

# Advertising and Media Executive Apprenticeship, Level 3: End-point Assessment Plan

## Introduction & Overview

This document sets out the requirements for end-point assessment (EPA) for the Advertising and Media Executive apprenticeship standard. It is written for end-point assessment organisations who need to know how EPA for this apprenticeship must operate. It will also be of interest to Advertising and Media Executive apprentices, their employers and training providers.

Full time apprentices will typically spend 18 months on-programme working towards the apprenticeship standard, with a minimum of 20% off-the-job training.

The EPA should only start once the employer is satisfied that the apprentice is consistently working at or above the level set out in the standard, the pre-requisite gateway requirements for EPA have been met and that they can be evidenced to an EPA organisation.

As a gateway requirement, apprentices must complete a portfolio of evidence which will be used to support assessment method 2, which will be a practical observation and professional discussion. Advertising and Media Executive apprentices without English and mathematics at level 2 must achieve level 2 prior to taking their EPA. For those with an education, health and care plan or a legacy statement the apprenticeships English and maths minimum requirement is Entry Level 3, and British Sign Language qualifications are an alternative to English qualifications for those whom this is their primary language. The apprentice must also pass the IPA Foundation Certificate.

The EPA must be completed over a maximum total assessment time of 3 hours, within a six month period, after the apprentice has met the EPA gateway requirements.

The EPA must be conducted by an organisation approved to offer services against this apprenticeship standard, as selected by the employer, from the Education & Skills Funding Agency's Register of End Point Assessment Organisations.

The EPA consists of two distinct assessment methods:

- Method 1: Project Showcase (Work based project with slide deck, oral presentation and Q&A)
- Method 2: Professional discussion and practical observation (supported by a portfolio of evidence)

Performance in the EPA will determine the apprenticeship grade of fail, pass, or distinction.

<b>On-programme (typically 18 months)</b>	<b>End Point Assessment Gateway</b>	<b>End Point Assessment (maximum 6 months)</b>
Training to develop the occupation standard's knowledge, skills and behaviours	English/maths Level 2 or Entry Level 3 or British Sign Language qualification alternatives	Project Showcase (Work based project with slide deck, oral presentation and Q&A)
Working towards English/maths Level 2 or Entry Level 3, or British Sign Language qualification alternatives (if required)	Agreement of work-based project	Practical Observation and Professional discussion (supported by a portfolio of evidence)
Building up the portfolio of evidence	Completed portfolio of evidence	
	Employer satisfied apprentice is consistently working at or above the level of the standard	Graded fail, pass or distinction
Working towards achieving the IPA Foundation Certificate	IPA Foundation Certificate	

Diagram 1. Typical Advertising and Media Apprenticeship Summary

## End-point Assessment Gateway

The EPA should only start once the employer is satisfied that the apprentice is consistently working at or above the level set out in the standard, the pre-requisite gateway requirements for EPA have been met and that they can be evidenced to an EPA organisation. Employers may wish to take advice from their apprentice's training provider(s).

Gateway requirements:

- Apprentices without level 2 English and mathematics will need to achieve this prior to taking the end-point assessment. For those with an education, health and care plan or a legacy statement the apprenticeships English and maths the minimum requirement is Entry Level 3, and British Sign Language qualifications are an alternative to English qualifications for those whom this is their primary language.
- A completed portfolio of evidence (see portfolio section below)
- Achievement of the IPA Foundation Certificate
- Agreement by the apprentice's employer and an EPAO of a work-based project, to be completed by the apprentice during the EPA period. The work-based project will be the basis for the project showcase assessment method.
- All assessment methods must be successfully completed within a 6 month period of each other, after the EPA gateway. The start of the 6 month EPA period will begin when the apprentice passes through the gateway.

Requirements of the Portfolio of evidence:

On commencement, the Advertising and Media Executive will need to complete a portfolio of evidence.

This is a compulsory component that underpins the EPA professional discussion and practical observation. Eight questions will be asked in the professional discussion and if possible, they must relate to evidence seen in the observation component. However, to ensure that no apprentice is disadvantaged due to lack of opportunity arising during the observation, in such cases the assessor may refer instead to evidence in the portfolio to provide context to their question.

The portfolio must:

- document off-the-job training that the apprentice has completed; showing a minimum of 20% of their employed time has been off-the-job training (e.g. online learning, completion of qualifications)
- contain evidence demonstrating competence against the KSBs. Individual pieces of evidence can be used to demonstrate competence against one or more KSB. Evidence sources may include evidence of work undertaken which may be supported by: client feedback, witness testimonies, individual learner reflection, employer/trainer feedback, training records, appraisal records, training course completion. This list is not definitive, other evidence sources are permissible. Prior to entering the gateway, the

employer, taking advice from the training provider (if applicable) and in consultation with the apprentice will review and confirm that all KSBs have been evidenced.

## End-point Assessment Methods, Timescales & Location

The end-point assessment consists of two distinct assessment methods:

- Project Showcase (Work based project with slide deck, oral presentation and Q&A)
- Professional discussion and practical observation (supported by a portfolio of evidence)

The end-point assessment must be completed over a maximum period of six months, after the apprentice has met the EPA gateway requirements.

The Project Showcase should be commenced first as this will provide the opportunity for the assessment for both assessment methods to take place on the same day .

EPAOs must ensure that the presentation component from assessment method 1 and the professional discussion component from assessment method 2 are conducted in a suitable controlled environment i.e. quiet room free from distraction and influence, with the necessary equipment for each assessment method e.g. computer, power-point facilities (if required by the apprentice).

