Degree Apprenticeship

Individual Portfolio of Evidence Checklist

Chartered Manager Degree Apprenticeship

BA (Hons) Business Management and Leadership (WBIS)

Centre for Work Related Studies
Learning Outcomes and Assessment Criteria

The learning outcomes and assessment criteria for the Chartered Manager Degree Apprenticeship have been based upon the following:

1. Government Department for Business Innovation and Skills (BIS) level 6 descriptor:
   - Critically, review, consolidate and extend a systematic and coherent body of knowledge, utilising specialized skills across an area of study;
   - Critically evaluate new concepts and evidence from a range of sources;
   - Transfer and apply diagnostic and creative skills and exercise significant judgment in a range of situations;
   - Accept accountability for determining and achieving group and/or personal outcomes.

2. Government Office for Qualifications and Regulation of Examinations (Ofqual) level 6 descriptor:
   - Refine and use practical, conceptual or technological understanding to create ways forward in contexts where there are many interacting factors.
   - Critically analyse, interpret and evaluate complex information, concepts and ideas.
   - Understand the context in which the area of study or work is located.
   - Be aware of current developments in the area of study or work.
   - Understood different perspectives, approaches or schools of thought and the theories that underpin them.
   - Refine and use practical, conceptual or technological understanding to create ways forward in contexts where there are many interacting factors.
   - Critically analyse, interpret and evaluate complex information, concepts and ideas.
   - Understand the context in which the area of study or work is located.
   - Be aware of current developments in the area of study or work.
   - Understood different perspectives, approaches or schools of thought and the theories that underpin them.
   - Address problems that have limited definition and involve many interacting factors.
   - Determine, refine, adapt and use appropriate methods and skills.
   - Use and, where appropriate, design relevant research and development to inform actions.
   - Evaluate actions, methods and results and their implications.
   - Take responsibility for planning and developing courses of action that are capable of underpinning substantial changes or development.
   - Initiate and lead tasks and processes, taking responsibility, where relevant, for the work and roles of others.
   - Exercise broad autonomy and judgement.
**Organisational Performance – delivering a long-term purpose**

**Assessment criteria**

- The candidate can:

**Assessment methods**

- Portfolio will include evidence obtained using a range of assessment methods 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.

**Module**

- IS5158 Business Strategy and Planning
- IS5112 Transition and Change Management
- IS5154 Project and Programme Management

**Evidenced by:**

- Assignment
- Reflective Essay
- Presentation
- 360 documents
- Learning log
- Employer
- Other

**Apprenticeship Co-ordinator / PAT Date added to portfolio**

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**2. Project Management**

**Knowledge – know and understand:**

- How a project moves through planning, design, development, deployment and evaluation.
- Risk management models and reporting, risk benefit analysis and health and safety implications.

**Skills – be able to:**

- 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.
- Initiate, lead and drive change within the organisation, identifying barriers/challenges and how to overcome them.
- Use widely recognised project management tools.

**Module**

- IS6154 Project and Programme Management
- IS6017

**Evidenced by:**

- Assignment
- Reflective Essay
- Presentation
- 360 documents
- Learning log
- Employer
- Other
### Organisational Performance – delivering a long-term purpose

