

GUIDANCE FOR PROVIDERS

Chartered Manager Degree Apprenticeship

July 2018



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The Chartered Manager Degree Apprenticeship (CMDA) is a Trailblazer Apprenticeship that has been developed by a group of employers led by Serco, in liaison with the Chartered Management Institute (CMI) and a number of Providers consisting of Higher Education Institutions (HEIs).

The CMDA includes work-based learning, business education leading to a relevant degree, and professional recognition through the award of Chartered Manager status.

This document incorporates the published CMDA Standard and the published Assessment Plan as approved by the Department of Business, Innovation and Skills (BIS) (September 2015). It is intended to ensure that providers have the information needed in order to prepare apprentices for the CMDA end-point assessment.

Information about the incorporation and assessment of apprentices for Chartered Manager status - the ultimate management accolade - is also included. Note that this document is not intended to be a definitive source of information about apprenticeships - such information should be obtained from the [.gov website](#).

1: GENERAL INFORMATION

This section includes general information about apprenticeships and this particular apprenticeship, what's included and how providers can get involved in the delivery.

1.1 ABOUT THE CHARTERED MANAGEMENT INSTITUTE

CMI is the only chartered professional body in the UK that is dedicated to promoting the highest standards in management and leadership excellence. Over 100,000 managers use its services on a daily basis. It was over 60 years ago that, as the British Institute of Management back then, the organisation developed the UK's very first diploma in management studies. In the years that followed CMI has constantly been at the forefront of all aspects of management training and thinking.

CMI's practical qualifications are ideal for managers and leaders at any level, and CMI remain the only awarding¹ and independent body recognised by the Privy Council to award Chartered Manager status (CMgr MCMi).

In addition to assessing and awarding Chartered Manager, CMI is also listed on the Education and Skills Funding Agency's Register of Apprentice Assessment Organisations. This means that CMI is able to assess the CMDA using the end-point assessment method described in the Assessment Plan. This gives Providers a one-stop shop for assessment of Chartered Manager status, and the end-point assessment, both of which are required in order for the apprentice to achieve the CMDA.

CMI provides an integrated package of support to maximise the apprentice's learning and achievement. This consists of CMI membership benefits to underpin professional recognition and development, an option of dual accreditation to provide apprentices' with an additional CMI qualification, and comprehensive end-point assessment – the final validation that the apprentice meets the Standard and can be awarded the apprenticeship.

1.2 ABOUT APPRENTICESHIPS

An apprenticeship is first and foremost a job with substantial training and the development of transferable skills. It is a way for people of all ages to earn while they learn, gaining a qualification and a real future.

Apprentices must be in paid employment for the duration of their apprenticeship, and will combine working with studying for a qualification. Higher apprenticeships and the new degree apprenticeships are part of the apprenticeships family. Higher apprenticeships refer to all apprenticeships which includes the achievement of academic and vocational qualifications and learning from level 4 up to bachelor's and master's degrees at levels 6 and 7 respectively.

Degree apprenticeships are the latest model to be developed as part of higher apprenticeship standards, seeing apprentices achieving a full bachelor's or master's degree as a core component of the apprenticeship. Degree apprenticeships combine both higher and vocational education and fully test both the wider occupational competence and academic learning, either using a fully-integrated degree

¹ Regulated by Ofqual in England and Northern Ireland, Scottish Qualifications Authority Accreditation in Scotland, and Qualifications Wales in Wales.

co-designed by employers and Providers, or using a degree plus separate end-test of professional competence.

The new degree apprenticeship model has a number of benefits for employers, prospective apprentices, and Providers:

- Employers can attract new talent, particularly high-calibre school-leavers who are keen to earn a full bachelor's or master's degree in a work-based environment. It will allow them to acquire the graduate level skills they need;
- The apprentice, will be employed and paid a wage throughout, will gain a full degree, and gain a head-start into their chosen profession compared with many of their counterparts;
- Providers can strengthen links with local employers and offer more degree programmes that meet employer needs and are accredited by professional bodies, while also having a new product to offer to prospective applicants.

1.3

ABOUT THE CHARTERED MANAGER DEGREE APPRENTICESHIP

The Chartered Manager Degree Apprenticeship (CMDA) is a Trailblazer Apprenticeship that has been developed by a group of employers led by Serco, in liaison a number of Higher Education Institutions (Providers) and the Chartered Management Institute (CMI) as the only body that can award Chartered Manager status.

The CMDA is a higher level degree apprenticeship that is pitched at Level 6 and includes business education, work-based learning and professional development through to Chartered Manager status. It is based upon the published CMDA Standard and Assessment Plan as developed by employers, who will ensure that these remain relevant and current. The Standard is shown at Appendix 1.

Apprentices that complete the CMDA will stand out from students following a standard degree route by achieving not only a degree but also gaining work-based management experience and achieving Chartered Manager Status¹.

1.4

WHAT'S INCLUDED IN THIS APPRENTICESHIP

RELEVANT DEGREE

As part of the CMDA, apprentices will study for a relevant degree. This can relate to management and business (either BA (Hons); BSc (Hons) or BBA (Hons)).

The degrees are developed (or may already be in existence) by Providers, who must ensure that any degree that is delivered as part of the CMDA maps 100% to the published CMDA Standard.

Degrees may be 'Dual Accredited' by CMI – this is an optional process whereby the content of the degree is further aligned and mapped to a CMI qualification. This enables the apprentice to gain an additional qualification as part of their academic studies.

WORK BASED LEARNING

Apprentices must be employed in order to undertake the CMDA. Work-based learning allows apprentices to 'learn while they earn'. Job roles must allow sufficient opportunities for apprentices to undertake activities and tasks and implement learning acquired through their studies for the degree. They must have access to real work which is productive and gives apprentices opportunities to develop, practice, and evidence knowledge and skills to meet the Standard. Off-the job training and assessment will take place as part of their paid working hours.

CHARTERED MANAGER

The Standard has been mapped to the requirements for Chartered Manager. This means that Apprentices are able, through their degree and work-based learning activities, to acquire the knowledge and skills that a Chartered Manager should have. During the CMI End-point Assessment, the Independent Assessor will assess the Apprentices' evidence to determine if they have acquired the skills and knowledge to become a

¹ In order to achieve Chartered Management Status at EPA stage, the Apprentice must have been a manager for a minimum of 3 years.

Chartered Manager¹. On completion of the Standard, including successful end-point assessment for the CMDA, the Apprentice will become a member of the Chartered Management Institute (MCMI) and will be granted the CMgr designation which will remain valid as long as they continue their professional registration and maintain CPD.

Chartered Manager (CMgr) is the highest status that can be achieved in the managerial profession. Awarded only by CMI, it is recognised throughout the public and private sectors, across all managerial disciplines. Chartered Manager proves that they have the knowledge to deliver results. Most managers agree it offers benefits well beyond typical management qualifications, and list it as one of the three most effective ways to develop their abilities.

Chartered Managers:

- Add value – deliver added value to their organisations
- Get results – using their managerial skills to lead people and manage change.
- Innovate – create new product, service or market developments.
- Exceed targets – meet or beat performance targets
- Deliver improvements – initiate significant savings or performance improvements with new ways of working
- Work more confidently – become more confident in applying skills and increasing self-awareness.

*Chartered Managers deliver **£391,443** in added value to their organisation. 68% of CMgrs make significant savings or performance improvements;

- 65% have innovated to create new products or services;
- 67% consistently beat targets.

Managers report greater self-awareness (93%) and confidence in applying their skills (86%) as a result of becoming Chartered.

**Findings taken from 'Professionalising Management: the impact of the Chartered Manager'*

1.5 WHO THIS APPRENTICESHIP IS AIMED AT

The CMDA is suitable for those who are, or wish to become, professional managers, i.e. people that take lead responsibility for projects, people, operations and/ or services to deliver long term organisational success. It is applicable to professional managers from all sectors - the private, public or third sector - and all sizes of organisation.