It is anticipated that EPAOs will use the apprentice's employer's premises wherever possible when carrying out the Observation component in order to minimise costs. The Observation may be conducted face-to-face or via an online platform e.g. video-conferencing. EPAOs must ensure appropriate methods to prevent misrepresentation are in place should an online option be used. For example, screen share and 360-degree camera function when the Observation is to be viewed on-line.

Requirements for each assessment method are detailed below.

### **Method 1 – Project Showcase (Work based project, with slide deck, oral presentation and Q&A)**

The Project Showcase has three components (a **slide deck, oral presentation and Q&A**) that together should evidence the Knowledge, Skills and Behaviours (KSBs) mapped to this assessment method in Annex A. The Project Showcase is based upon a work based project which is undertaken by the apprentice.

The work based project is a substantive piece of work, requiring the apprentice to demonstrate their skills through delivering a defined advertising and media activity appropriate to the role of an Advertising and Media Executive.

The employer has flexibility on the nature of this work, but the following must be capable of being evidenced:

- Working for clients
- Working on a brief
- Showing how their role fits in with their employers aims
- Links to commercial objectives

The EPAO will provide appropriate guidance/criteria and templates to support preparation of projects. Employers, with the support of their training provider if requested, will use this project guidance/criteria to support the apprentice to develop a project outline, the project should be based on a real business requirement (i.e. not simulated) to best test competence. The project outline should be discussed and agreed by the employer and the EPAO at EPA gateway, attended by the apprentice supported by their line manager. The EPAO must create a sample project outline to support the apprentice with this.

### **Project Showcase – Work based project component**

The Work based project should:

- Be completed within 20 working days of commencement.
- Be based on the delivery of a specific advertising and media project drawn from the employers current workload.
- Provide opportunity for the apprentice to demonstrate the KSBs as outlined in Annex A.
- The chosen project should be within the remit of the apprentice's role, and should be verified as his or her own work
- The project outline should be discussed and agreed by the employer and the EPAO at EPA gateway, attended by the apprentice supported by their line manager.

### **Project Showcase - Project slide deck component**

- Twenty working days after commencement of the project, the apprentice must submit a project slide deck to the EPAO. The apprentice will use this when making their oral presentation.
- The slide deck must contain 10-12 slides to support the oral presentation (notes to support the oral presentation of the slide show are allowed if recorded in the presentation notes area of the slide deck, but no separate notes can be brought to the presentation).
- Content must include reference to working for clients, working on a brief, showing how their role fits in with their employers aims and links to commercial objectives.

It is left to the apprentice to use their creativity to select the most appropriate slide content. EPAOs must ensure any reasonable presentational requirements are in place e.g. power-point facilities; apprentices must make any requirement requests at least one week prior to the scheduled date for the presentation and Q&A.

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## **Project Showcase – Oral Presentation and Q&A component**

The oral presentation should demonstrate how the apprentice delivered the defined advertising and media activity as agreed in the project outline. It must make reference to working for clients, working on a brief, showing how their role fits in with their employers aims and cover the links to commercial objectives.

The oral presentation should take 30 minutes (+/- 10%).

- EPAOs must schedule the Presentation with Q&A component to take place within 4 weeks of submission of the Project slide deck to the EPAO and within the maximum 6 month EPA period, giving the apprentice and employer a minimum of 4 weeks' notice of the time, date and venue. (This can be achieved by scheduling the date when the project commences, rather than when the slide deck has been submitted).

The presentation with questioning must take place on a one-to-one basis in a single session between an independent assessor and the apprentice, this may be delivered using technology such as video-conferencing or in person.

Prior to the presentation and Q&A components taking place, the independent assessor (IA) must have reviewed the apprentice's slide deck against the criteria in Annex A and prepared provisional questions for the Q&A. These questions can be modified to take account of the presentation evidence. The EPAO should provide guidance and sample questions for the IAs on this. The total time for the presentation and Q&A components is 60 minutes (30 minutes (+/- 10% for the presentation and 30 minutes (+/- 10%) for the questioning).

The focus of the 30 minute (+/-10%) presentation component is for the apprentice to give an evaluation of their work during the project.

The presentation component should aim to evidence the Knowledge, Skills and Behaviours (KSBs) mapped to this method in Annex A.

The IA will not only assess the content of the presentation but also the delivery and communication skills (as required in the standard).

The presentation component will be followed by a 30 minute (+/-10%) Q&A component session with the IA, this will allow the IA to further discuss and test elements of the presentation. It will also test any areas of the work based project highlighted by the IA during review of the slide deck as needing further investigation/testing and seek to explore any KSBs mapped to this assessment method that are yet to be evidenced. The independent assessor must ask the apprentice 8 open questions; follow up questions are allowed to seek clarification. Questions must seek to assess KSBs mapped to this method not evidenced through the slide deck and presentation, and depth of understanding to assess performance against the distinction criteria.

EPAOs must produce sample questions and guidance on the Q&A for independent assessors. Independent assessors must holistically assess the Project Showcase using the grading criteria in Annex B.

### **Assessment Method 2 – Professional discussion and practical observation (supported by a portfolio of evidence)**

- Apprentices must be observed by an independent assessor interacting with a variety of people, who may include customers or colleagues to assess the areas of knowledge, skills and behaviours mapped in Annex 1. Providing the opportunity to assess both core and their chosen option KSBs. For one hour (+/- 10%).
- The observation should aim to facilitate demonstration of the specified behaviours listed below as how individuals interact with others is vitally important to this role. The observation should aim to give the apprentice an opportunity to demonstrate the following behaviours:
  - B1. Flexible problem solver with ability to help team prioritise effectively
  - B3. Embraces problems as challenges to be solved, displays ‘can-do’ attitude
  - B4. Behaves with versatility and others respond positively to them (they are “likable”)
  - B5. Display empathy and patience with a variety of different personality types and others respond positively to them
  - B6. Exhibits curiosity about people, their motivations and how to get the best out of them
  - B8. Shows resilience (e.g. doesn’t take things too personally, keeps going through difficult situations)
  - B9. Takes responsibility for learning under pressure

It is recognised that as this is a workplace observation, opportunity to demonstrate all of the above may not occur, therefore anything not covered will need to be covered in the professional discussion. To help EPAOs work with large and small employers to select the most suitable time for the observation to take place, which will maximise opportunity to demonstrate the behaviours, examples of possible observation situations are listed in Annex C. This list is not exhaustive.