<table>
<thead>
<tr>
<th>Assessment criteria The candidate can:</th>
<th>Assessment methods</th>
<th>Module</th>
<th>Evidenced by:</th>
<th>Apprenticeship Co-ordinator / PAT Date added to portfolio</th>
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<tbody>
<tr>
<td><strong>3. Business Finance Knowledge</strong></td>
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<tr>
<td>Knowledge – know and understand:</td>
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<tr>
<td>3.1 Financial strategies, including budgets, financial management and accounting, and how to provide financial reports.</td>
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<td>ISS270</td>
<td>Assignment Reflective Essay Presentation 360 documents Learning log Employer Other</td>
<td>ISS270 Finance for Non-Financial Managers IS4225 The Organisation IS4225 Executive IS5017 IS5017 IS5017</td>
</tr>
<tr>
<td>3.1.1 Evaluate the importance of strategic financial management in relation to the organisational strategy.</td>
<td>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.</td>
<td>ISS270</td>
<td>Assignment Reflective Essay Presentation 360 documents Learning log Employer Other</td>
<td>ISS270 Finance for Non-Financial Managers IS4225 The Organisation IS4225 Executive IS5017 IS5017 IS5017</td>
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<tr>
<td>3.1.2 Assess the key elements of financial planning and review.</td>
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<td>3.1.3 Create and analyse financial reports.</td>
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<tr>
<td>3.2 Approaches to procurement and contracting, and legal requirements.</td>
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<tr>
<td>3.2.1 Evaluate the use of procurement and contracting and analyse their use within the context of own organisation.</td>
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<tr>
<td>3.2.2 Assess the legal requirements around procurement and contracting and how to comply with these.</td>
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<td>3.3 Commercial context in an organisational setting and how this changes over time.</td>
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<td>3.3.1 Assess the commercial context that own organisation operates within.</td>
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<tr>
<td>3.3.2 Assess the legal requirements around procurement and contracting and how to comply with these.</td>
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<td><strong>Skills – be able to:</strong></td>
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<tr>
<td>3.4 Manage budgets, control expenditure and produce financial reports.</td>
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<tr>
<td>3.4.1 Identify how a budget can be produced taking into account financial constraints and achievement of targets, legal requirements and accounting conventions.</td>
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<tr>
<td>3.4.2 Demonstrate competent management of a budget ensuring control over expenditure in accordance with targets.</td>
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<tr>
<td>3.4.3 Access financial data, assess its validity and produce clear financial reports that analyse data and draw conclusions.</td>
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<tbody>
<tr>
<td><strong>4. Sales and Marketing</strong></td>
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<tr>
<td>Knowledge – know and understand:</td>
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<tr>
<td>4.1 How to create marketing and sales strategies.</td>
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<tr>
<td>4.1.1 Explain the importance of sales and marketing objectives.</td>
<td>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.</td>
<td>IS4225 Marketing for Non-Financial Managers IS5271 Digital Business and New Technology IS5017 IS5017 IS5017 Other</td>
<td>IS4225 Marketing for Non-Financial Managers IS5271 Digital Business and New Technology IS5017 IS5017 IS5017 Other</td>
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<tr>
<td>4.1.2 Evaluate sales and marketing strategies to inform strategy.</td>
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<tr>
<td>4.1.3 Explain the importance of sales and marketing objectives and their impact.</td>
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<tr>
<td>4.2 How to segment and target relevant markets and customers (global and local), analysis of opportunities and ways to market.</td>
<td>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.</td>
<td>IS4225 Marketing for Non-Financial Managers IS5271 Digital Business and New Technology IS5017 IS5017 IS5017 Other</td>
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<tr>
<td>4.2.1 Critically evaluate types of market segmentation and apply to own organisation.</td>
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<td>4.2.2 Analyse segments in relation to own organisation and propose a strategy to assist targeting.</td>
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<tr>
<td>4.2.3 Explain the importance of market segmentation and how this has been effectively utilised by the candidate.</td>
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<tr>
<td>4.3 The need for innovation in product and service design.</td>
<td>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.</td>
<td>IS4225 Marketing for Non-Financial Managers IS5271 Digital Business and New Technology IS5017 IS5017 IS5017 Other</td>
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<tr>
<td>4.3.1 Explain methods for applying innovation employed by own organisation.</td>
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<td>4.3.2 Analyse approaches to innovation employed by own organisation making recommendations for improvement.</td>
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<tr>
<td>4.3.3 Analyse approaches to innovation employed by own organisation.</td>
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<tr>
<td><strong>Skills – be able to:</strong></td>
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<tr>
<td>4.4 Use customer insight and analysis of data to determine and drive customer service outcomes and improve customer relationships.</td>
<td>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.</td>
<td>IS4225 Marketing for Non-Financial Managers IS5271 Digital Business and New Technology IS5017 IS5017 IS5017 Other</td>
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<tr>
<td>4.4.1 Analyse sources of customer insight and data.</td>
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<tr>
<td>4.4.2 Demonstrate use of customer insight and data to influence and drive customer service outcomes and improve customer relationships.</td>
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<tr>
<td>4.4.3 Demonstrate use of creative approaches in developing customer insight and data to influence and drive customer service outcomes and improve customer relationships.</td>
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<tr>
<td>4.5 Use creative approaches to developing solutions to meet customer need.</td>
<td>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.</td>
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</table>
## Learning outcome/ outcome required The candidate will:

