End-Point Assessment Plan

Museum and Gallery Technician – LEVEL 3

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1. Introduction

The Museum and Gallery Technician Apprenticeship standard has been designed to operate as the professional standard for people working as Museum and Gallery Technicians at Level 3 across the sector.

The assessment plan is to accompany the standard and will ensure that the completion of a Museum and Gallery Technician Apprenticeship meets the requirements of the standard in terms of Knowledge, Skills and Behaviours.

On completion of the Apprenticeship, the individual will be recognised as competent to perform in the role of a Museum and Gallery Technician across the sector. This will be achieved by passing the End-Point Assessment.

This plan outlines the End-Point Assessment that apprentices must successfully complete to achieve their apprenticeship.

Where 'objects' are referenced in this plan, they may mean art, ceramic, paintings, archaeological material etc as appropriate to the context of the apprentice's environment.

2. Summary of Assessment

The following table outlines the suggested key elements of the on-programme journey; what evidence is required in order that the apprentice can be entered in to the EPA process and the assessment methods that form part of the EPA. The total duration of the apprenticeship is typically 15 - 21 months. The apprenticeship on-programme journey will typically be a minimum of 15 months. All on-programme requirements must be completed prior to the end-point assessment taking place. The end-point assessment period is 3 months.
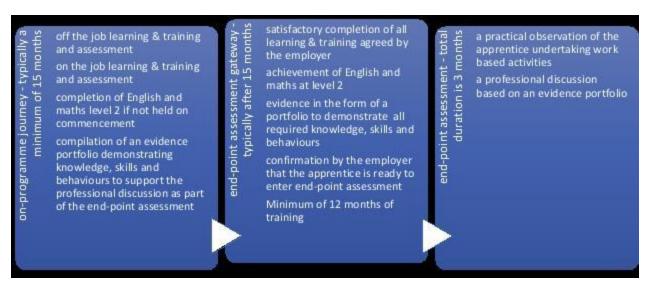
on-programme journey - typically a minimum of 15 months	end-point assessment gateway - typically after 15 months	end-point assessment - total duration is 3 months
off the job learning & training and assessment on the job learning & training and assessment completion of English and maths level 2 if not held on commencement compilation of an evidence portfolio demonstrating knowledge, skills and behaviours to support the professional discussion as part of the end-point assessment	satisfactory completion of all learning & training agreed by the employer achievement of English and maths at level 2 evidence in the form of a portfolio to demonstrate all required knowledge, skills and behaviours confirmation by the employer that the apprentice is ready to enter end-point assessment Minimum of 12 months of training	a practical observation of the apprentice undertaking work based activities a professional discussion based on an evidence portfolio

Table 1 Apprenticeship Elements

3. On-Programme Journey

Apprentices must follow an agreed learning and training programme that supports their acquisition of the knowledge, skills and behaviours as defined in the standard. The off the job element of this learning and training must be at least 20% of their apprenticeship duration.

It is suggested that regular reviews of the apprentice's progress are held. Typically, these are led by the employer and, where appropriate, supported by the training provider.

Formal off the job training, a minimum of 20% of the duration of the apprenticeship, is usually provided by a training provider. Employers and training providers must ensure that the apprentice is able to demonstrate the appropriate knowledge, skills and behaviours as agreed as part of the training plan. Employers must provide the opportunity for the apprentice to practise the learning in the work place i.e. on the job training.

Prior to entering end-point assessment, the apprentice must develop a portfolio of evidence. This evidence, which can be electronic, should contain written/recorded summary accounts of all activities that have been completed and referenced against the knowledge, skills and behaviours assigned to the professional discussion, as expanded in appendix A. These will typically cover:

- Health, safety and security
- Loaning of objects
- Documentation of objects

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- Appropriate processes, collections and exhibitions care
- Mission, values and purpose
- Equality and diversity – the organisation
- Collections care and the safe management, storage and display of objects
- Risk assessment and reporting
- Delivering against curatorial specifications
- Management of technical resources
- Problem solving
- Communication
- Working Relationships
- Equality and Diversity – personal behaviour
- Attention to detail
- Positive attitude
- Drive and passion
- Sustainability and Environmental Impact

The brief written/recorded accounts should be supported, where appropriate, by relevant photographic/video evidence and/or physical evidence where size/transportability is appropriate and the evidence is not part of a current display, in-house training certificates, examples of other work produced, witness testimonies, work-based communications e.g. emails to give context to evidence. Progress review documentation should also be included. To support the synoptic assessment, evidence can be referenced against more than one knowledge, skill or behavioural requirement.