- KSBs observed and answers to questions must be documented by the independent assessor.
- Observations must be carried out over a maximum total assessment time period of 1 hour.



- Observations must be conducted in a realistic work situation under normal conditions. It is anticipated that assessment organisations will use the apprentice’s normal work environment to carry out the observation.
- Observation specifications must be determined and standardised by assessment organisations, in consultation with representative employers.
- The assessor should observe only and not interact with the apprentice during the observation. (This will be done at the professional discussion component).
- After the observation, the independent assessor will have a total amount of time of 1 hour (+/- 10%), to hold a professional discussion with the apprentice. The discussion will be based on their observations and also supported by the portfolio of evidence. They will ask 8 open questions to assess the KSBs in Annex A. They may ask follow up questions where clarification is required. Questioning must be completed within the total time allowed for the professional discussion.
- EPAOs must develop ‘test banks’ of open questions of sufficient size to prevent predictability and review them regularly to ensure they, and the questions they contain, are fit for purpose.

## Apprenticeship Grading

Independent assessors must individually grade each assessment method – fail, pass or distinction, according to the requirements set out in this plan. Restrictions on grading apply where apprentices re-sit/re-take an assessment method – see re-sit/re-take section below.

An independent assessor must combine the grades of both assessment methods to determine the EPA grade. To achieve an EPA pass, apprentices must achieve a pass or distinction in both assessment methods. To achieve an EPA distinction, apprentices must achieve a distinction in both assessment methods. See grading combinations table below.

Where more than one independent assessor is involved, the independent assessor responsible for the assessment method completed last will be responsible for combining the grades.

Independent assessors’ decisions must be subject to moderation by the EPAO – see internal quality assurance section below. Decisions must not be confirmed until after moderation.

Assessment method 1	Assessment method 2	EPA grade
Fail	Fail	Fail
Pass	Fail	Fail
Fail	Pass	Fail
Distinction	Fail	Fail
Fail	Distinction	Fail
Pass	Pass	Pass
Distinction	Pass	Pass
Pass	Distinction	Pass
Distinction	Distinction	Distinction

## Diagram 2. Grading combinations

### **Re-sit and re-take information**

Apprentices who fail one or more EPA method will be offered the opportunity to take a re-sit/retake. Re-sits/re-takes must not be offered to apprentices wishing to move from pass to distinction. A re-sit does not require further learning, whereas a re-take does.

The overall apprenticeship grade will be capped at a pass if a retake is required. Where a re-sit is required due to exceptional circumstances (for example death of close relative, sickness or injury, but this list is not exhaustive) as no additional training is required for a re-sit, therefore the grade for re-sits will not be capped.

The apprentice's employer will need to agree that a re-sit/re-take is an appropriate course of action. Apprentices should have a supportive action plan to prepare for the re-sit/re-take.

An individual EPA method re-sit/re-take must be taken during the maximum EPA period i.e. 6 months from commencement of the first assessment method.

For assessment method 1 EPAOs must ensure that apprentices complete a different project if they do not pass the assessment method.

For assessment method 2, EPAOs must ensure that the observation and interview is conducted again if the original method is failed.

### **End-point Assessment Organisations**

Employers must choose an independent EPAO approved to deliver the EPA for this apprenticeship from the Education & Skills Funding Agency's (ESFAs) Register of End Point Assessment Organisations (RoEPAO). Arrangements for accessibility must be in place which must mimic what is in place in the workplace

### **Requirements for Independent Assessors**

EPAOs must appoint:

- independent assessors to assess and grade the assessment methods
- quality assurance staff to undertake moderation of EPA

Independent assessors must meet the following requirements:

- be independent of the apprentice, their employer and training provider(s) i.e. there must be no conflict of interest
- have had training from their EPAO in terms of good assessment practice, operating the assessment tools and grading
- have appropriate experience working in an advertising and media occupation at level 4 or above

- have completed a minimum of 3-days continuing professional development (CPD) relevant to advertising and media in the last year; they do not necessarily still need to be employed in an advertising or media occupation
- undertake a minimum of 3-days' EPAO standardisation training per year
- undertake EPAO training

Quality assurance staff must hold or be competent to deliver quality assurance (for example, working towards quality assurance qualifications.) They must be independent of the apprentice, their employer and training provider i.e. there must be no conflict of interest.

### **Internal quality assurance**

Internal quality assurance refers to the requirements that EPA organisation must have in place to ensure consistent (reliable) and accurate (valid) assessment decisions. EPA organisations for this EPA must undertake the following:

- appoint independent assessors that meet the requirements as detailed in this plan – see above
- provide 3 days annual training for independent assessors in terms of good assessment practice, operating the assessment tools and grading
- new assessors must be trained in the use of the assessment tools as necessary
- have quality assurance systems and procedures that support fair, reliable and consistent assessment across organisation and over time
- operate regular standardisation events that enable assessors to attend a minimum of 1 event per year
- operate moderation of assessment activity and decisions, through examination of documentation and observation of activity, with a minimum of 20 percent of each independent assessors' assessments moderated

### **Assessment tools and materials**

EPA organisations must produce assessment tools and supporting materials for the EPA that follow best assessment practice, as follows:

- Documentation for recording assessment evidence and decisions
- Guidance for independent assessors on conducting the EPA
- Guidance for apprentices, their employers and training providers on the EPA
- A bank of sample questions for assessment method 2 which must be of sufficient size to prevent predictability and review them regularly to ensure they are fit for purpose

### **External Quality Assurance**

External quality assurance for this apprenticeship standard will be undertaken by the Institute for Apprenticeships.