### Knowledge – know and understand:

5.1 Approaches to innovation and digital technologies and their impact on organisations, and how their application can forge organisational improvement / development.

5.2 Innovation and digital technology’s impact on data and knowledge management for analysing business decision-making.

5.3 Identify service/ organisational improvements and opportunities for innovation and growth, using qualitative and quantitative analysis of information and data and benchmarking against others.

### Skills – be able to:

5.1 Identify service/ organisational improvements and opportunities for innovation and growth, using qualitative and quantitative analysis of information and data and benchmarking against others.

### Learning outcome/ outcome

**Assessment criteria** The candidate can:

**Module** Evidenced by:

| 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. | ISS271 | Assignment, Reflective Essay, Presentation, 360 documents, Learning log, Employer, Other |
| ISS271 Digital Business and New Technology | |

**Knowledge – know and understand:**

6.1 Different forms of communication (written, verbal, non-verbal, digital) and how to apply them.

6.2 How to maintain personal presence and present to large groups.

6.3 Interpersonal skills awareness including effective listening, influencing techniques, negotiating and persuasion.

**Skills – be able to:**

6.4 Communicate clearly, effectively and regularly using oral, written and digital channels and platforms.

6.5 Use active listening and open questioning to structure conversations and discussions, and able to challenge when appropriate.

6.6 Manage and chair meetings and clearly present actions and outcomes.

6.7 Apply influencing and persuading skills, to the dynamics and politics of personal interactions.
Interpersonal Excellence – leading people and developing collaborative relationships

<table>
<thead>
<tr>
<th>Learning outcome/outcome required</th>
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<tr>
<td>7. Leading People Knowledge</td>
<td>Knowledge – know and understand:</td>
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<tr>
<td>7.1 Different inclusive leadership styles and models, how to develop teams and support people using coaching and mentoring approaches.</td>
<td>Portfolio will include evidence obtained using 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.</td>
<td>IS6134</td>
<td>Emotional Intelligence</td>
<td>Assignment, Reflective Essay</td>
<td>IS6118</td>
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<tr>
<td>7.2 Organisational culture and diversity management:</td>
<td>Interview will test knowledge and understanding of leadership and organisational culture, and how this can be used to affect performance.</td>
<td>IS6118</td>
<td>Interpersonal Excellence</td>
<td>Interview</td>
<td>IS6118</td>
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<tr>
<td>Skills – be able to:</td>
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<tr>
<td>7.1 Understand organisational purpose and values:</td>
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<tr>
<td>7.2 Explain diversity management and review approach in own organisation (IS4133, IS6118, IS6118, NELMS)</td>
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<td>7.3 Support the creation of an inclusive, high performance work culture:</td>
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<tr>
<td>7.4 Take actions that support the creation of an inclusive work culture (IS4133, IS6118)</td>
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<td>7.5 Enable others to achieve by developing and supporting them through coaching and mentoring</td>
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<tr>
<td>7.5.1 Enable others to achieve by developing and supporting them through coaching and mentoring (IS6118)</td>
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Interpersonal Excellence – leading people and developing collaborative relationships