The portfolio should typically contain between 15 and 20 pieces of evidence. This evidence will demonstrate how the apprentice meets the knowledge, skills and behaviours identified in appendix A. The portfolio is retained by the apprentice and brought by them to the professional discussion. It is used as a vehicle through the discussion for the apprentice to bring to life their knowledge, skills and behaviour as required during questioning by the Independent Assessor. The portfolio is not marked as part of the assessment process.

4. End-Point Assessment Gateway

The Employer will decide when the apprentice is ready to enter the EPA process, this will typically be after 15 months of training, learning and development and when all EPA gateway criteria are achieved. The employer may consult with the training provider to help make this decision but the employer must take sole responsibility for that decision.

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Apprentices should not be entered into the EPA process until they are ready and as a minimum have:

- completed satisfactorily all learning and training as agreed between the employer and training provider
- a portfolio to demonstrate knowledge, skills and behaviours to support the professional discussion as part of the end-point assessment
- achieved level 2 or equivalent or higher in English and maths, if these were not attained prior to entry on to the apprenticeship
- got the employer's support to enter the end-point process
- had a minimum of 12 months of training

All end-point assessment gateway criteria must be achieved.

5. End-Point Assessment

5.1 End-Point Assessment Overview

The EPA process will take place during the final 3 months of the apprenticeship and consists of 2 assessment methods: a practical observation and a professional discussion based on the apprentice's evidence portfolio developed towards the end of the on-programme journey. The order of the assessment methods will be agreed with the employer and the end-point assessment organisation (EPAO).

The following is a summary table of the assessment methods, what is to be assessed, who will undertake the assessment, what grading will be applied to each method and weighting of the assessment method:

Assessment Method and Weighting	Areas Assessed	Assessed by	Grading
Practical observation 50% weighting	See appendix A – practical observation (PO)	End-point assessment organisation	Fail or pass
Professional discussion 50% weighting	See appendix A – professional discussion (PD)	End-point assessment organisation	Fail, pass or distinction

Table 1 End-Point Assessment Overview

5.2 Roles and Responsibilities

The following describes who is involved in the preparation for and undertaking end-point assessment:

Title	Criteria	Role
Employer	Directly employs the apprentice	The employer will support the apprentice throughout the apprenticeship helping them to reflect on their performance. They will ensure the apprentice prepares and collates the necessary evidence to demonstrate competence against the requirements of the apprenticeship and keeps them in a portfolio. They will ensure the apprentice is prepared for the End-Point Assessment and will formally confirm to the EPAO that the apprentice is ready to pass through the gateway. The employer is also responsible for working with the EPAO to schedule the End-Point Assessment and ensuring any specific requirements for the End-Point Assessment have been agreed with the EPAO, as appropriate e.g. facilities, objects, resources etc.
Training Provider	Is contracted by the Employer to deliver the off-the-job training Is on the Register of Apprenticeship Training Providers	The training provider develops on-programme training programmes that meet and deliver the knowledge, skills and behaviour requirements as defined by the standard. They review the apprentice's development and provide feedback to the apprentice and employer throughout the training, as appropriate. Other than provide information to the employer about the apprentice's readiness for end-point assessment upon request, the training provider has no involvement in the EPA.
Independent Assessor	• Appointed by the EPAO	To assess the practical observation and professional discussion