## Implementation

**Affordability:** It is anticipated that the EPA will not represent more than ###% of the maximum funding band for this apprenticeship (band # - £###).

The following factors should ensure the EPA is affordable:

- Employers premises should be used for EPA venues where possible
- The work-based project is based on real work completed for the apprentice's employer, adding value to the employer
- Observation, presentation and interview components can all happen on the same day.

## Volumes

It is anticipated that there will be 500 starts on this apprenticeship and 750 per year once established.

## Annex A – Knowledge, Skills and Behaviours to be assessed by each assessment method

Assessment method	Key
Project Showcase	PS
Professional Discussion and Practical Observation (supported by a portfolio of evidence)	PD

Knowledge statement - Core	Assessment method
<b>K1.</b> The role creative and media plays for clients and the links to commercial objectives	PD
<b>K2.</b> Project management techniques	PS
<b>K3.</b> The systems and digital technologies that are used in agencies such as Sage, scheduling tools and Excel	PD
<b>K4.</b> Construction of accurate and timely reports and minutes	PD
<b>K5.</b> The lifecycle of an advertising campaign i.e. what needs to happen when	PD
<b>K6.</b> The different roles performed by different agencies (mainly media and creative), different parts of agencies and the core services of their own organisation	PD
<b>K7.</b> The key legal, regulatory and ethical issues for advertising and media e.g. advertising to children, data regulation with relevance to advertising, GDPR	PD
<b>K8.</b> The commercial dynamics of advertising and media	PS
<b>K9.</b> The foundation advertising landscape and how it is changing e.g. the impact of digital technology and platforms, the proliferation of options for content and media, the complex consumer journey to purchase, the rise of big data, the corporate landscape, how advertising's effectiveness is evaluated	PS
<b>K10.</b> Principles of third party (e.g. client, supplier, regulatory body) management and delivery	PS
<b>K11.</b> Understand the value the supply chain can provide e.g. digital marketing	PD
<b>K12.</b> Understands the digital landscape and how it impacts on any given campaign	PS
<b>Knowledge Statement Option 1 - Creative</b>	
<b>K13</b> The creative process/dynamic and how people operate in that environment; how to communicate effectively with each group	PD
<b>K14</b> New creative and production techniques, tools and trends e.g. using Influencers to reach audiences, using Snapchat Stories, how to use virtual reality, the possible benefits of AI	PD

<b>K15</b> Understand the different elements of a creative idea (copy and art direction) and its execution, understanding the relative importance of those different elements, e.g. does a change to the execution change the idea?	<b>PD</b>
<b>K16</b> Understand how the effectiveness of a campaign is measured against client business objectives.	<b>PS</b>
<b>K17</b> Understand the fundamentals of why brand building is important	<b>PD</b>
<b>K18</b> . How to influence people e.g. listen to them, always try for win:win	<b>PD</b>
<b>Knowledge Statement Option 2 - Media</b>	
<b>K19</b> . The media buying process/dynamic and how people operate and negotiate in that environment	<b>PD</b>
<b>K20</b> New media buying techniques, tools and trends e.g. new programmatic (automated) media buying platforms; using new digital mediums such as Twitter, Spotify; new data sources from Google and others	<b>PD</b>
<b>K21</b> . Up to date media metrics e.g. latest Google Adwords, latest viewing figures from BARB	<b>PD</b>
<b>K22</b> Understands how the location and timing of media interacts with creative content	<b>PS</b>
<b>K23</b> . Understand how media planning and buying is evaluated short and long term	<b>PS</b>

<b>Skills Statements -Core</b>	<b>Assessment method</b>
<b>S1.</b> Identify the ways in which creative and media can help organisations to achieve corporate objectives	<b>PS</b>
<b>S2.</b> Dispassionately structure problems and approaches to solving them	<b>PS</b>
<b>S3.</b> Manage projects using project management techniques in order to ensure campaigns are on track e.g. accurate timing plans, and they are also successfully managing their to do list	<b>PD</b>
<b>S4.</b> Make use of the systems and technologies that are used in agencies, to help plan, budget, and bill.	<b>PD</b>
<b>S5.</b> Produce professional communication e.g. correct names, spelling, grammar, branding on e.g. PowerPoint, emails, minutes, reports	<b>PD</b>
<b>S6.</b> Manage timelines effectively, prioritising appropriately	<b>PD</b>
<b>S7.</b> Apply knowledge of the interface and the dynamics of the different agencies (mainly media and creative) for a smooth flow of work	<b>PS</b>
<b>S8.</b> Adhere to the legislative regulations that apply in the advertising and media industry plus their own organisational policies and procedures	<b>PD</b>
<b>S9.</b> Demonstrate some upward, some supplier and client management around commercial realities e.g. a new digital opportunity or a TV production problem	<b>PS</b>
<b>S10.</b> Help solve practical and creative problems (e.g. report on consumer habits, gathering useful data around evaluation) within defined budgets and timescales, influencing outcomes without jeopardising relationships	<b>PD</b>

