L4 Junior Management Consultant APPRENTICESHIP HANDBOOK

An overview and guide for Apprentices and Employers

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LIST OF CONTENTS

INTRODUCTION

INTRODUCTION	
Occupational profile	3
Qualification Details	3
WHAT TO EXPECT	
The Apprenticeship Journey - including choosing your programme through to your options after end point assessment	4
END POINT ASSESSMENT	
What is an endpoint assessment?	6
Things you need to know about the Reflective Portfolio assessment method	7
Things you need to know about the Presentation and Q&A assessment method	8
The overall grading decision	8
FURTHER INFORMATION	
Information regarding resits and/or retakes	9
Information regarding appeals	10
Information regarding reasonable adjustment and special consideration requests	10
Information regarding recognition of prior learning	10
APPENDICES	
1. Glossary of key terms, words, phrases	11
2. Which KSBs are assessed within each assessment method	13
3. List of CMI command verbs	15
4. Version history	16

INTRODUCTION

Occupational Profile

Welcome to the CMI Qualification Specification document for the L4 Junior Management Consultant Occupational Standard. This document has been developed to help you, as a potential apprentice or employer of an apprentice, to choose your end point assessment organisation and/or to answer any questions you may have regarding undertaking an apprenticeship.

Management consultants provide business advice to public, private and not-for-profit organisations. This usually involves helping them solve a challenge of some kind, such as how to grow their business, how to make it more efficient or how to organise and structure itself in a different way. Some specialist consultancies have a particular focus – for example, how to write proposals for new work, or how to change an organisation or how to develop their workforce. Others are more generalist and you could work across several different types of projects. Working on a client site away from your office is a possibility, while hours are varied and often depend on the project.

Tasks can be varied. The apprentice might be involved in conducting research, analysing and interpreting data or be responsible for organising the logistics of the project. As they develop and progress, they might be involved in contributing to report writing which uses statistical evidence to support recommendations and conclusions, or support the creation of slide decks to deliver key messages to clients. The apprentice might also become more focused on a particular type of service offering (financial, strategic, operational, etc.) or industry (financial services, public sector, telecommunications etc.)

Qualification Details

IfATE Occupational Standard	Apprenticeship Qualification Title	Ofqual Qualification Reference Number
ST Code: ST0273	CMI Level 4 Junior Management	610/0202/1
Date Approved For Delivery:6 April 2016	Consultant	
Latest version: 1.0 06/04/2016		
Typical duration to Gateway (excluding EPA period): 24 months		
Maximum funding: £9000		

The qualification reference number is the number allocated to CMI by Ofqual, as the External Quality Assurance Regulator, on approval of our recognition to undertake endpoint assessments for this occupational standard.

WHAT TO EXPECT

The Apprenticeship Journey

Your end to end apprenticeship journey is likely to be split into the following 5 stages:

	1
Choosing Your Programme and Training Provider	See the <u>UCAS Apprenticeship</u> page or the <u>Gov.uk Find An Apprenticeship</u> page for more information and/or to find possible apprenticeship opportunities within your area. Apprentices need to be currently working in the role of a professional manager (see notes above regarding the occupational standard). Apprentices need to live and/or work in England to be eligible for their employer to utilise their levy funding.
Completing The On-Programme Assignments, Modules, and Activities	This is when apprentices develop the knowledge, skills, and behaviours (KSBs) of the occupational standard. It is also where apprentices complete their on-programme activities and are working towards English and mathematics level 2, if required. Towards the end of their on-programme activities, apprentices will need to have completed their portfolio of evidence. The typical duration for this stage of the journey is 24 months
Passing Through Gateway	 Gateway is the point of the journey where apprentices move from learning to demonstrating the knowledge, skills, and behaviours (KSBs) within the occupational standard. Before an apprentice is able to undertake their end point assessment (EPA), their employer must confirm that the apprentice is working is consistently working at, or above, the level of the occupational standard and has a English and mathematics Level 2 qualification. At Gateway, apprentices must submit: Reflective portfolio and associated mapping document
Undertaking Your End Point Assessment (EPA)	 End Point Assessment (EPA) is the final stage of the actual apprenticeship journey and is where the apprentice will be tested by an independent apprenticeship assessor to determine whether they are able to demonstrate the knowledge, skills, and behaviours within the occupational standard. EPA can only be triggered after 12 months of starting the apprenticeship, and for the L3 Team Leader or Supervisor Apprenticeship it requires the apprentice to have successfully completed all of their on-programme activities, plus have a level 2 qualification in English and mathematics. Assessment method 1: Reflective Portfolio, including a detailed reflection on five (5) work situations carried out in the last three (3) months of their apprenticeship Assessment method 2: Presentation and Interview