The CMDA has been designed for as wide a range of individuals as possible. This includes individuals who are at the start of their career – including school leavers – that wish to become professional managers and achieve Chartered Manager status, as well as those aspiring or existing managers who may already have developed practical experience but who wish to develop their theoretical understanding of management skills further.

1.6 ENTRY REQUIREMENTS

Individual employers will set the selection criteria for their apprentices though most will be expected to hold 'A' levels (or equivalent) or existing relevant Level 3 qualifications. Other relevant or prior experience may

also be considered as an alternative. Providers must liaise with employers to determine their requirements, in line with any specific requirements of the Provider.

Potential apprentices should also have achieved qualifications in English and mathematics and at a minimum of level 2 or equivalent, and also demonstrate Information Communication Technology (ICT) skills at this level. Evidence of this must be collated by the Provider. Where this is not the case, apprentices must complete these by the end of the CMDA, and evidence provided to the end-point assessment body (copies of certificates will suffice).

¹ In order to achieve Chartered Management Status at EPA stage, the Apprentice must have been a manager for a minimum of 3 years.

1.7 DURATION

It will typically take four years to complete the CMDA, although the exact duration will be dependent on the previous experience of the individual. Experienced managers for example may be able to complete in around two years, particularly where they have access to evidence that demonstrates their achievements as a professional manager. School leavers and those with no or very little management experience will require longer.

Note that apprenticeships are designed to allow candidates to achieve new skills. Where a candidate holds existing skills the programme must be adapted to accommodate these, and funding should not be claimed for learning covering already existing skills.

Providers should liaise with employers and potential apprentices to establish the duration of the programme required.

1.8 HOW PROVIDERS CAN GET INVOLVED

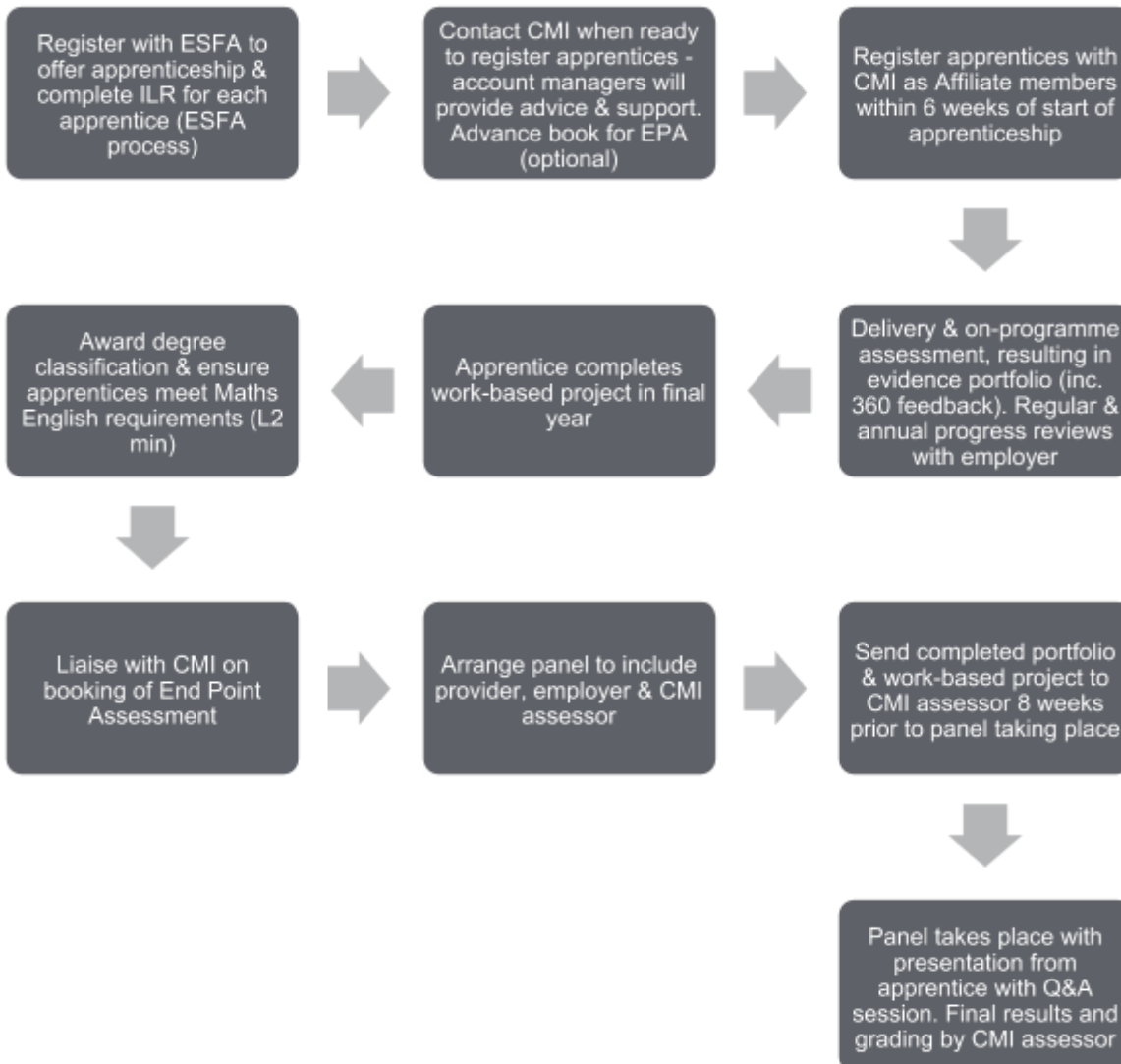
The CMDA can be delivered through organisations with degree awarding powers that are listed on the Education and Skills Funding Agency (ESFA) Register of Apprentice Training Providers (RoATP) and whose Degree(s) map to the published CMDA Standard.

To deliver the CMDA a Provider must either be:

- Listed on RoATP and already receive funding for apprenticeship delivery from the ESFA;
- A subcontractor to another Provider listed on the ESFA's Register of Apprentice Training Provider who is in receipt of funding for apprenticeships from the ESFA;
- Successful applicants to an ESFA Provider Expression of Interest for higher and degree apprenticeship delivery;
- On the Register of Apprenticeship Training Providers (for delivery from 1 April 2017).

Providers may wish to deliver the whole apprenticeship directly or, act as the lead apprenticeship provider, sharing the delivery by subcontracting with other providers.

PROVIDER PROCESS



1.9 MEMBERSHIP

REGISTRATION & SUPPORT PACKAGE

As part of the professional body alignment required within the standard, apprentices are required to become CMI members from start of the CMDA. Registration for professional membership must be undertaken by the apprenticeship provider (i.e. the HEI) within 6 weeks of the apprenticeship commencing. CMI membership supports both the academic and professional development of apprentices through a range of interventions.

Registration will result in the CMDA apprentices receiving a welcome email from CMI and access to the following:

- Specifically tailored Affiliate Member status with CMI membership benefits for the duration of the apprenticeship, and a complimentary year afterwards to support post-apprenticeship development;

- Access to a CMDA-tailored version of CMI's online content portal ManagementDirect supporting learning and embedding the Chartered Manager application submission;
- Benefits, services and communications underpin individuals developing professional awareness and capability and help them to identify learning needs, take ownership of their own learning and development, and develop habits of CPD essential to achieving Chartered Manager status;
- Apprentices are part of a membership community of over 120,000 managers with the opportunity to network through, for example, events, mentoring schemes and social media.

When you are ready to register your first CMDA apprentices please contact your account manager who will arrange for the team at CMI to do this for you for your first group. They will also set up access to CMI's Hub in order that you can conveniently upload further batches of apprentices in the future and complete the registration process smoothly. Training in how to use the CMI Hub can be provided and full guidance documentation and videos are also available.

