace	<b>B8</b> Integrity
<b>B9</b> Honesty	<b>B11</b> Impartiality

\*For full details of the KSBs please refer to the 'Public Service Apprenticeship Standard for 702/752 Professional discussion evidence' table, which is included at the end of this guidance document.

The independent end-point assessor (IEPA) will review the portfolio of evidence and the professional discussion.

#### Structure

The portfolio of evidence must include:

- Portfolio Evidence Matrix and Declaration of Authenticity: apprentices are required to describe and map each piece of evidence to the KSBs in the apprenticeship standard. A declaration of authenticity must be signed and dated by the apprentice.
- A wide range of evidence which is directly attributed to the workplace. The evidence selected must show the apprentice's contribution to the services offered by the employer and how they work professionally to achieve the requirements of the apprenticeship standard.

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Level 3 Public Service Operational Delivery Officer (9717-12) EPA exemplar materials

City & Guilds SmartScreen

Presentation guidance

## Presentation of work-based project with Q&A

### Tutor guidance

The apprentice is required to deliver a presentation of their project to the independent end-point assessor (IEPA) on a one-to-one basis. The employer may be present but to observe only. The presentation will be delivered either face to face or via online video conferencing. This will be followed by questions and answers.

Whilst the presentation is based on the work-based project it must clearly show how the project meets each of the Knowledge, Skills, Behaviours (KSBs) in the apprenticeship standard\* listed below.

<b>K1</b> Legislation, policies and procedures	<b>K2</b> Customers
<b>S1</b> Customer service	<b>S2</b> Communicating effectively
<b>S4</b> Gathering and managing information	<b>S6</b> Problem solving and decision making
<b>S7</b> Tools and equipment	<b>B1</b> Changing and improving
<b>B2</b> Making effective decisions	<b>B6</b> Managing a quality service
<b>B10</b> Objectivity	

\*For full details of the KSBs please refer to the 'Public Service Operational Delivery Officer Apprenticeship Standard for 701/751 Work-based project followed by a presentation and questions and answers' table, which is included at the end of this guidance document.

#### Format of the presentation

The presentation must be formally delivered to the IEPA in a professional manner. You must support the apprentice to prepare for the presentation by giving them the opportunity to practice the presentation before the end point assessment (EPA). This will help the apprentice to build their confidence in delivering the presentation fluently. It will also enable you to recommend improvements to the presentation and to check it can be delivered within the allocated time.

The presentation must be a summary of the work-based project so it is not appropriate for apprentices to read the project report verbatim.

#### Use of presentation tools/software

The apprentice can use presentation tools such as PowerPoint, video clips, flip charts and work products when delivering their presentation. Any requests for presentation resources must be made at least **one week** prior to the scheduled date for the presentation.

If presentation software is used, such as PowerPoint, we recommend a maximum of 10 presentation slides are used. Slides should be used to facilitate the delivery of the verbal presentation rather than using these as the script. If the presentation is delivered face to face, a copy of the presentation should be given to the IEPA.

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Level 3 Public Service Operational Delivery Officer (9717-12) EPA exemplar materials

City & Guilds SmartScreen

Professional discussion guidance

## Professional discussion

### Tutor guidance

#### Overview

The professional discussion is a structured one-to-one discussion between the apprentice and the independent end-point assessor (IEPA). The discussion is based on the portfolio of evidence the apprentice has submitted and is worth **50%** of the overall grade of the apprenticeship.

The professional discussion will take place in a quiet room, free from distractions and will be conducted away from the apprentice's workstation. This may take place in the premises, a venue arranged by the apprentice's training provider or virtually using video conferencing.

The professional discussion will typically last for **60 minutes** although the IEPA has the right to increase the time by up to 10% to allow the apprentice to complete the last answer.

#### Purpose

The purpose of the professional discussion is for the IEPA to authenticate and validate the evidence the apprentice has presented in the portfolio and to assess if they have covered all the Knowledge, Skills and Behaviours (KSBs) in the apprenticeship standard\* listed below.