Ongoing personal and professional development is an essential skill and/or requirement of every manager and leader.

Your Options after EPA

CMI, as a professional body, is committed to turning accidental managers into conscious leaders and supports its members in their ongoing continued professional development. CMI is the only chartered body that can award Foundation Chartered Manager and its Management Diagnostics provides a valuable self-assessment tool that enables its members to understand what good looks like and know how to develop the skills employers need now and in the future.

Other technical education options following end point assessment include completing another apprenticeship (either in management and leadership or your industry specialism), or considering a specialism higher technical qualification.

END POINT ASSESSMENT

What is an endpoint assessment and why is it needed?

End point assessment is the terminology used by IfATE to describe the period post-Gateway and put simply is what the apprentice needs to do at the end of their apprenticeship programme. Its aim is to test the apprentice's competence in the knowledge, skills and behaviours (KSBs) within the occupational standard <u>L4 Junior</u> <u>Management Consultant</u>

End point assessment usually requires the apprentice to complete a number of different activities, called assessment methods, and is carried out by an End Point Assessment Organisation, such as CMI, who are independent to the Training Provider and Employer.

The end point assessment for the <u>L4 Junior Management Consultant</u> is synoptic, meaning that it has been designed to test all of the knowledge, skills and behaviours within IfATE's occupational standard ST0273 and seeks to discern the breadth and depth of topics/area covered in this standard. It has the following assessment methods:

- Reflective Portfolio, including 5 case studies/work situations (40%)
- Presentation & Interview (60%)

Things to need to know about when creating your portfolio of evidence

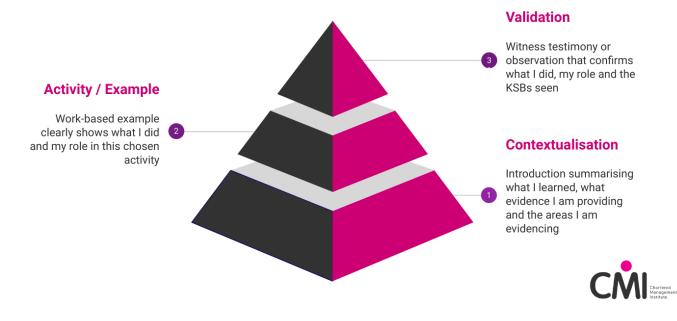
Whilst it is not assessed, the portfolio of evidence is used to underpin the professional discussion assessment. Apprentices are required to complete their portfolio of evidence whilst on-programme which is submitted as part of the Gateway requirements.

Please see below some useful hints and tips on gathering evidence for an end point assessment portfolio



The portfolio of evidence for <u>L4 Junior Management Consultant</u> needs to cover all of the KSBs within the professional discussion assessment method, and should predominantly be real work-based examples that have been validated by a third-party, such as their line manager or using a witness testimony.