KEY BENEFITS OF MEMBERSHIP

Affiliate membership for apprentices gives them access to:

- ManagementDirect – CMI's on-line management and leadership resource portal which has been tailored to be specific to the CMDA
- Dedicated on-line mentoring system to provide advice and support from mentors drawn from CMI's member community, for both work based and degree experience
- Local events and networks organised by CMI Regional Boards and national networks such as CMI Women.

1.10 SUPPORT FOR APPRENTICES

MANAGEMENTDIRECT

Once registered with CMI (which all CMDA apprentices are required to be within 6 weeks of starting the CMDA) apprentices will, as Affiliate Members, be given access to ManagementDirect – CMI's online resource tool that is packed with content to support apprentices, including:

- **E-Learning Modules**

From developing a management style to the principles of project management.

- **Leader Videos**

Experts talk about overcoming real-life management issues.

- **Thinkers**

Summaries of the ideas of major theorists to help problem solving.

- **Interactive Scenarios**

What decisions would you make on these management challenges?

- **Published Articles**

A database of articles from Professional Manager.

- **Checklists**

Hundreds of practical tick lists of activities to ensure a best practice approach

- **E-Journals**

Journals, publications and research documents offering latest industry insight

- **Templates**

Document outlines and research summaries on key business initiatives such as devising a marketing plan

ManagementDirect will provide valuable support to apprentices in the workplace and as part of their academic studies and progression towards Chartered Manager. Upon registration as an Affiliate Member apprentices will receive a welcome email that will include a link to ManagementDirect so they can begin to access this valuable resource as soon as possible. The portal can be [accessed here](#).

APPRENTICESHIP SUPPORT PROGRAMME (ASPA) AND SKILLS FUNDING AGENCY (ESFA)

ESFA produces a number of documents that aim to support employers and providers. The Apprenticeship Staff Support Programme has produced resources to support providers in understanding and implementing the apprenticeship reforms. The resources include a 'Resources for Planning and Action' document, which includes a section on planning for the delivery of apprenticeship standards, also four free podcasts:

- An overview of the reforms;
- Learning from providers;
- Understanding the changes to assessment;
- The changing employer-provider conversation.

resources can be found [here](#).

1.1
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FUNDING

This information is constantly changing and evolving. Please see the Frequently Asked Questions on CMI's website where we endeavour to keep information as current as possible. Please click on:

<http://www.managers.org.uk/management-apprenticeships/more/faqs>

2: ASSESSMENT

This section provides information about how the apprentice is to be assessed, including the formative on-programme assessment through to the summative end-point assessment.

2.1 SUMMARY OF ASSESSMENT

There are a number of elements that make up assessment for the apprenticeship including formative, on-programme assessment and a summative end-point assessment.

ON-PROGRAMME ASSESSMENT

1. A range of modules within a Management Degree to develop knowledge, skills and behaviours progressively against the Standard (to the value of 360 credits);
2. Learning and ongoing assessment within the Individual Learning Plan;
3. Portfolio compiled to provide evidence of the application of learning and the application of management concepts;
4. Work Based Project undertaken towards end of programme - a substantive piece of work requiring research, design and implementation.

GATEWAY TO END-POINT ASSESSMENT

The apprentice will need to have achieved the following:

1. Confirmation that final project completes degree requirements and degree therefore achieved;
2. Evidence that the apprentice has achieved English, maths at level 2 or higher.

END-POINT ASSESSMENT

Final synoptic assessment

Apprentice grading based upon:

1. Review of portfolio - marked against criteria to evidence various competences being practices, etc;
2. Review of Project - marked against criteria to evidence various competences being practices, etc;
3. 15-minute presentation on Work Based Project;
4. Panel interview to clarify and assess behavioural and skills competences in more depth, including exploring evidence for Chartered Manager status;
5. Inform final grading.

There are a number of elements that make up assessment for the CMDA including formative, on-programme assessment, a work-based project and a summative end-point assessment. The end-point assessment also includes a review of the work-based project and the evidence produced as part of the on-programme assessment.

During the delivery and assessment of the CMDA there should be regular reviews (at least quarterly) between the employer and the Provider with a formal annual review of the apprentice's progress.

Formative on-programme assessment must take place in liaison with the employer. The methods of assessment used as part of this are generally not prescribed and should be agreed between the Provider and employer to ensure that the apprentice is assessed across the totality of the Standard.

PORTFOLIO OF ASSESSMENT EVIDENCE

Methods used to assess the apprentice must be valid and reliable, and allow for the generation of evidence which is sufficient to make judgments about the apprentice's level of knowledge and understanding, skills and competencies.

The assessments will result in a portfolio of evidence that must contain evidence of the knowledge and understanding, skills and behaviours that the apprentice has acquired and the application of these. It will demonstrate their very best work, evidencing the apprentices' achievements and capabilities and where they may have exceeded the requirements of the role. The portfolio should enable the apprentice to demonstrate how they have applied their knowledge and understanding, skills and behaviours in a real work environment to achieve real work objectives. The portfolio must demonstrate evidence against the Standard, and will support the attainment of Chartered Manager status.

Evidence may be in the form of assignments, reports, practical exercises, projects, minutes, appraisals against performance objectives, development plans, records of observation of performance and professional discussions, personal reflective log, and feedback on behaviours via contact with others, team work - manager's report, emails, customer comments, peer review etc. Providers must assist the apprentice to develop their portfolio to ensure that it is complete and that it covers the totality of the Standard.

The portfolio will contribute towards the achievement of the degree, the assessment for Chartered Manager and will also be reviewed as part of the end-point assessment for the CMDA. Successful completion of the degree is required to progress to the end-point assessment. This is confirmed during the Gateway Process to the end-point assessment described in 2.4.

360 DEGREE FEEDBACK

During the final year, 360 degree feedback on the apprentice's performance should be obtained from managers and peers. This exercise should be conducted sensitively and input should be anonymous to the apprentice where possible. The outcome of this exercise must be discussed with the apprentice to allow opportunities for further development based upon this feedback. This may be in the form of an action plan or included in a self-development log. Evidence of this process must be included in the portfolio of evidence.

The work-based project is a substantial piece of work to be undertaken towards the end of the CMDA during the final year. The project must bring together elements of learning from different parts of the programme and show evidence of accumulated knowledge and understanding of management, and the application of these within their organisation. The project must meet the Standard and demonstrate the approach taken to the planning and completion of the project.

Because of the significance of the project, the employer and Provider must work together with the apprentice to agree a project that is achievable within the employer's business constraints whilst meeting the needs of the Standard. The project should be conducted as part of the apprentice's normal work. The employer should make allowances, in terms of time and resource, for the project to be undertaken. Any elements which need to be undertaken outside of normal work should be agreed between the employer, apprentice and Provider so that apprentices are not disadvantaged in any way from performing their job and meeting the requirements of the project.

DESIGN

- A specification must be developed to show what has to be delivered on completion of the project - this must include the outputs, project plans etc;
- Terms of reference must be developed by the apprentice and agreed by the Provider and employer early in the project;
- The Provider must provide clear project assessment criteria including those for the terms of reference, approach to the problem, solution design and implementation, the final report and presentation;
- Apprentices must document their assumptions and highlight the consequences of these assumptions – enabling them to demonstrate their understanding of commercial pressures and the application of their thinking and problem solving skills;
- Agreement must be made between the apprentice, employer and Provider on what systems, tools and platforms will be required (if any) to complete the tasks and how these will be made available.

DELIVERY

- Providers must work with the employer and apprentice to agree the project title and support arrangements required to enable the project to be undertaken;
- The project should normally be based on an agreed business problem that forms part of the apprentice's role;
- Suitable time should be set aside by the employer for the apprentice to plan, undertake and write up their project;
- The apprentice must first work out what is required and present terms of reference and an initial plan for agreement with the employer and Provider;
- The project should typically be undertaken at the employers premises;
- The employer and Provider must ensure that the apprentice has access to the tools and systems required to complete the tasks within the project;
- The apprentice must provide a signed statement to confirm the project is their own work.
- The project will be set and completed during the final year of the apprenticeship.