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<tr>
<th>Learning outcome/outcome required</th>
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<th>PAT</th>
<th>Date added to portfolio</th>
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<tbody>
<tr>
<td>8. Managing People Knowledge</td>
<td>Knowledge – know and understand:</td>
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<tr>
<td>8.1 How to recruit, manage and develop people, using inclusive talent management approaches.</td>
<td>Portfolio will include evidence obtained using range of assessment methods that the candidate has understood and can apply inclusive approaches to recruitment and management to meet organisational needs.</td>
<td>IS6185</td>
<td>Managing People</td>
<td>Assignment, Reflective Essay</td>
<td>IS6118</td>
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<tr>
<td>8.2 How to use HR systems and processes to ensure legal requirements, health and safety, and well-being needs are met (IS4133, IS6118)</td>
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<td>8.3 How to set goals and manage performance.</td>
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<tr>
<td>8.3.1 Critically evaluate goal setting theories and models (IS4133)</td>
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<td>8.3.2 Set realistic achievable goals (IS4133)</td>
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<td>8.3.3 Develop skills to significantly improve performance or achieve outcomes.</td>
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<td>Skills – be able to:</td>
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<td>8.4 Build teams, empower and motivate others to improve performance or achieve outcomes.</td>
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<tr>
<td>8.4.1 Demonstrate successful team building skills to significantly empower and motivate others (IS4133, IS6118, IS6124)</td>
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<td>8.5 Delegate to others, provide clear guidance and monitor progress.</td>
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<tr>
<td>8.5.1 Identify and delegate tasks to others, demonstrating the provision of clear guidance and the effective monitoring of progress to achieve positive results (IS6133, IS6118, IS6124, NELMS)</td>
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<tr>
<td>8.6 Set goals and accountabilities.</td>
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<tr>
<td>8.6.1 Set realistic goals for others and ensure accountability (IS4133, IS6124)</td>
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</table>
### Interpersonal Excellence – leading people and developing collaborative relationships

**Learning outcome/ outcome required: The candidate will:**

**Assessment criteria**

1. **Describe the principles of stakeholder, customer and supplier engagement and management.**
2. **Analyse stakeholder, customer and supplier engagement and management in own organisation and identify strategies for improvement.**
3. **Explain the benefits and challenges of cross-functional working and apply this method of working to deliver positive results.**
4. **Build rapport and trust, maintaining relationships as appropriate.**
5. **Demonstrate useful contributions to a team environment.**

**Assessment methods**

- Portfolio: Will include evidence obtained using a range of assessment methods to show that the candidate has understood collaborative relationships and has put these into practice.
- Interview: Will test knowledge and understanding of developing and sustaining collaborative relationships.
- IS5512 Transition and Change Management
- IS618 Managing and Leading People
- IS6134 Delivering Results
- IS6134 Emotional Intelligence
- IS5517
- NELMS

**Evidenced by:**

- Assignment: Reflective Essay
- Presentation: 360 documents
- Learning log
- Employer
- Other

**Portfolio**

- IS5512 Transition and Change Management
- IS618 Managing and Leading People
- IS6134 Delivering Results
- IS6134 Emotional Intelligence
- IS5517
- NELMS

**Date added to portfolio**

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### Personal Effectiveness and Managing Self

**Learning outcome/ outcome required: The candidate will:**

**Assessment criteria**

1. **Evaluate theories of learning styles and apply to self and others.**
2. **Evaluate models of emotional intelligence and their use in the workplace.**
3. **Evaluate the importance of active listening and open questioning and demonstrate their uses in working with others.**

**Assessment methods**

- 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.
- Interview: Will test the candidate’s self-awareness, impact upon others, and strategies for development of self.