<b>K3</b> Range of services	<b>S1</b> Customer service
<b>S2</b> Communicating effectively	<b>S3</b> Working together
<b>S5</b> Negotiating and influencing	<b>S6</b> Problem solving and decision making
<b>S8</b> Professionalism, self-management and awareness	<b>B3</b> Leading and communicating
<b>B4</b> Collaborating and partnering	<b>B5</b> Building capability for all
<b>B7</b> Delivering at pace	<b>B8</b> Integrity
<b>B9</b> Honesty	<b>B11</b> Impartiality

\*For full details of the KSBs please refer to the 'Public Service Operational Delivery Officer Apprenticeship Standard for 702/752 Professional discussion underpinned by a portfolio of evidence' table, which is included at the end of this document.

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Level 3 Public Service Operational Delivery Officer (9717-12) EPA exemplar materials

City & Guilds SmartScreen

Work-based project guidance

## Work-based project

### Tutor guidance

The purpose of the project is for apprentices to utilise the experience gained in the workplace to identify a new opportunity or change that can positively impact on an aspect of work within the public service operational delivery profession. **The project selected must be based on an aspect of the apprentice's working role.** It must enable them to show an understanding of the Knowledge, Skills and Behaviours (KSBs) in the apprenticeship standard\* listed below:

<b>K1</b> Legislation, policies and procedures	<b>K2</b> Customers
<b>S1</b> Customer service	<b>S2</b> Communicating effectively
<b>S4</b> Gathering and managing information	<b>S6</b> Problem solving and decision making
<b>S7</b> Tools and equipment	<b>B1</b> Changing and improving
<b>B2</b> Making effective decisions	<b>B6</b> Managing a quality service
<b>B10</b> Objectivity	

\*For full details of the KSBs please refer to the 'Public Service Operational Delivery Officer Apprenticeship Standard for 702/752 Work-based project followed by a presentation and questions and answers' table, which is included at the end of this guidance document.

#### Choosing the project topic:

It is important that you support apprentices to consider the following questions:

- Will the project allow the apprentice to meet the requirements of the KSBs in the apprenticeship standard being assessed?
- What will be the impact of the project on internal and external customers?
- Can meaningful research be gathered to support the project?
- Is the project realistic? Is the project too big/too small? Could the project be implemented?

As the project is assessed independently, it is essential the apprentice does not undertake a project of such a sensitive nature that the report cannot be written without contravening the principles of the General Data Protection Regulation (GDPR). In addition, a project cannot be marked fairly if the information contained within it is blanked out.

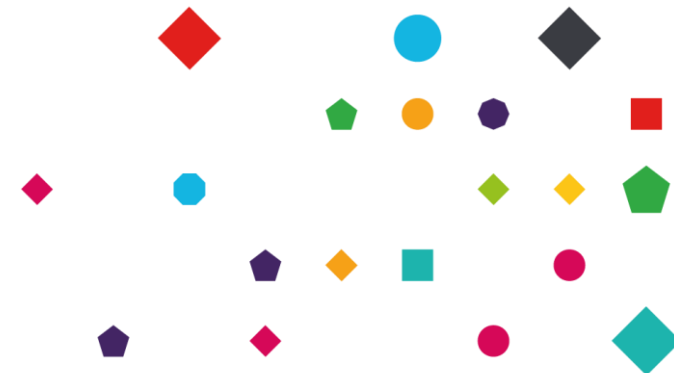
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# Summary

- **Two assessment processes in 9717 instead of four in 3817**
- **Both assessments are equally weighted and can be taken separately**
- **The gateway process is managed by the EPA team as before, but the first change is project approval**
- **The project proposal is considered by the IEPA and approved or rejected**
- **The Apprentice will commence the project after gateway and once the approval has been given by the IEPA**
- **The Showcase Portfolio is now a Portfolio of evidence**
- **The portfolio has allocated KSBs (Knowledge, Skills and Behaviours) different from 3817 where previously the SCP covered all of them.**
- **The Portfolio is reviewed (as before) to consider how the KSB (Knowledge, Skills and Behaviours) are met**
- **The project is not reviewed to give a grade but is reviewed to identify questions**
- **The project is supported by a presentation within the second part of the assessment and questions asked ensuring the KSBs are covered.**
- **Do not include reflective accounts!**



# Q&A, Thank you