PROJECT ENVIRONMENT

- A suitable project environment should be provided ensuring access to all required tools and systems. This may be the apprentices' normal place of work/ work station, or another environment suitable for the project;

- Someone responsible for managing the project from the employer perspective must be identified;
- A tutor from the Provider must oversee and provide support to the apprentice.

Along with the portfolio, the work-based project will contribute towards the achievement of the degree, the assessment for Chartered Manager and will also be reviewed as part of the end-point assessment for the CMDA. Successful completion of the degree is required for the apprentice to progress to the end-point assessment. This is confirmed during the next stage which is the Gateway Process to end-point assessment.

2.5 GATEWAY TO END POINT ASSESSMENT

The Gateway process must be used to confirm to the end-point assessment body that the apprentice has met the pre-requisite requirements of the Standard before they move to the end-point assessment. The form at Appendix 4 must be used to confirm to CMI that the apprentice has completed the pre-requisites which are successful achievement of the degree. Maths and English qualifications at level 2 are also a prerequisite for achievement of the CMDA.

DEGREE

The provider will need to confirm to CMI that:

- The degree has been completed;
- The work-based project meets the final requirements of the degree;
- The degree can be awarded.

Apprentices will be graded by the provider for the degree using Honours degree classifications for English universities.

2.6 END POINT ASSESSMENT

It is the employer's responsibility to choose the end-point assessment organisation, though it is likely that in reality this will happen in liaison with the Provider. This section describes the end-point assessment for the CMDA where CMI is the chosen body for the end-point assessment.

Note that any other organisations that deliver the end-point assessment for the CMDA cannot assess apprentices for Chartered Manager status; only CMI is able to do this as approved by Privy Council. Where CMI is the chosen end-point assessment organisation, the assessment for Chartered Manager and the end-point assessment will run concurrently.

All of CMI's assessors are fully trained, standardised to ensure consistent assessment decisions and must adhere to a strict code of conduct.

END POINT ASSESSMENT ORGANISATIONS

Any organisation that wishes to deliver the end-point assessment for the CMDA must do so in accordance with the published Assessment Plan, and be approved by the Education and Skills Funding Agency (ESFA). All approved organisations for the CMDA are shown on the List of Assessment Organisations for Apprenticeships on the ESFA's website.

CMI has the assessment expertise and necessary resources to undertake the end-point assessment having a large number of trained independent assessors that are regionally spread and available for conducting independent assessments. Standard setting takes place on a regular basis to ensure that CMI's independent assessors are consistent in their assessment decisions.

ARRANGING THE END POINT ASSESSMENT

The end-point assessment takes place via a panel meeting. The Provider will be responsible for coordinating the panel meeting to include the Provider, employer, and an independent assessor from the independent assessment organisation. Panel meetings should be arranged as and when they are required and must take place at suitable, accessible locations with appropriate resources to allow for presentations and panel interviews to take place.

When the panel is due to be arranged Providers must contact CMI as the chosen end-point assessment organisation at least 3 months before the anticipated panel date. CMI will then allocate an independent assessor. This timescale also allows for review by the independent assessor of the completed portfolio and work-based project in advance of the panel taking place.

Although the end-point assessment panel meetings can be arranged early on, they can't actually take place until the requirements of the Gateway Process described above have been met. Providers must give CMI at least 3 months-notice to allow for the allocation of an independent assessor. Panel meetings will take place at the end of the apprentice's final year when they have achieved the degree and met the requirements for ICT r mathematics and English at level 2 or above.

Providers should allow two hours per apprentice to allow for the apprentices' presentation and interview, panel discussion and grading.

CONDUCTING THE END POINT ASSESSMENT

Review of assessment evidence

The end-point assessment can take place when the requirements of the Gateway Process have been met. The end-point assessment is an overall synoptic assessment that covers the whole Standard. The end-point assessment will be undertaken by a panel comprising:

- A representative from the employer;
- A representative from the Provider;
- An independent assessor appointed by CMI (Chair).

Each apprentice's portfolio of evidence and work-based project will be reviewed by the independent assessor in advance of the panel against specific criteria which will be applied on a sampling basis, and will cover a range of assessment methods used to gain evidence for the portfolio. This is to check that the Standard has been sufficiently covered.

A review of the work-based project will also take place by the independent assessor. Any particular aspects of the work that they wish to discuss with the apprentice during the panel interview will be noted, either to confirm their judgement and/or provide further information on which to base grading decisions.

It is expected that both the HEI and the employer will already be familiar with the apprentice's work-based project and the content of the portfolio.

Presentation

The apprentice is required to deliver a short presentation (approximately 15 minutes) to the panel about their project. The presentation must focus on the outcomes of the project and describe the objectives and outputs of their project, and will demonstrate:

- What the apprentice set out to achieve;
- What they have produced in the project;
- How they approached the work and dealt with any issues;
- Confirm the demonstration of appropriate interpersonal and behavioural skills.

The primary focus of the presentation must be on the work undertaken during the project, however during the interview session the panel will explore the apprentices' broader experiences to demonstrate that the knowledge and skills defined in the Standard have been met.

Practical requirements for the presentation:

- The presentation must take place following the completion for the project and the preparation of the final report;
- The apprentice will receive appropriate notice of their presentation time (a minimum of 7 days' notice of the date);
- A structured brief will be used to support the presentation to ensure a consistent approach;
- The presentation and interview session will normally be approximately one hour duration;
- The presentation should be conducted face to face, or via live media;
- The presentation must be conducted in a suitable location – organised by the Providers;
- The apprentice must be put at ease to enable them to do their best;
- The presentation will be to the Provider and independent assessor, and the employer whenever possible.

Interview and professional discussion

Following the presentation an interview will take place by the panel, the purpose of which to:

- Clarify any questions the panel/ independent assessor has from their assessment of the work-based project and portfolio;
- Confirm and validate judgements about the quality of work;
- Explore aspects of the work, including how it was carried out, in more detail;
- Provide a basis for the independent assessor to make a holistic decision about the grade to be awarded.

The apprentice will provide responses to a series of competency based questions put to them by the panel members. The questions will require the apprentice to draw on their experiences throughout their apprenticeship but will also focus on the findings/ recommendations made within their work-based project activity.

The interview will be conducted face-to-face or via video or teleconference.

This combination will fully test that the apprentice has demonstrated the full range of skills, knowledge and behaviours detailed in the Standard.

The independent assessor will act as Chair and will have the final decision as to the outcome of the panel, the award of the apprenticeship and grading.

Preparing apprentices for the End Point Assessment

Providers should ensure that apprentices have had support and practice in preparing and delivering presentations, and developing interview skills. Powerpoint presentation is preferred but other methods may be used as appropriate, and the needs of apprentices that require reasonable adjustments should be met.

2.7

FINAL ASSESSMENT AND GRADING

The independent assessor will review the evidence for each apprentice and grade the apprentice on the following scale: fail/pass/merit/distinction. Full detail of the grading protocol is set out in the Assessment Plan.

This section outlines how apprentices may appeal against decisions regarding the outcome of the end-point assessment. Note that an appeal against the degree should go through the Provider's own appeals process. For appeals against decisions about Chartered Manager please see the next section.

Appeals against the outcome of the end-point assessment should be addressed to CMI as the independent assessment organisation. These should clearly state the grounds for appeal and be made within 20 working days of the receipt of the results.

Appeals may be made by post to the Chartered Management Institute, Management House, Cottingham Road, Corby, Northamptonshire NN17 1TT, or via email to apprenticeship@managers.org.uk.

CMI will confirm, in writing, acknowledgement of receipt of the appeal within 10 working days.

CMI will arrange for the Lead independent assessor to review the documentation relating to the results. This will include the portfolio, work-based project, copy of the presentation and the panel's notes from the panel interview. The Lead independent assessor will not be informed of the decision of the first assessor, and may conduct a telephone interview with the appellant as part of this process. The decision of the Lead independent assessor is final.