The image below explains the importance of triangulating evidence used within a portfolio of evidence:



This is why CMI recommends that as an apprentice you:

- Take a qualitative, as opposed to a quantitative, approach when gathering evidence for your portfolio. Each piece of evidence needs to focus on your role and activities as a manager or leader, and will typically cover multiple KSBs.
- Showcase your 'best' work, including any key achievements whilst on-programme, and/or from within your day to day activities.
- Include a separate evidence locator document within your portfolio that clearly identifies which KSBs each piece of evidence is mapped to. (NOTE: CMI has a template that they share with Training Providers, for apprentices to use as part of their prompting notes within the live assessment activity and to ensure all of the KSBs have been evidenced.)

Things you need to know about assessment method 1 - Reflective Portfolio

Through this method, the apprentice demonstrates competence of the knowledge, skills and behaviours set out in the standard.

The reflective portfolio should contain evidence of the work apprentices have completed and a write up of each piece of evidence, demonstrating how it shows they have met or exceeded the criteria. It is the apprentice's responsibility to ensure that the evidence they present covers the knowledge, skills and behaviours outlined in the standard.

It is expected that the apprentice should reflect in detail on 5 case studies/work situations chosen from within their portfolio. These 5 case studies/work situations ideally should be carried out in the last 3 months of their apprenticeship, and their reflection must demonstrate:

- What they did
- How they did it
- Why they acted as they did
- What they have learned
- What they would do differently next time

The 5 case studies/work situations selected from within their reflective portfolio should cover/focus on the following areas of the apprenticeship standard:

- 1x knowledge
- 1x skills
- 1x behaviours
- 2x covering either knowledge, skills, behaviours or a combination of the three

CMI EPA Apprenticeship Information & Ofqual Qualification Specification | L4 JMCA (ST0273 v1.0) | v1.0 | 09/02/24 The apprentice will need to:

- Reflect on evidence chosen for their portfolio
- Consider how it showcases the relevant knowledge, skills and/or behaviours
- Indicate whether they have met or exceeded the criteria
- Provide at least one piece of evidence for each of the relevant KSBs
- Submit their portfolio at Gateway

Things you need to know about the assessment method 2 - Presentation and interview

Once the apprentice has passed Gateway they are required to complete a presentation and interview. The purpose of the presentation and interview is to:

- Test any gaps identified in the first phase of assessment
- Seek clarification of any questions the independent assessor has from their assessment of the reflective portfolio and presentation
- Confirm and validate judgements on how the apprentice has met the knowledge, skills and behaviours for the standard
- Explore aspects of the apprentice's work, including how it was carried out, in more detail
- Provide a basis for the independent assessor and panel to make a holistic decision about the grade to be awarded

When preparing for their presentation, the apprentice:

- Should focus on the evidence that was used in their portfolio and for the 5 case studies/work situations
- Needs to summarise their experience as a whole and reflect on what they have learned
- Must demonstrate how they have met/exceeded the apprenticeship standard

The interview:

- Is a structured discussion between the apprentice and the panel, using a set of typical competency-based questions that have been developed by CMI, as the Endpoint Assessment Organisation.
- Will consist of 10 questions (3 x Knowledge, 5 x skills and 2 x behaviour). Additional probing questions may be asked by the panel in order to validate their findings and make their overall judgement decision
- Will focus on the outcomes of the reflective portfolio, the presentation and how the apprentice has performed during their apprenticeship

Please note that during the delivery of the presentation and questioning it is recommended that the apprentice has access to their presentation slides and/or speaker notes/aides to act as prompting notes.

The overall grading decision

The Standard is designed to be a synoptic assessment. This means that our Independent Assessors look at every KSB as part of the assessment element, and then synoptically across all of EPA.

The CMI Independent Assessor will use the grading descriptors, listed in annex 1 of the published assessment plan, to support them in their assessment of each of the individual assessment elements.