<b>S11.</b> Use third party management techniques combined with interpersonal skills (e.g. active listening and influencing) to communicate effectively, e.g. coordinating response to a client brief	<b>PD</b>
<b>S12.</b> Ensures delivery of that supply chain value, on time	<b>PD</b>
<b>S13.</b> Deploy the right digital medium to guarantee the most effective result e.g. using Google Analytics to check key words	<b>PS</b>
<b>Skill Statements Option 1 - Creative</b>	
<b>S14</b> Communicate with clients, colleagues, regulatory bodies (such as the Advertising Standards Authority or Clearcast), suppliers (such as photographers or research companies); by phone, in meetings, through presentations, in emails and written documents such as agendas, competitive reviews, proposals, minutes of calls/meetings, status reports. Co-ordinate feedback.	<b>PD</b>
<b>S15 .</b> Apply their understanding of creative and production techniques to help the idea appear in the correct format	<b>PS PD</b>
<b>S16</b> Apply their understanding of the different elements of a creative idea to help evaluate the different elements and guide the execution phase to protect the most important ones	<b>PS PD</b>
<b>S17</b> Help obtain the right data	<b>PS PD</b>
<b>S18</b> Able to understand and report differences in ways competitor brands market themselves	<b>PD</b>
<b>S19</b> Ability to influence people e.g. clients to buy amended creative work or authorise a late invoice	<b>PD</b>
<b>Skill Statements Option 2 - Media</b>	
<b>S20 .</b> Coordinate responses to media owners and intermediaries (including automated platforms), helping manage all aspects of the process.	<b>PD</b>
<b>S21</b> Apply their knowledge of media buying to communicate with clients, colleagues, regulatory bodies (such as the Advertising Standards Authority), media owners (such as commercial television channels, newspapers/magazines, billboard companies etc.), or media intermediaries/platforms (such as programmatic advertising platforms, Facebook, Google); by phone, in meetings, through presentations, in emails and written documents such as a media plan	<b>PD</b>
<b>S22.</b> How to access the media metric data and report it accurately to the team regularly	<b>PS PD</b>
<b>S23</b> Help research how the message/creative idea might be best distributed to reach the target audience in the most effective way e.g. time of day, and make recommendations based on this	<b>PS</b>
<b>S24</b> Help obtain the right data	<b>PS</b>
<b>S25</b> How to negotiate for long term relationships	<b>PD</b>

Behaviour statements	Assessment method
<b>B1.</b> Flexible problem solver with ability to help the team prioritise effectively	<b>PD</b>
<b>B2.</b> Shows attention to detail	<b>PS PD</b>
<b>B3.</b> Embraces problems as challenges to be solved, displays 'can-do' attitude	<b>PD</b>
<b>B4.</b> Behaves with versatility and others respond positively to them (they are "likeable")	<b>PD</b>
<b>B5.</b> Display empathy and patience with a variety of different personality types and others respond positively to them	<b>PD</b>
<b>B6.</b> Exhibits curiosity about people, their motivations and how to get the best out of them	<b>PD</b>
<b>B7.</b> Exhibits curiosity about the industry, positive approach to learning	<b>PS</b>
<b>B8.</b> Shows resilience (e.g. doesn't take things too personally, keeps going through difficult situations)	<b>PD</b>
<b>B9.</b> Takes responsibility for learning under pressure	<b>PD</b>



## Annex B –Grading Criteria

### METHOD 1

#### Method 1 - Project Showcase Grading Criteria

For all of the KSBs below, the Fail Criteria is ‘apprentice has not met the pass criteria’

To achieve a Pass, the apprentice must meet all of the pass criteria.

To achieve a Distinction, the apprentice must meet at least 50% of the Distinction criteria.

Knowledge statement - Core	Distinction	Pass
<b>K2.</b> Project management techniques	Explains the importance of project management techniques, such as timing plans, to do lists, used to keep campaigns on track and benefits of forward planning	Able to explain two project management techniques, such as timing plans, to do lists, used
<b>K8.</b> The commercial dynamics of advertising and media	Describe one way in which this commercial knowledge could help your agency make money e.g. cutting bad debt by x months	Describe the way your agency finance system works and one important role you provide e.g. PO raising
<b>K9.</b> The foundation advertising landscape and how it is changing e.g. the impact of digital technology and platforms, the proliferation of options for content and media, the complex consumer journey to purchase, the rise of big data, the corporate landscape, how advertising’s effectiveness is evaluated	Explains the benefits of understanding the changing advertising landscape to their organisation	Give two examples of how changes in the last five years to the advertising landscape have made an impact on agency work e.g. new ways to evaluate effectiveness such as You Tube spoofs, new ways to track path to purchase
<b>K10.</b> Principles of third party (e.g. client, supplier, regulatory body) management and delivery	Describe how your knowledge has added value/profit through proactive enhancement of the day to day running of the account	Describe everyone’s responsibilities internal and external, how the agency functions and how the team work together to best deliver the work

<b>K11.</b> Understand the value the supply chain can provide e.g. digital marketing	Able to explain the benefit of services provided by members of the supply chain	Describe one service from your agency or supplier that a client does not currently use but might in future and why e.g. UX
<b>Knowledge Statement Option 1 - Creative</b>	<b>Distinction</b>	<b>Pass</b>
<b>K16</b> Understand how the effectiveness of a campaign is measured against client business objectives	Able to explain the business goal of one client and how the effectiveness of a campaign could be explained to them to influence next steps	Able to explain the business goal of one client and how the campaign is helping
<b>Knowledge Statement Option 2 - Media</b>	<b>Distinction</b>	<b>Pass</b>
<b>K22</b> Understands how the location and timing of media interacts with creative content	Describe why location and timing of media placement is important and give an example of a campaign that utilises location/timing to optimise creative performance	Describe why location and timing of media placement is important in a creative context
<b>K23</b> Understand how media planning and buying is evaluated short and long term	Able to expand the pass criteria to include comment on the metrics used and their benefits	Able to name two types of media metrics used to evaluate their media planning and buying including long term and short term
<b>Skills Statements -Core</b>	<b>Distinction</b>	<b>Pass</b>
<b>S1.</b> Identify the ways in which creative and media can help organisations to achieve corporate objectives	Identify four ways in which creative and/or media skills have been deployed to help organisations achieve their corporate objectives	Identify two ways in which creative and/or media skills have been deployed to help organisations achieve their corporate objectives
<b>S2.</b> Dispassionately structure problems and approaches to solving them	Describe how they structured their responses to a problem and an alternative approach they could have taken, describing the benefits of each	Describe how they structured a response to a problem