In the event that an apprentice fails to pass the independent assessment, an appeal against the decision may be made. The process is as follows:

- Any appeal must be made in writing within 28 days of the fail decision being confirmed, and stating the grounds for appeal
- Appellants must send in a cheque for £150 along with the written appeal (cheque is held pending the appeal outcome)
- CMI then organise a review of the case through the Lead independent assessor, or if the appeal is against this person through another independent assessor
- All of the apprentice's assessment documentation will be reviewed and a telephone interview will take place
- If the appeal is successful, then the cheque is destroyed, the decision is reversed and apprentice awarded CMgr
- If the appeal is unsuccessful then the cheque is cashed and the fail decision remains in place
- All appeals must be sent to apprenticeships@managers.org.uk.

If the appeal identifies any shortcoming or failure in the assessment process, CMI will take steps to:

- Identify any other apprentice who has been affected by the failure,
- Correct or, where it cannot be corrected, mitigate as far as possible the effect of the failure, and
- Ensure that the failure does not recur in the future.

Evidence of the following is required in order to claim the apprenticeship certificate:

- Degree certificate;
- Mathematics qualification at Level 2 or above;
- English qualification at Level 2 or above;

Following the end-point assessment, the independent assessor will grade the assessment and provide the results to the CMI. The CMI will apply to the ESFA for the Apprentice Certificate.

3: ROLES & RESPONSIBILITIES

3.1 PROVIDER'S ROLE

Each provider must:

- Develop its own degree programme and map this to the outcomes in the Standard to ensure that these are fully met (existing degrees may already map to the Standard);
- Develop approaches that will deliver high quality education and training to apprentices and fulfil employer expectations. This may be achieved via a range of different delivery models including day release, block release, distance learning and online, or through a more integrated approach designed in association with the apprentice's employer;
- Assess and provide feedback to the apprentice;
- Take part in periodic reviews (to be agreed with the employer) and a formal annual review with the employer to review the apprentice's progress;
- Ensure internal quality assurance of their own formative assessment that takes place as part of the CMDA;
- Liaise with employers to ensure that apprentice development plans are in place and executed, giving apprentices opportunities to access develop, practice, and evidence knowledge and skills to meet the Standard;
- Liaise with CMI and the employer regarding the end-point assessment².

3.2 EMPLOYER'S ROLE

Each employer must:

- Identify apprentices that may be suitable for the CMDA;
- Ensure the apprentice is undertaking real work which is productive and gives apprentices opportunities to access develop, practice, and evidence knowledge and skills to meet the Standard;
- Allow the apprentice to attend external off-the-job training and assessment as part of their paid working hours;
- Take part in quarterly reviews and a formal annual review with the Provider to review the apprentice's progress;
- Liaise with the Provider regarding the end-point assessment and ensure employer participation in the panel;
- All apprenticeships will last for a minimum of 12 months and employers will be expected to employ an apprentice for the full duration of their apprenticeship. Apprenticeships may take between 1 to 6 years to complete;
- In most cases employers will be expected to employ an apprentice for at least 30 hours per week.

² Note that there may be other bodies recognised to deliver the end-point assessment

A useful guide for employers is [available here](#).

3.3 CMI'S ROLE

CMI as the end-point assessment organisation must:

- Appoint qualified and experienced independent assessors including Chartered Manager Status;
- Develop assessment materials for use during the end-point assessment;
- Ensure that the independent assessors are standardised and provided with clear guidance so that assessment decisions across all assessors are consistent;
- Liaise with the Provider with regards to the end-point assessment;
- Attend panels and take decisions regarding grading of the apprenticeship;
- Complete all necessary administration around the CMDA.

4: APPENDIX

1 STANDARD FOR THE CMDA

AREA	KNOWLEDGE	SKILLS
ORGANISATIONAL PERFORMANCE		
OPERATIONAL STRATEGY	Understand how to develop and implement organisational strategy and plans, including approaches to resource and supply chain management, workforce development, sustainability, taking and managing risk, monitoring and evaluation, and quality assurance. Know how to manage change in the organisation.	Support the development of organisational strategies and plans. Develop and deliver operational plans; being able to set targets and KPIs, manage resources, and monitor and measure outcomes to establish operational effectiveness, efficiencies and excellence. Produce reports that clearly present information and data, using a range of interpretation and analytical processes. Gain wide support to deliver successful outcomes.
PROJECT MANAGEMENT	Know how a project moves through planning, design, development, deployment and evaluation. Understand risk management models and reporting, risk benefit analysis and H&S implications.	Plan, organise and manage resources in order to achieve organisational goals. Identify key outcomes, develop and implement plans and monitor progress, and provide reports as required. Proactively identify risk and create plans for their mitigation. Able to initiate, lead and drive change within the organisation, identifying barriers/challenges and how to overcome them. Ability to use widely recognised project management tools.

BUSINESS FINANCE	Understand financial strategies, including budgets, financial management and accounting, and how to provide financial reports. Understand approaches to procurement and contracting, and legal requirements. Understand commercial context in an organisational setting and how this changes over time.	Managing budgets, controlling expenditure and production of financial reports.
SALES & MARKETING	Know how to create marketing and sales strategies. Know how to segment and target relevant markets and customers (global and local), analysis of opportunities and ways to market. Understand the need for innovation in product and service design.	Use of customer insight and analysis of data to determine and drive customer service outcomes and improve customer relationships. Creative approaches to developing solutions to meet customer need.
DIGITAL BUSINESS & NEW TECHNOLOGY	Understand approaches to innovation and digital technologies and their impact on organisations, and how their application can be used for organisational improvement and development. Understand innovation and digital technology's impact on data and knowledge management for analysing business decision-making.	Able to identify service/organisational improvements and opportunities for innovation and growth, using qualitative and quantitative analysis of information and data and benchmarking against others.
INTERPERSONAL EXCELLENCE		
COMMUNICATION	Understand different forms of communication (written, verbal non-verbal, digital) and how to apply them. Know how to maintain personal presence and present to large groups. Awareness of interpersonal skills of effective listening, influencing techniques, negotiating and persuasion.	Communicate clearly, effectively and regularly using oral, written and digital channels and platforms. Use active listening and open questioning to structure conversations and discussions, and able to challenge when appropriate. Manage and chair meetings and clearly present actions and outcomes. Ability to apply influencing and persuading skills, to the dynamics and politics of personal interactions.
LEADING PEOPLE	Understand different inclusive leadership styles and models, how to develop teams and support people using coaching and mentoring approaches. Understand organisational culture and diversity management.	Able to articulate organisational purpose and values. Support the creation of an inclusive, high performance work culture. Enable others to achieve by developing and supporting them through coaching and mentoring.
MANAGING PEOPLE	Know how to recruit, manage and develop people, using inclusive talent management approaches. How to use HR systems and processes to ensure legal requirements, H&S, and	Able to build teams, empower and motivate others to improve performance or achieve outcomes. Able to delegate to others, provide clear guidance and monitor progress. Ability to set goals and accountabilities.