The Independent Assessor is then required to assign a mark of between 1 and 5 for each learning outcome and/or question asked:

- 1 = The apprentice was not able to evidence or meet the relevant learning outcome at the level expected within the Standard and/or within the requirements of the FAIL grading descriptors
- 2 = The apprentice was only able to partially evidence or meet the learning outcome at the level expected within the Standard and/or within the requirements of the FAIL grading descriptors
- 3 = The apprentice was able to evidence and/or meet the learning outcome at the level expected within the Standard and/or demonstrates the skills/behaviours of the PASS grading descriptors
- 4 = The apprentice's evidence or answer demonstrates breadth or depth. The apprentice is deemed to have partially exceeded the level expected for this learning outcome within the Standard and is

demonstrating a combination of the PASS/DISTINCTION grading descriptors

• 5 = The apprentice's evidence or answer demonstrates both breadth and depth. The apprentice is deemed to have exceeded the level expected for this learning outcome within the Standard and is demonstrates the skills/behaviours of the DISTINCTION grading descriptors

Once the IAA has completed all of the relevant assessment elements they can then use this to select their recommended grade for each of the assessment methods. The apprentices overall grading will then be determined based on the combination of the 2 assessment methods as per the table below:

Assessment Component	Weighting	Assessment Grade	Assessment Grade	Assessment Grade	Assessment Grade
Reflective Portfolio	40%	Pass	Pass	Distinction	Distinction
Presentation & Interview	60%	Pass	Distinction	Pass	Distinction
Overall Grade		Pass	Pass	Pass	Distinction

Note: If the apprentice has not contacted CMI within 10 working days of a REFERRAL outcome, and/or has chosen to not re-sit any referred assessment elements then their overall grade will be reported as FAIL

Please note that:

- All referral results are communicated to the Employer, Apprentice and Training Provider
- Apprentices will be required to resit or retake only the assessment method(s) they have been referred on.
- The timescales for a resit/retake are agreed between the employer and CMI, as the EPAO.
- Any assessment method requiring a resit **must be taken within 3 months of the fail notification**, otherwise the entire EPA must be taken again, unless in the opinion of the EPAO exceptional circumstances apply outside the control of the apprentice or their employer.
- Resits and retakes are capped at an overall grade of PASS, unless CMI as the EPAO determines there are exceptional circumstances requiring the resit or retake.

FURTHER INFORMATION

Information Regarding Resits and Retakes

As mentioned above, where an apprentice has not successfully completed any of the criteria required within an assessment method this will initially be notified as a referral and CMI will send further information to the Training Provider detailing the assessment method that needs to be resat/retaken.

The difference between a resit and a retake is that:

- A resit means that the apprentice did not quite meet the knowledge, skill and/or behaviour advised within the CMI feedback report. This typically means that the apprentice may need to find some additional evidence for their portfolio, and/or adjust their presentation before attending a further live assessment activity.
- A re-take means that there are significant gaps in the knowledge, skills and behaviours and it is recommended that the apprentice undertakes further learning before another assessment is taken.

Apprentices who achieve a pass grade cannot ask to re-sit/re-take their end point assessment simply to achieve a higher grade.

Information Regarding Appeals

There may be occasions when CMI make end-point assessment decisions that apprentices find unclear, unfair or believe have caused disadvantage. If this is the case then they have the right to appeal their endpoint assessment grading decision.

Please note that an appeal:

- Can only be submitted once all methods of assessment have taken place and all marks and grades have been recorded and released correctly for each of the end-point assessment components and the overall grade awarded by CMI.
- Is only able to be submitted if the apprentice feels that they were either treated unfairly by CMI and/or the process has not been followed by CMI, which resulted in them being disadvantaged.
- Cannot be submitted to CMI if the apprentice has concerns about their Training Provider, to gain additional feedback from CMI regarding their overall assessment decision, or if the apprentice feels they did not achieve the result that they expected and want their assessment to be remarked.