**Evidenced by:**

- IS4001 Self Review
- IS6134 Emotional Intelligence
- IS4001
- IS5017
- IS6134
- NELMS

**Portfolio**

- IS4001 Self Review
- IS6134 Emotional Intelligence
- IS4001
- IS5017
- IS6134
- NELMS

**Date added to portfolio**

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**Skills – be able to:**

1. **Reflect on own performance, identifying and acting on learning and development needs.**
2. **Devise and implement strategies for addressing learning and development needs.**
3. **Understand impact on others.**
4. **Manage stress and personal well-being, being confident in knowing core values and drivers.**

**Knowledge – know and understand:**

1. **Knowledge of core values and their uses in the workplace.**
2. **Understanding of active listening and open questioning and their uses in working with others.**

**Knowledge – be able to:**

- IS5512 Transition and Change Management
- IS618 Managing and Leading People
- IS6134 Delivering Results
- IS6134 Emotional Intelligence
- IS5517
- NELMS

**Portfolio**

- IS5512 Transition and Change Management
- IS618 Managing and Leading People
- IS6134 Delivering Results
- IS6134 Emotional Intelligence
- IS5517
- NELMS

**Date added to portfolio**

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**Interpersonal Excellence – leading people and developing collaborative relationships**

**Module Evidenced by:**

- PAT

**Personal Effectiveness and Managing Self**

**Module Evidenced by:**

- IS4001, IS6134, NELMS

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**Individual Portfolio of Evidence Checklist**

**Learning log**

1. **Employer**
2. **360 documents**
3. **Presentation**
4. **Refl ective Essay**
5. **Assignment**
6. **Portfolio**
7. **IS4001**
8. **IS6134**
9. **NELMS**

**Date added to portfolio**

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Learning outcome/ outcome required The candidate can:

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<tbody>
<tr>
<td>Takes responsibility</td>
<td>Interview</td>
<td>Self Review</td>
<td>IS4001, NELMS</td>
<td>360 documents</td>
</tr>
<tr>
<td>• Drive to achieve in all aspects of work</td>
<td>Interview</td>
<td>Self Review</td>
<td>IS4001, NELMS</td>
<td>360 documents</td>
</tr>
<tr>
<td>• Demonstrates resilience and determination when managing difficult situations</td>
<td>Interview</td>
<td>Self Review</td>
<td>IS4001, NELMS</td>
<td>360 documents</td>
</tr>
<tr>
<td>• Seeks new opportunities, underpinned by commercial acumen and sound judgement</td>
<td>Interview</td>
<td>Self Review</td>
<td>IS4001, NELMS</td>
<td>360 documents</td>
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Agility

| Flexible to the needs of the organisation | Interview | Reflection Essay | IS4001, NELMS | 360 documents | Learning log | Employer | Other |
| • Is creative, innovative and enterprising when seeking solutions to business needs | Interview | Reflection Essay | IS4001, NELMS | 360 documents | Learning log | Employer | Other |
| • Positive and adaptable, responding well to feedback and need for change | Interview | Reflection Essay | IS4001, NELMS | 360 documents | Learning log | Employer | Other |
| • Open to new ways of working and new management theories | Interview | Reflection Essay | IS4001, NELMS | 360 documents | Learning log | Employer | Other |

Professionalism

| Behaves in an open, honest and trustworthy manner | Interview | Reflection Essay | IS4001, NELMS | 360 documents | Learning log | Employer | Other |
| • Sets an example, and is ethical, fair, consistent and impartial | Interview | Reflection Essay | IS4001, NELMS | 360 documents | Learning log | Employer | Other |
| • Operates within organisational codes and policies (e.g. code of conduct and practice) | Interview | Reflection Essay | IS4001, NELMS | 360 documents | Learning log | Employer | Other |

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.

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Inclusive

| Create a positive impact on society | Interview | Self Review | IS4001, NELMS | 360 documents | Learning log | Employer | Other |
| • Open, approachable, authentic and able to build trust with others | Interview | Self Review | IS4001, NELMS | 360 documents | Learning log | Employer | Other |
| • Seeks the views of others and values diversity internally and externally | Interview | Self Review | IS4001, NELMS | 360 documents | Learning log | Employer | Other |

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Please direct all your general enquiries to this email address: CWRSapprenticeships@chester.ac.uk

All correspondence will be directed to the most appropriate member of the team and answered as promptly as possible.

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