<b>S7.</b> Apply knowledge of the interface and the dynamics of the different agencies (mainly media and creative) for a smooth flow of work	Describes the impact of different agencies not working closely	Illustrate one example of how they applied knowledge of what a different agency's role should be to ensure a smooth flow of work e.g. a creative agency knowing when they needed to work closely with a media agency and vice versa
<b>S9.</b> Demonstrate some upward, some supplier and client management around commercial realities e.g. a new digital opportunity or a TV production problem	Describe the risks and likely impact of not upwardly managing suppliers and clients	Describe one example of successfully managing a supplier or client in a context with commercial implications
<b>S13.</b> Deploy the right digital medium to guarantee the most effective result e.g. using Google Analytics to check key words	Discuss usage of four digital channels or techniques	Discuss usage of two digital channels or techniques
<b>Skill Statements Option 1 – Creative</b>	<b>Distinction</b>	<b>Pass</b>
<b>S15 .</b> Apply their understanding of creative and production techniques to help the idea appear in the correct format	Illustrate the benefits and disadvantages of two creative or production techniques to help two ideas appear in the correct format	Illustrate how they applied understanding of a creative or production technique to help an idea appear in the correct format
<b>S16 .</b> Apply their understanding of the different elements of a creative idea to help evaluate the different elements and guide the execution phase to protect the most important ones	Able to build on their example by explaining how they identified the area to protect and the steps they took to identify how to do so	Able to discuss one example how they have used their understanding of the different elements of the executional phase e.g. explaining that a change to the execution alters the idea
<b>S17 .</b> Help obtain the right data	Describe two instances of how they obtained data and made sure it was accurate	Describe one instance of how they obtained

		data and made sure it was accurate
<b>Skill Statements Option 2 – Media</b>	<b>Distinction</b>	<b>Pass</b>
S22 How to access the media metric data and report it accurately to the team regularly	Explains the importance of accurate data and ways they can ensure this	Demonstrate or describe how media metric data has been accessed and their role in regularly and accurately reporting these statistics to the team
S23 Help research how the message/creative idea might be best distributed to reach the target audience in the most effective way e.g. time of day, and make recommendations based on this	Detail two examples of how their research has helped the team target the audience successfully e.g. they have used Touchpoints to work out when the consumer will be most receptive and to what format	Detail how their research has once helped the team target the audience successfully e.g. they have used Touchpoints to work out when the consumer will be most receptive
S24 Help obtain the right data	Describe the impact of using inaccurate data in a campaign and how to assess reliability of data sources	Describe one instance of how they obtained data and made sure it was accurate e.g. correct price, clarity of offer; and useful e.g. an effectiveness measure which helps prove the effectiveness of the campaign
<b>Behaviour statements</b>	<b>Distinction</b>	<b>Pass</b>
<b>B2.</b> Shows attention to detail	Describes why this is important at work and give at least four examples of where they have shown attention to detail	Describes why this is important at work and gives at least two examples of where they have shown attention to detail
<b>B7.</b> Exhibits curiosity about the industry, positive approach to learning	Describes four examples of news within the industry (can include clients, people and the wider industry) and expresses a point of view on two of them	Describes two examples of news within the industry (can include clients, people and the wider industry) and expresses a point of view on one of them

## METHOD 2

### Professional Discussion and Practical Observation (supported by a portfolio of evidence) – Grading Criteria

For all of the KSBs below, the Fail Criteria is ‘apprentice has not met the pass criteria’

To achieve a Pass, the apprentice must meet all of the pass criteria.

To achieve a Distinction, the apprentice must meet at least 50% of the Distinction criteria.

Knowledge statement - Core	Distinction	Pass
<b>K1.</b> The role creative and media plays for clients and the links to commercial objectives	Able to describe in detail the role creative and media plays for clients and to give an in-depth understanding of how this can link to commercial objectives, with examples of personal experiences and how they made an impact	Able to describe the role creative and media plays for clients and to give a summary demonstrating understanding of how this can link to commercial objectives
<b>K3.</b> The systems and digital technologies that are used in agencies such as Sage, scheduling tools and Excel	Describes one example of how incorrect usage can impact on the team and/or client	Describe two ways in which information system tools can benefit your team and clients
<b>K4.</b> Construction of accurate and timely reports and minutes	Describes one example of how failure to provide accurate and timely reports and minutes can have a detrimental impact e.g. client may refuse to pay for a cost if it is not minuted	Describe importance of accurate and timely reports and minutes e.g. everyone up to speed with what needs to be done
<b>K5.</b> The lifecycle of an advertising campaign i.e. what needs to happen when	Able to describe two pivotal moment in the lifecycle and explain their importance to the overall process	Able to describe the order of the advertising campaign lifecycle
<b>K6.</b> The different roles performed by different agencies (mainly media and creative), different parts of agencies	Describe any shortcomings/ areas for improvement in ways of working for at least two of those departments.	Describe the different departments within their own agency,