For further information regarding submitting an appeal, please see the **CMI EPA Enquiries and Appeal Policy** which can be found on our website <u>here</u>

Information Regarding Reasonable Adjustment Requests

End point assessment should be a fair assessment of an apprentice's knowledge, skills and behaviours, therefore in line with legal and regulatory requirements CMI has the right to make a reasonable adjustment and/or to allow a special consideration in relation to the end-point assessment for all apprenticeship standards that CMI is recognised to provide.

Reasonable adjustments are defined as any action that helps reduce the effect of a disability that places the apprentice at a substantial disadvantage in the assessment situation. They MUST be agreed before the assessment takes place to enable the apprentice to demonstrate their knowledge, skills and behaviours

Special considerations can be applied during the end point assessment period (or post assessment) if there is a reason the apprentice may have been disadvantaged during the assessment period by an event outside of their control. This also includes requests for any extension to end-point assessment deadlines where there are extenuating circumstances (such as apprentice redundancy)

Please note that reasonable adjustments and/or special considerations should not give the apprentice an unfair advantage, and that the apprentice's result must reflect their achievement in the assessment and not necessarily their potential ability.

For further information, please see the CMI EPA Reasonable Adjustments and Special Considerations Policy which can be found on our website <u>here</u>

Information Regarding Recognition of Prior Learning (RPL)

There may be occasions where apprentices are deemed to have Recognition of Prior Learning (RPL). This is usually identified by the Training Provider at the start of the apprenticeship programme, but could also be reviewed during the on-programme stage as a result of the progress reviews. Whilst this is likely to mean that the apprentice doesn't need to complete the relevant module(s) and/or assignment(s) on-programme, they will still need to provide evidence and demonstrate competence in all of the knowledge, skills and behaviours within the L4 Junior Management Consultant _ as part of the end point assessment.

APPENDIX 1 - Glossary of Key Terms

Glossary of Key Words / Phrases Used Within Apprenticeships	Definition and/or Explanation
Assessment Component	The different activities that an apprentice has to complete for each assessment method. Typically these components are assessed holistically to determine one overall grading decision.
Assessment Method	The actual assessment activities that an apprentice needs to complete and pass as part of their endpoint assessment.
Assessment Plan	The document that is published by IfATE (under Crown Copyright) that sets out what needs to be done when testing the competence of an apprentice for that particular standard.
Distinct	Recognisably different in nature from something else of a similar type. This phrase is often used to describe either the type of evidence that has been submitted within a portfolio, and/or the different assessment methods.
End Point Assessment (EPA)	Rigorous robust and independent assessment of an apprentice at the end of training to test that the apprentice can perform in the occupation they have been trained in and can demonstrate the knowledge, skills and behaviours (KSBs) set out in the occupational standard
End-point assessment organisation (EPAO)	An organisation approved to deliver end-point assessment for a particular apprenticeship standard; EPAOs must be on the register of end point assessment organisations
Education and Skills Funding Agency (ESFA)	The Education and Skills Funding Agency is an executive agency of the government of the United Kingdom, sponsored by the Department for Education.
Gateway	The stage of the apprenticeship where it is agreed by the Employer, Training Provider and Apprentice that the Apprentice has the knowledge, skills and behaviours required in the Apprenticeship Standard and can prove this at EPA
Grading Decision	This is the final overall grade for an endpoint assessment. IAAs are required to check the overall grade within the assessment sheet before uploading it to Skilsure ready for Internal Quality Assurance/release of results.
Holistic (or Synoptic) Assessment	Terminology used to identify an assessment method or assessment activity which has a number of components that are assessed as one overall decision.
CMI Independent Assessor (IAA)	Terminology used by CMI. The assessor independent from the on-programme delivery of the Apprenticeship who assesses the competence of the apprentice during the end point assessment activities set out in the published Assessment Plan
Interview	IfATE assessment method - usually requires a number of competency based questions to be asked.
Institute for Apprenticeships and Technical Education (IfATE)	IfATE (sometimes referred to as 'The Institute') works with employers to develop, approve, review and revise apprenticeships and technical qualifications within England.
Knowledge, skills and behaviours (KSBs)	What is needed to competently undertake the duties required for an occupational Standard Knowledge: What the apprentice needs to know and/or understand to complete their apprenticeship successfully. The information, technical detail, and 'know-how' that someone needs to have and understand to successfully carry out the duties. Some knowledge will be occupation-specific, whereas some may be more generic.