	well-being needs. Know how to set goals and manage performance.	
DEVELOPING COLLABORATIVE RELATIONSHIPS	Understand approaches to stakeholder, customer and supplier management, developing engagement, facilitating cross functional working and negotiation. Know how to shape common purpose, as well as approaches to conflict management and dispute resolution.	Able to build rapport and trust, develop networks and maintain relationships with people from a range of cultures, backgrounds and levels. Able to contribute within a team environment. Effectively influence and negotiate, being able to have challenging conversations and give constructive feedback. Work collaboratively with internal and external customers and suppliers.
PERSONAL EFFECTIVENESS		
AWARENESS OF SELF & OTHERS	Know how to be self-aware and recognise different learning styles. Know how to use emotional and social intelligence, and active listening and open questioning to work effectively with others.	Able to reflect on own performance, identifying and acting on learning and development needs. Ability to understand impact on others. Can manage stress and personal well-being, and confident in knowing core values and drivers.
MANAGEMENT OF SELF	Know how to manage time, set goals, prioritise activities and undertake forward planning in a business environment with a focus on outcomes.	Able to create personal development plan, and use widely recognised tools and techniques to ensure the management of time and pressure effectively, and prioritisation and strategic alignment of activities.
DECISION MAKING	Know how to undertake research, data analysis, problem solving and decision-making techniques, and understand the values, ethics and governance of your organisation.	Use evidence-based tools and ethical approaches to undertake problem solving and critical analysis, synthesis and evaluation to support decision making.
BEHAVIOURS		
TAKES RESPONSIBILITY	Drive to achieve in all aspects of work. Demonstrates resilience and determination when managing difficult situations. Seeks new opportunities underpinned by commercial acumen and sound judgement.	
INCLUSIVE	Open, approachable, authentic, and able to build trust with others. Seeks the views of others and values diversity internally and externally.	
AGILE	Flexible to the needs of the organisation. Is creative, innovative and enterprising when seeking solutions to business needs. Positive and adaptable, responding well to feedback and need for change. Open to new ways of working and new management theories.	
PROFESSIONAL	Sets an example and is ethical, fair, consistent and impartial. Operates within organisational values and adheres to CMI's Professional Code of Conduct and Practice .	

LEARNING OUTCOME REQUIRED	ASSESSMENT CRITERIA	ASSESSMENT METHODS
The candidate will...	The candidate can...	The candidate produced...
ORGANISATIONAL PERFORMANCE: DELIVERING A LONG-TERM PURPOSE		
A. OPERATIONAL STRATEGY		
<p>Know and understand:</p> <p>A1. How to develop and implement organisational strategy and plans, including approaches to resource and supply chain management, workforce development, sustainability, taking and managing risk, monitoring and evaluation, and quality assurance</p> <p>A2. How to manage change in the organisation</p> <p>Be able to:</p> <p>A3. Support the development of organisational strategies and plans</p> <p>A4. Develop and deliver operational plans; set targets and key performance indicators,</p>	<p>A1.1 Evaluate theories of organisational strategies and review own organisations strategy in the context of these</p> <p>A1.2 Analyse own organisations strategy for resource and supply chain management</p> <p>A1.3 Analyse own organisations strategy for workforce development</p> <p>A1.4 Interpret key principles of sustainability within own organisation</p> <p>A1.5 Evaluate risk management models and review own organisations approach to the identification and monitoring of risk</p> <p>A1.6 Evaluate quality assurance models in the context of own organisation.</p> <p>A2.1 Critically evaluate change management models</p> <p>A2.2 Apply relevant model(s) to effectively manage substantial change in a select area of own organisation</p> <p>A3.1 Review own organisations strategies and plans and support further development of these</p> <p>A4.1 Develop operational plan to include realistic, measurable</p>	<p>Portfolio will include evidence obtained using a range of assessment methods³ to show that the candidate has understood and applied relevant organisational theories. Evidence must demonstrate that the candidate is able to apply theory to support the development, implementation and monitoring of organisational strategies and plans.</p> <p>Work-based project will be set within the context of own organisation's strategy and make efficient use of resources available.</p> <p>Interview will test knowledge and understanding of organisational strategy and the application of this.</p>

³ For example: the portfolio will include some of the following types of evidence to demonstrate achievement against the standard: reflective journal, , assessor observations, credible witness statements, 360 degree feedback, plans, projects, assignments, presentations, research projects, reports.

<p>manage resources, and monitor and measure outcomes to establish operational effectiveness, efficiencies and excellence</p> <p>A5. Produce reports that clearly present information and data, using a range of interpretation and analytical processes</p> <p>A6. Gain wide support to deliver successful outcomes</p>	<p>targets and key performance indicators</p> <p>A4.2 Demonstrate effective operational plan delivery</p> <p>A4.3 Identify and manage appropriate resources to deliver plan</p> <p>A4.4 Accurately monitor and measure outcomes and evaluate results</p> <p>A5.1 Construct a range of detailed management reports and analyse and interpret these</p> <p>A6.1 Deliver successful outcomes demonstrating the effective use of wide support from a range of sources</p>	
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B. PROJECT MANAGEMENT

<p>Know and understand:</p> <p>B1. How a project moves through planning, design, development, deployment and evaluation</p> <p>B2. Risk management models and reporting, risk benefit analysis and health and safety implications</p> <p>Be able to:</p> <p>B3. Plan, organise and manage resources in order to achieve organisational goals</p> <p>B4. Identify key outcomes, develop and implement plans and monitor progress, and provide reports as required</p>	<p>B1.1 Analyse the key stages of a project and demonstrate the application of these</p> <p>B2.1 Evaluate risk management models and risk versus benefit</p> <p>B2.2 Present methods of reporting and monitoring risk, including health and safety, and the mitigation of identified risks</p> <p>B3.1 Exhibit the effective planning, organisation, and management of identified resources, demonstrating how this contributes to the achievement of project goals</p> <p>B4.1 Identify key project outcomes, developing and implementing plans to ensure that these are achieved</p> <p>B4.2 Monitor progress towards the achievement of project outcomes and produce reports that clearly demonstrate this</p>	<p>Portfolio will include evidence obtained using a range of assessment methods to show that the candidate has understood the project management process and has successfully applied this to produce positive outcomes.</p> <p>Work-based project will follow the principles of project management as appropriate.</p> <p>Interview will test knowledge and understanding of project management and how the candidate has applied this to achieve successful outcomes.</p>
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B5. Proactively identify risk and create plans for their mitigation	B5.1 Select and apply a risk management model to project, identifying and monitoring risks and actions to mitigate of these	
B6. Initiate, lead and drive change within the organisation, identifying barriers/ challenges and how to overcome them	B6.1 Initiate, lead and drive change within a specific area of own organisation, identifying barriers/challenges and presenting strategies to overcome these	
B7. Use widely recognised project management tools	B7.1 Demonstrate the successful use of project management tools	

C. BUSINESS FINANCE

Know and understand:		
C1 Financial strategies, including budgets, financial management and accounting, and how to provide financial reports	C1.1 Evaluate the importance of strategic financial management in relation to the organisational strategy	Portfolio will include evidence obtained using a range of assessment methods to show that the candidate has an understanding of financial management, is able to apply this and analyse financial data and draw conclusions.
C2 Approaches to procurement and contracting, and legal requirements.	C1.2 Assess the key elements of financial planning and review	Work-based project will include financial considerations as appropriate.
	C1.3 Create and analyse financial reports	Interview will test knowledge and understanding of business finance and how this has been effectively utilised by the candidate.
	C2.1 Evaluate the use of procurement and contracting and analyse their use within the context of own organisation	
	C2.2 Assess the legal requirements around procurement and contracting and how to comply with these	
C3 Commercial context in an organisational setting and how this changes over time	C3.1 Assess the commercial context that own organisation operates within	
Be able to:		
C4 Manage budgets, control expenditure and produce financial reports	C4.1 Identify how a budget can be produced taking into account financial constraints and achievement of targets, legal requirements and accounting conventions	
	C4.2 Demonstrate competent management of a budget ensuring control over expenditure in accordance with targets	