and the core services of their own organisation	Describe the core offering of their own organisation and one way in which they might sell a service to their client	outlining the key responsibilities of each department. Describe the core offering of their own organisation
<b>K7.</b> The key legal, regulatory and ethical issues for advertising and media e.g. advertising to children, data regulation with relevance to advertising, GDPR	An example of legal or regulatory knowledge which if not spotted could lead to a catastrophic mistake	Provides two examples of key legal or regulatory knowledge
<b>K12.</b> Understands the digital landscape and how it impacts on any given campaign	Able to describe where knowledge of the digital landscape proved pivotal to a campaign	Able to give an accurate description of the current digital landscape and how it can impact on any one campaign
<b>Knowledge Statement Option 1 - Creative</b>	<b>Distinction</b>	<b>Pass</b>
<b>K13</b> The creative process/dynamic and how people operate in that environment; how to communicate effectively with each group	Give an example of a situation where they were involved in a creative conversation, and were able to steer/contribute the direction of that conversation for the benefit of the overall creative idea/execution	Give an example of a situation where they were involved in a creative conversation, and describe how they communicated some important knowledge to a creative team
<b>K14 .</b> New creative and production techniques, tools and trends e.g. using Influencers to reach audiences, using Snapchat Stories, how to use virtual reality, the possible benefits of AI	Able to describe the usefulness of one new production technique or trend e.g. uptake of VR headsets reaching tipping point among consumers	Able to name and describe function of two new production techniques or trends
<b>K15</b> Understand the different elements of a creative idea (copy and art direction) and its execution, understanding the relative importance of those different elements, e.g. does a change to the execution change the idea?	Describe a situation where a seemingly minor client change had an impact on the overall creative idea and how they managed this situation	Describe the different elements of a creative execution and how they all come together to convey an idea or message
<b>K17</b> Understand the fundamentals of why brand building is important	Able to explain three risks of inadequate brand building and why this is important to marketing and communication	Able to explain one reason why brand building is important to marketing and communication

<b>K18</b> How to influence people e.g. listen to them, always try for win:win	Describe the impact of not achieving win:win and suggest a way to influence a favourable outcome if this can't be achieved in its entirety	Describe two ways that help influence people
<b>Knowledge Statement Option 2 - Media</b>	<b>Distinction</b>	<b>Pass</b>
<b>K19</b> . The media buying process/dynamic and how people operate and negotiate in that environment	Able to describe the media process stages, who does what when, and why	Able to describe the media process stages, who does what when
<b>K20</b> New media buying techniques, tools and trends e.g. new programmatic (automated) media buying platforms; using new digital mediums such as Twitter, Spotify; new data sources from Google and others	Details the benefits of one media buying technique or tool or trend they described and the limitations	Details two new media buying techniques or tools or trends
<b>K21</b> Up to date media metrics e.g. latest Google Adwords, latest viewing figures from BARB	Details four sources of up to date media metrics and how they are applied	Details two sources of up to date media metrics
<b>Skills Statements -Core</b>	<b>Distinction</b>	<b>Pass</b>
<b>S3.</b> Manage projects using project management techniques in order to ensure campaigns are on track e.g. accurate timing plans, and they are also successfully managing their to do list	Describes the risks of failing to use project management techniques and how they explain the benefits to others	Details use of two project management techniques that have helped campaigns stay on track e.g. prioritised to do list
<b>S4.</b> Make use of the systems and technologies that are used in agencies, to help plan, budget, and bill	Demonstrates use of a system and a technology used to help plan and/or budget and/or bill; able to show that this skill has profited their agency	Demonstrates use of a system and a technology used to help plan and/or budget and/or bill
<b>S5.</b> Produce professional communication e.g. correct names, spelling, grammar, branding on e.g. PowerPoint, emails, minutes, reports	Explain when email, minutes, slide decks are most appropriate and effective	Provide one example of professional communication they have produced from each of: email, minutes, a PowerPoint deck
<b>S6.</b> Manage timelines effectively, prioritise appropriately	Produce evidence of how they have managed a timeline effectively, and able to describe the method they use	Produce evidence of how they have managed a timeline effectively

	to prioritise and how it works for them	
<b>S8.</b> Adhere to the legislative regulations that apply in the advertising and media industry plus their own organisational policies and procedures	Provide four examples of using legal or regulatory knowledge, including one which would have had serious consequences if not spotted	Provide two examples of using legal or regulatory knowledge
<b>S10.</b> Help solve practical and creative problems (e.g. report on consumer habits, gathering useful data around evaluation) within defined budgets and timescales, influencing outcomes without jeopardising relationships	Detail approach to solving two practical and creative problem such as obtaining data which influenced an agency desired outcome, without jeopardising relationships	Detail approach to solving one practical and creative problem such as obtaining data which influenced an agency desired outcome, without jeopardising relationships
<b>S11.</b> Use third party management techniques combined with interpersonal skills (e.g. active listening and influencing) to communicate effectively with all, e.g. coordinating response to a client brief	Explain why you chose that interpersonal communication method and how you evaluated the effectiveness of the skill you used	Describe how an interpersonal skill helped to communicate effectively with one colleague or client or supplier
<b>S12.</b> Ensures delivery of supply chain value, on time	Can demonstrate two examples of their role in delivering supply chain value on time, and explains impact of delays	Can demonstrate one example of their role in delivering supply chain value on time
<b>Skill Statements Option 1 – Creative</b>	<b>Distinction</b>	<b>Pass</b>
<b>S14 .</b> Communicate with clients, colleagues, regulatory bodies (such as the Advertising Standards Authority or Clearcast), suppliers (such as photographers or research companies); by phone, in meetings, through presentations, in emails and written documents such as agendas, competitive reviews, proposals, minutes of calls/meetings, status reports. Co-ordinate feedback.	Explains how the most appropriate communication tool was selected and what alternative methods were considered, including reasons why they were disregarded, for the examples provided	Demonstrate two ways in which successful communication has taken place