	r
	 Skills: What an apprentice needs to be able to do. The practical application of knowledge needed to successfully undertake the duties. They are learnt through training or experience. Behaviours: Apprentices need to demonstrate how they have developed and exhibited the behaviours within the occupational standard within the workplace. Whilst they may be innate or intrinsic they can also be learned so are sometimes considered to be an additional subset of skills.
Live Assessment Activity (LAD)	The point at which the live assessment methods are carried out in front of an Independent Apprenticeship Assessor, such as the presentation and professional discussion.
Occupational (Apprenticeship) Standard	Written and developed by the relevant employer trailblazer group(s) and include the specific Knowledge, Skills and Behaviours (KSBs) needed for specific occupations. The document acts as the basis for apprenticeship standards and T-levels, and aims to put employers in the driving seat for ensuring apprentices are learning skills that are relevant to the workplace.
Occupational Profile	This is an overview of the occupation and describes the sector or industries the occupation is typically found in; the broad purpose of the occupation; and what an employee in the occupation would typically do. The newer standards also include the key duties expected of an apprentice by the time they complete their programme, as well as the occupational profile, expected duration, and grading boundary.
Portfolio of Evidence	Is a collection of pieces of evidence, gathered together on-programme, that is used as the underpinning basis of an end-point assessment method.
On-programme activities	Activities carried out during the time of the apprenticeship supported by the training provider and employer through training and resources
Presentation	IfATE assessment method - presented as part of the live assessment. Typically the presentation is on a set topic or based on a project/activity.
Professional Discussion	IfATE assessment method - a two-way discussion between the independent assessor and the apprentice to assess the apprentice's in-depth understanding of their work. It differs from an interview and/or Q&A session as they tend to require the assessor asking questions and the apprentice answering them so there is less scope for interaction and discussion. Apprentices are expected to actively listen and participate in the formal conversation, and use this assessment method as an opportunity to confirm their competency across the relevant KSBs.
Question & Answer Session	IfATE assessment method - typically used following a presentation to confirm the assessors understanding of certain KSBs and/or to stretch to a distinction.
Referral/Referred	CMI terminology used to indicate that an apprentice has not met all of the KSBs within an assessment method. CMI will need to advise if the referral requires a resit or retake.
Resit	IfATE terminology used to indicate that an apprentice did not meet all of the KSBs for a particular assessment method or KSB group. Typically a resit will not require the apprentice to undertake further learning so can be completed within a few weeks of the referral notification.
Result	Final grading decision after it has been through our internal quality assurance process. This result is advised to the TP and Apprentice plus sent to ESFA/Ofqual as part of our reporting requirements.
Retake	IfATE terminology used to indicate that an apprentice did not meet a number of the KSBs within an assessment method. Typically a retake requires the apprentice to undertake further learning before undertaking their endpoint assessment again.

APPENDIX 2 - What KSBs are assessed within each assessment method?