	C4.3 Access financial data, assess its validity and produce clear financial reports that analyse data and draw conclusions	
D. SALES & MARKETING		
Know and understand:		
D1 How to create marketing and sales strategies	D1.1 Evaluate sales and marketing theories to inform strategy D1.2 Assess methods for setting sales and marketing objectives D1.3 Explain methods for applying and monitoring the implementation of a sales and marketing plan	Portfolio will include evidence obtained using a range of assessment methods to show that the candidate has understood sales and marketing theories and methods, and is able to analyse and use data to meet customer needs. Work-based project will consider sales and marketing as appropriate.
D2 How to segment and target relevant markets and customers (global and local), analysis of opportunities and ways to market	D2.1 Critically evaluate types of market segmentation and apply to own organisations customer base D2.2 Analyse segments in relation to own organisation and propose a strategy to assist targeting	Interview will test knowledge and understanding of sales and marketing and how the candidate has applied this to achieve beneficial results.
D3 The need for innovation in product and service design	D3.1 Explain the importance of innovation in product and design D3.2 Analyse approaches to innovation employed by own organisation making recommendations as appropriate	
Be able to:		
D4 Use customer insight and analysis of data to determine and drive customer service outcomes and improve customer relationships	D4.1 Analyse sources of information for customer insight and data D4.2 Demonstrate use of customer insight and data to determine and drive customer service outcomes and improve customer relationships	
D5 Use creative approaches to developing solutions to meet customer need	D5.1 Demonstrate use of creative approaches in developing a range of solutions to meet customer needs and review the effectiveness of these	
E. DIGITAL BUSINESS & NEW TECHNOLOGIES		
Know and understand:		

<p>E1. Approaches to innovation and digital technologies and their impact on organisations, and how their application can be used for organisational improvement and development</p> <p>E2. Innovation and digital technology's impact on data and knowledge management for analysing business decision-making</p> <p>Be able to:</p> <p>E3. Identify service/organisational improvements and opportunities for innovation and growth, using qualitative and quantitative analysis of information and data and benchmarking against others</p>	<p>E1.1 Critically evaluate the impact of innovation and digital technologies on organisations Evaluate the use of these for organisational development</p> <p>E1.2 Review the use of innovation and digital technologies in own organisation and make recommendations for improvement</p> <p>E2.1 Analyse the impact of innovation and digital technologies on data and knowledge management</p> <p>E2.2 Demonstrate how this can be utilised for making business decisions</p> <p>E3.1 Demonstrate the use of qualitative and quantitative analysis of information to identify service/organisational improvements and opportunities for innovation and growth</p> <p>E3.2 Analyse information and data to benchmark against others</p>	<p>Portfolio will include evidence obtained using a range of assessment methods to show that the candidate has understood the use of innovation and digital technologies and the use of data and knowledge management.</p> <p>Work-based project will include innovation and digital technologies as appropriate.</p> <p>Interview will test knowledge and understanding of the application of innovation, digital technologies, data and knowledge management to business.</p>
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INTERPERSONAL EXCELLENCE

F. COMMUNICATION

<p>Know and understand:</p> <p>F1. Different forms of communication (written, verbal non-verbal, digital) and how to apply them</p> <p>F2. How to maintain personal presence and present to large groups</p> <p>F3. Interpersonal skills awareness including effective listening, influencing techniques, negotiating and persuasion</p> <p>Be able to:</p> <p>F4. Communicate clearly, effectively and regularly using oral,</p>	<p>F1.1 Evaluate different types of communication and the application of these analyse their strengths and weaknesses in different contexts</p> <p>F2.1 Determine how to maintain personal presence</p> <p>F2.2 Prepare and present successfully to large groups</p> <p>F3.1 Analyse own interpersonal skills and take responsibility to further develop of these</p> <p>F4.1 Show effective and appropriate use of all forms of communication</p>	<p>Portfolio will include evidence obtained using a range of assessment methods to show that the candidate is able to use all forms of communication appropriately and effectively, and demonstrate high level interpersonal skills in a variety of contexts.</p> <p>Work-based project will be well structured and demonstrate good written presentation skills.</p> <p>Interview will review the candidate's communication style and their ability to influence and negotiate.</p>
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<p>written and digital channels and platforms</p> <p>F5. Use active listening and open questioning to structure conversations and discussions, and able to challenge when appropriate</p> <p>F6. Manage and chair meetings and clearly present actions and outcomes</p> <p>F7. Apply influencing and persuading skills, to the dynamics and politics of personal interactions</p>	<p>F5.1 Use active listening and open questioning to structure conversations and discussions and demonstrate the use of these to challenge others when appropriate</p> <p>F6.1 Demonstrate confident and effective chairing of meetings including preparation and follow up</p> <p>F7.1 Effectively apply influencing and persuading skills to the dynamics and politics of personal interactions</p>	
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G. LEADING PEOPLE

<p>Know and understand:</p> <p>G1. Different inclusive leadership styles and models, how to develop teams and support people using coaching and mentoring approaches</p> <p>G2. Organisational culture and diversity management</p> <p>Be able to:</p> <p>G3. Articulate organisational purpose and values</p> <p>G4. Support the creation of an inclusive, high performance work culture</p>	<p>G1.1 Evaluate a range of leadership styles and models to include inclusive leadership</p> <p>G1.2 Know own leadership style and how to adapt to situations</p> <p>G1.3 Evaluate the use of coaching and mentoring approaches to supporting people and developing teams</p> <p>G2.1 Evaluate types of organisational culture and how these are created</p> <p>G2.2 Explain diversity management and review approach in own organisation</p> <p>G3.1 Explain purpose and values and analyse how effectively these are communicated and articulated in own organisation</p> <p>G4.1 Take actions that support the creation of an inclusive work culture</p>	<p>Portfolio will include evidence obtained using a range of assessment methods to show that the candidate has understood the impact of leadership on culture and is able to lead and coach people.</p> <p>Work-based project will include leading people as appropriate.</p> <p>Interview will test knowledge and understanding of leadership and own leadership style, how this can be used to affect performance.</p>
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G5. Enable others to achieve by developing and supporting them through coaching and mentoring	<p>G4.2 Take actions that support the creation of an high performance work culture</p> <p>G5.1 Enable others to achieve by developing and supporting them through coaching and mentoring</p>	
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H. MANAGING PEOPLE

<p>Know and understand:</p> <p>H1. How to recruit, manage and develop people, using inclusive talent management approaches</p> <p>H2. How to use HR systems and processes to ensure legal requirements, health and safety, and well-being needs</p> <p>H3. How to set goals and manage performance</p> <p>Be able to:</p> <p>H4. Build teams, empower and motivate others to improve performance or achieve outcomes</p> <p>H5. Delegate to others, provide clear guidance and monitor progress</p> <p>H6. Set goals and accountabilities</p>	<p>H1.1 Explain recruitment strategies and review the effectiveness of own organisations strategy</p> <p>H1.2 Examine inclusive talent management approaches and how this can be used to recruit, manage, and develop people</p> <p>H1.3 Analyse the use of inclusive talent management within own organisation</p> <p>H2.1 Discuss the use of HR systems and processes to ensure legal requirements, health and safety, and well-being needs are met</p> <p>H3.1 Critically evaluate goal setting theories and models</p> <p>H3.2 Set realistic achievable goals for others, monitoring and managing progress towards these</p> <p>H4.1 Demonstrate successful team building skills to significantly empower and motivate others</p> <p>H5.1 Identify and delegate tasks to others, demonstrating the provision of clear guidance and the effective monitoring of progress to achieve positive results</p> <p>H6.1 Set realistic goals for others and ensure accountability</p>	<p>Portfolio will include evidence obtained using a range of assessment methods that the candidate has understood and can apply inclusive approaches to recruitment and management to meet organisational needs.</p> <p>Work-based project will include managing people as appropriate</p> <p>Interview will test knowledge and understanding of people management.</p>
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I. DEVELOPING COLLABORATIVE RELATIONSHIPS