<p><b>S18</b> Able to understand and report differences in ways competitor brands market themselves</p>	<p>Describe two examples of reporting on competitor brands e.g. by helping pull together a competitive review, describing the difference in approach taken in the two examples</p>	<p>Describe or demonstrate one example of reporting on competitor brands e.g. by helping pull together a competitive review</p>
<p><b>S19</b> Ability to influence people e.g. clients to buy amended creative work or authorise a late invoice</p>	<p>Describe two examples of how they were able to influence someone to do something they did not originally want to do, explaining the steps they took to achieve this</p>	<p>Describe one example of how they were able to influence someone to do something they did not originally want to do e.g. a creative to increase the size of the logo, or a client to pay for an extra cost, or Clearcast to approve a script for production</p>
<p><b>Skill Statements Option 2 – Media</b></p>	<p><b>Distinction</b></p>	<p><b>Pass</b></p>
<p><b>S20</b> . Coordinate responses to media owners and intermediaries(including automated platforms), helping manage all aspects of the process</p>	<p>Explains the process they took to coordinate the response, including how they identified stakeholders and how they gathered information</p>	<p>Provide one example of how they helped coordinate the team’s response to a client brief e.g. by obtaining useful data from a media owner</p>
<p><b>S221</b> Apply their knowledge of media buying to communicate with clients, colleagues, regulatory bodies (such as the Advertising Standards Authority), media owners (such as commercial television channels, newspapers/magazines, billboard companies etc.), or media intermediaries/platforms (such as programmatic advertising platforms, Facebook, Google); by phone, in meetings, through present emails and</p>	<p>Demonstrate four ways in which successful communication regarding media buying has taken place explaining how they planned the communication and what factors they took into account in e.g. convincing a client of the merits of a particular channel, ability to explain programmatic’s pros and cons</p>	<p>Demonstrate two ways in which successful communication regarding media buying has taken place e.g. convincing a client of the merits of a particular channel</p>

written documents such as a media plan		
<b>S25</b> . How to negotiate for long term relationships	Describes the different factors that need to be considered when negotiating for a long term relationship	Describes one use of negotiating techniques to ensure both parties were happy
<b>Behaviour statements</b>	<b>Distinction</b>	<b>Pass</b>
<b>B1.</b> Flexible problem solver with ability to help the team prioritise effectively	Describe ways in which you helped others prioritise and the factors you took into consideration	Describe/is observed using two examples and subsequent benefits of solving problems while working collaboratively
<b>B3.</b> Embraces problems as challenges to be solved, displays 'can-do' attitude	Explains how they go about turning problems into challenges and the factors they take into account when considering the best way to address them (e.g. time constraints, people involved, cost...)	Provides two reasons why a 'can-do' attitude is important and describes/displays one example of when they have put this into practice
<b>B4.</b> Behaves with versatility and others respond positively to them (they are "likable")	Explains how they check whether others are responding favourably to them and how they adjust their behaviour if necessary (e.g. body language, eye contact, tone of voice)	Provides two correct reasons why personal attitudes are important at work, evidencing or providing one example of their own behaviour
<b>B5.</b> Display empathy and patience with a variety of different personality types and others respond positively to them	Describes two ways in which empathy and patience can be displayed and how they know whether they are being successful	Provides two correct reasons why rapport building, understanding other's perspectives and adapting style is important at work. Demonstrates or provides one example of when they have shown this
<b>B6.</b> Exhibits curiosity about people, their motivations and how to get the best out of them	Explains why understanding other's perspectives and adapting your personal style are important at work	Provides/exhibits curiosity by questioning others

		motivations during the observation or providing two examples of occasions when they have done so
<b>B8.</b> Shows resilience (e.g. doesn't take things too personally, keeps going through difficult situations)	Explains how to recognise when feedback should be acted on and when it should not be taken personally	Provides two examples/observed encountering pressure at work, explain how they coped with this, demonstrating resilience
<b>B9.</b> Takes responsibility for learning under pressure	Explains how they planned their workload to ensure they built in time to undertake learning during times of pressure	Can describe two key benefits from learning they have participated in

## **Annex C – Observation Situations**

Examples of the sort of workplace situations that may provide good opportunities for the apprentice to demonstrate the knowledge, skills and behaviours mapped against this assessment method are:

### ***Situation One***

Update account team (or just boss) on status of various projects – what is happening and why, what they think should happen as a result and in what order i.e. what member of the team is to do what and by when and why.

### ***Situation Two***

Meeting with financial controller to discuss status of jobs on project management information system. What is on track, what is over or under and what actions you think the team should take.

### ***Situation Three***

Meeting with boss to discuss various media owner proposals/pitches. Apprentice to weigh up their offers e.g. affect to relationship, relay conversations and give an opinion on their use/price and why.

### ***Situation Four***

Apprentice takes Assessor on a tour of the agency departments, introducing some people and explaining their role and how they integrate with other functions.

### ***Situation Five***

Apprentice to brief boss and planners on data they had been requested to obtain which will help wider team decide on effectiveness of their campaign(s).

This list is not exhaustive and none of these situations are compulsory. The intention is to provide a steer to EPAOs and Employers on good opportunities for observation so they can select the most appropriate time to carry out the observation. For example in some agencies it may be possible to listen in to phone calls with clients to assess their manner with the client and how they respond to questions; or oversee e-mails to see how the apprentice responds to different stakeholders (clients, managers, peers etc); or sitting in on client status meeting with the apprentice to see how they present, engage with clients and answer questions.