JUNIOR MANAGEMENT CONSULTANT APPRENTICESHIP STANDARD

Area of the Standard	Knowledge - what an apprentice is expected to know:
Business environment	Know the different industry sectors, the types of organisations within these sectors, and how a management consultancy can support their needs
Management consultancy business	Know how a consultancy typically works, how it manages relationships with its clients, and understand the ethical considerations it operates under
Business finances	Know key financial ratios and performance indicators (such as balance sheets and cash ow forecasts) that are necessary to effectively assess an organisation's financial health
Project management	Know how a project moves through its lifecycle of planning, design, development, testing, deployment and evaluation. Know what risks and issues are and how to report and monitor them to project and client teams
Area of the Standard	Skills - what an apprentice is expected to be able to do:
Communication skills	Speak and write clearly, influence others, actively listen, question effectively and structure conversations. Support or run meetings and clearly present a point of view to audiences. Communicate appropriately through a variety of channels and platforms
Team working skills	Work effectively within a group environment made up of different personality types. Be aware of one's own and other people's emotions and use this understanding to guide decisions
Business analysis	Use a range of tools and methodologies to help analyse an organisation (such as SWOT analysis). Undertake qualitative and quantitative research
Relationship building	Build rapport and trust, maintain relationships once they are built and be able to repair them when they are damaged
Personal management	Manage time effectively and prioritise workloads. Take time to reflect on project successes and learn from failure. Maintain good health and energy through a work / life balance
Project management	Plan, organise and manage resources in order to achieve set goals. Help create objectives at the start of a project, support the development and implementation of project plans and help monitor progress. Proactively identify risks and issues and help create action plans to address these.
IT technical capabilities	Be able to assist in the creation of reports, word processed documents,

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	spreadsheets, slide decks for presentation and software for project management. These are the most prominent, though there are others depending on the consultancy
Report writing	Help produce reports that clearly present recommendations for change using a range of qualitative information and numerical data
Area of the Standard	Behaviours- what an apprentice is able to demonstrate:
Professionalism	Reflect the expected behaviours of the organisation, project and client teams. Be tactful and discreet with sensitive information and protect
Self-development	Frequently seek and act upon feedback, reflect on performance and have a desire for learning
Adaptability	Be flexible to the needs of the project (working times and locations). Be open minded and able to work with a range of different people
Adherence to legal and ethical frameworks	Work within legal and ethical frameworks to protect all stakeholders, including the client, from reputational damage

APPENDIX 3 - CMI Command Verbs

Below is a list of the CMI command verbs that apprentices may find useful and/or want to use to ensure they are fully meeting the relevant assessment criteria of the L4 Junior Management Consultant(JMCA) occupational standard.

Command Verb	Definition
Analyse	Break the subject or complex situation(s) into separate parts and examine each part in detail; identify the main issues and show how the main ideas are related to practice and why they are important. Reference to current research or theory may support the analysis.
Assess	Provide a reasoned judgement or rationale of the standard, quality, value or importance of something, informed by relevant facts/rationale.
Consider	Take (something) into account (i.e. different ideas, perspectives, theories, evidence) when making a judgement
Create	Originate or produce a solution to a problem.
Define	Show or state clearly and accurately.
Develop	Elaborate, expand or progress an idea from a starting point, building upon given information.
Evaluate	Consider the strengths and weaknesses, arguments for and against and/or similarities and differences. The writer should then judge the evidence from the different perspectives and make a valid conclusion or reasoned judgement. Apply current research or theories to support the evaluation when applicable.
Examine	Inspect (something) thoroughly in order to determine its nature or condition.
Explain	Make something clear to someone by describing or revealing relevant information in more detail.
Explore	Go through the topic/issue thoroughly looking at all areas that affect the topic/issue.
Formulate	To devise or develop an idea or concept in a concise and systematic way.
Identify	Ascertain the origin, nature or definitive characteristics of something.
Outline	A general description/broad account/summary of something showing essential features/outline the case briefly but not the detail.
Recommend	Put forward proposals, an alternative or suggestion(s) supported by a clear rationale appropriate to the situation/context.
Reflect	Consciously contemplate, appraise or give balanced consideration to an action or issue.
Review	To examine, survey, reconsider a subject, theory or item.
Specify	Identify or state a fact or requirement clearly and precisely in detail.
Use	The action of using something for a particular purpose.

APPENDIX 4 - Version History

Version	Reason for change	Date amended
1.0	Document created	09.02.24