<p>Know and understand:</p> <p>I1. Approaches to stakeholder, customer and supplier</p>		<p>Portfolio will include evidence obtained using a range of</p>
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<p>management, developing engagement, facilitating cross functional working and negotiation</p> <p>I2. How to shape common purpose, as well as approaches to conflict management and dispute resolution Be able to:</p> <p>Be able to:</p> <p>I3. Build rapport and trust, develop networks and maintain relationships with people from a range of cultures, backgrounds and levels</p> <p>I4. Contribute within a team environment</p> <p>I5. Effectively influence and negotiate, being able to have challenging conversations and give constructive feedback</p> <p>I6. Work collaboratively with internal and external customers and suppliers</p>	<p>I1.1 Describe the principles of stakeholder, customer and supplier engagement and management</p> <p>I1.2 Analyse stakeholder, customer and supplier engagement and management in own organisation and identify strategies for improvement</p> <p>I1.3 Explain the benefits and challenges of cross-functional working and apply this method of working to deliver positive results</p> <p>I1.4 Evaluate negotiation strategies and practice these</p> <p>I2.1 Explain methods for shaping common purpose</p> <p>I2.2 Evaluate models of conflict management and resolution and successfully apply these</p> <p>I3.1 Develop and maintain networks and relationships</p> <p>I3.2 Build rapport and trust, demonstrating how this takes place with all people including those from different cultures, backgrounds and levels</p> <p>I4.1 Demonstrate useful contributions to a team environment</p> <p>I5.1 Demonstrate effective negotiation and influencing skills</p> <p>I5.2 Manage difficult conversations and give constructive feedback</p> <p>I6.1 Demonstrate collaborative working with internal customers</p> <p>I6.2 Demonstrate collaborative working with external customers and suppliers</p>	<p>assessment methods to show that the candidate has understood collaborative relationships and has put these into practice.</p> <p>Work-based project will include collaborative relationships as appropriate.</p> <p>Interview will test knowledge and understanding of developing and sustaining collaborative relationships.</p>
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PERSONAL EFFECTIVENESS

J. AWARENESS OF SELF AND OTHERS

<p>Know and understand:</p>		
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<p>J1. How to be self-aware and recognise different learning styles</p> <p>J2. How to use emotional and social intelligence, and active listening and open questioning to work effectively with others</p> <p>Be able to:</p> <p>J3. Reflect on own performance, identifying and acting on learning and development needs</p> <p>J4. Understand impact on others</p> <p>J5. Manage stress and personal well-being, being confident in knowing core values and drivers</p>	<p>J1.1 Evaluate theories of learning styles and apply to self and others</p> <p>J2.1 Evaluate models of emotional intelligence and their use in the workplace</p> <p>J2.3 Evaluate the concept of social intelligence and its use in the workplace</p> <p>J2.3 Explain the importance of active listening and open questioning and demonstrate their uses in working with others</p> <p>J3.1 Analyse own performance, identifying learning and development needs</p> <p>J3.2 Devise and implement strategies to address learning and development needs</p> <p>J4.1 Explain factors that influence impact on others, both positive and negative, and demonstrate a positive impact on others</p> <p>J5.1 Determine and apply stress management techniques in the workplace to ensure personal well-being</p> <p>J5.2 Demonstrate confidence in knowledge of core values and reflect these in own performance</p>	<p>Portfolio will include evidence obtained using a range of assessment methods to show that the candidate is aware of self and others has plans for self-development that will enhance impact.</p> <p>Work-based project will demonstrate effective management of self as appropriate.</p> <p>Interview will test the candidate's self-awareness, impact upon others, and strategies for development of self.</p>
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K. MANAGEMENT OF SELF

<p>Know and understand:</p> <p>K1. How to manage time, set goals, prioritise activities and undertake forward planning in a business environment with a focus on outcomes</p> <p>Be able to:</p>	<p>K1.1 Assess a broad range of techniques for managing time</p> <p>K1.2 Review own time management skills and create and implement strategies to improve</p> <p>K1.3 Evaluate goal setting theories and models</p> <p>K1.4 Set achievable goals/ objectives for self and monitor progress towards these</p>	<p>Portfolio will include evidence obtained using a range of assessment methods to show that the candidate can effectively manage self and demonstrated plans for self-improvement.</p> <p>Work-based project will demonstrate effective management of self to complete this.</p> <p>Interview will test the candidate's management of self, including self-development, and plans to maintain ongoing CPD.</p>
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K2. Create personal development plan, and use widely recognised tools and techniques to ensure the management of time and pressure effectively, and prioritisation and strategic alignment of activities	K2.1 Demonstrate use of time management techniques and tools	
	K2.2 Effectively manage own workload to achieve objectives	
	K2.3 Align personal development objectives to the organisational strategy	
	K2.4 Demonstrate ongoing commitment to personal development	

L. DECISION MAKING

Know and understand:		
L1. How to undertake research, data analysis, problem solving and decision-making techniques	L1.1 Critically evaluate research methods and the types of data generated	Portfolio will include evidence obtained using a range of assessment methods to show that the candidate is able to use strategies to solve problems and make decisions.
	L1.2 Analyse complex data & draw sensible conclusions	
	L1.3 Evaluate and apply problem solving techniques	Work-based project problem demonstrates factors affecting problem solving and decision making as appropriate. Interview will test knowledge and understanding of decision making and how the candidate utilises information to inform this.
	L1.4 Evaluate and apply decision making techniques	
L2. The values, ethics and governance of your organisation	L2.1 Describe and evaluate the values and ethics of your organisation	
	L2.2 Review the impact of the governance of your organisation in terms of the decision making process	
Be able to:		
L3. Use evidence-based tools and ethical approaches to undertake problem solving and critical analysis, synthesis and evaluation to support decision making	L3.1 Demonstrate the use of evidence based tools to solve problems	
	L3.2 Demonstrate the consistent use of critical analysis, synthesis and evaluation to support decision making	
	L3.3 Use ethical approaches in problem solving and decision making	

BEHAVIOURS

CODE OF CONDUCT

ASSESSMENT METHODS

M1. TAKES RESPONSIBILITY

<ul style="list-style-type: none"> • Drive to achieve in all aspects of work • Demonstrates resilience and determination when managing difficult situations • Seeks new opportunities underpinned by commercial acumen and sound judgement 	<ul style="list-style-type: none"> • Continually developing and maintaining professional knowledge and competence • Upholds the reputation of the profession and the institute 	<p>Portfolio will include evidence obtained using a range of assessment methods including 360 degree feedback from others to show that the candidate has demonstrated these behaviours. Interview may scrutinise and require examples of when and how the candidate demonstrates these behaviours.</p>
M2. INCLUSIVE		
<ul style="list-style-type: none"> • Open, approachable, authentic, and able to build trust with others • Seeks the views of others and values diversity internally and externally 	<ul style="list-style-type: none"> • Creates a positive impact on society • Respecting the people with whom you work 	<p>Portfolio will include evidence obtained using a range of assessment methods including 360 degree feedback from others to show that the candidate has demonstrated these behaviours. Interview may scrutinise and require examples of when and how the candidate demonstrates these behaviours.</p>
M3. AGILE		
<ul style="list-style-type: none"> • Flexible to the needs of the organisation • Is creative, innovative and enterprising when seeking solutions to business needs • Positive and adaptable, responding well to feedback and need for change • Open to new ways of working and new management theories 	<ul style="list-style-type: none"> • Acts in the best interest of organisation, customers, clients and/or partners 	<p>Portfolio will include evidence obtained using a range of assessment methods including 360 degree feedback from others to show that the candidate has demonstrated these behaviours. Interview may scrutinise and require examples of when and how the candidate demonstrates these behaviours.</p>
M4. PROFESSIONAL		
<ul style="list-style-type: none"> • Sets an example, and is ethical, fair, consistent and impartial • Operates within organisational values and adheres to CMI's Professional Code of Conduct and Practice 	<ul style="list-style-type: none"> • Behaves in an open, honest and trustworthy manner • Acts in the best interest of organisation, customers, clients and/or partners • Upholds the reputation of the profession and the institute 	<p>Portfolio will include evidence obtained using a range of assessment methods including 360 degree feedback from others to show that the candidate has demonstrated these behaviours. Interview may scrutinise and require examples of when and how the candidate demonstrates these behaviours.</p>

Chartered Management Institute (CMI)

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