	Is engaged in the Sector and is working or has worked in a Museum and Gallery Technician environment at a senior level in the last 12 months. • Has management experience. • Holds an Assessor qualification. • Is not employed by the apprentice's employer or the training provider who has worked with the apprentice, i.e has no conflict of interest	Makes recommendations to the EPAO regarding final grade outcomes
End-Point Assessment Organisation	End-point assessment organisations (EPAO) must be registered on the Register of End-Point Assessment Organisations (RoEPAO) held by the Education and Skills Funding Agency (ESFA).	• provide EPA guidance to apprentices, employers and training providers in relation to the requirements of the professional discussion/evidence portfolio and project. • develop assessment tools and documentation in consultation with representative employers. • provide guidance in relation to the EPA i.e. making reasonable adjustment, eligibility to enter EPA and conflict of interest. • develop compensatory assessment for learners with special requirements known by the employer at the time of entering into end-point assessment, to allow reasonable adjustments to be made to assess the knowledge, skills and behaviours of the apprentice through alternative assessment techniques. They must be designed to maintain the

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		integrity of the end-point assessments and ensure judgements are not compromised.
		
		• appoint and approve independent assessors to conduct the EPA marking and grading, based on a check of knowledge and experience.
		
		• provide training for independent assessors:
		   - in terms of the requirements of the operation and marking of the EPA tools and initial grading.
		   - in undertaking fair and impartial assessment and making judgements about performance and the application of knowledge, skills and behaviours within a workplace setting.
		   - hold bi-annual standardisation events for independent assessors to ensure consistent application of the guidance
		
		• ensure that there is consistency and comparability in terms of the breadth and depth of each assessment, to ensure assessments are reliable, robust and valid
		
		• consider evidence in relation to reasons for failing an EPA and confirm whether a grade higher than pass will be allowed for a re-take/re-sit, where the learner may have failed due to circumstances beyond their control.
		
		• ensure assessment organisation moderation staff are trained in assessment and assurance processes and undertake regular continuing professional development.

Table 2 Roles and Responsibilities

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5.3   Assessment Methods

The practical observation and professional discussion will most likely take place on the same day. Where there is more than one apprentice being assessed effective use of time may mean that all observations take place on one day and professional discussions on the following day. Marking should be undertaken as soon as practicable and the preliminary marks forwarded to the EPAO. The practical observation should take place in a realistic work environment. Ideally, this should be the apprentice's workplace, if this is not feasible, the EPAO is responsible for ensuring that the venue is representative of the workplace and can facilitate the EPA.

It is expected that the same Independent Assessor will undertake both assessment methods for an individual apprentice.

5.3.1   Practical Observation

The practical observation is an opportunity for the apprentice to demonstrate and apply the knowledge, skills and behaviours (as identified in appendix A) to two different objects. Throughout the observation, the apprentice will safely and competently demonstrate their knowledge, skills and behaviours whilst working with the objects.

This is an individual observation and will be completed in one session. It will take place in a realistic work environment which may or may not be the employer's premises. The actual location will be agreed with the employer and EPAO. It will take 2.5 hours +/- 10%. Natural short breaks are allowed if required. These are not included in the total time allowed.

In order to demonstrate competence across a breadth of objects, the practical observation will use two different objects chosen from a list of suitable objects and resources provided by the EPAO. The choice of objects needs to recognise the context and operation of the apprentice's organisation. The specification for the actual objects will be provided to the employer at least 3 weeks prior to practical observation. The observation will include the following activities:

1. Health and safety, security and environmental procedures and processes to support the activity
2. The installation of the both objects using correct equipment and building any mounts, supports or cases' as necessary
3. The deinstallation and wrapping of both objects and associated items securely for transport.
4. At the end of the observation, returning the work space to a tidy state after the activity in accordance with the organisation's and associated parties (where applicable) policies and procedures

5. Confirming completion of the activities in accordance with the organisation's policies and procedures

Activities 1, 2, and 3 should be observed for each object. Activities 4 and 5 should be observed on at least one occasion during the observation.

At the end of the practical observation if the Independent Assessor identifies any areas that did not naturally occur/arise they will ask questions. This will allow them to gain greater clarity of the apprentice's knowledge, skills and behaviours around the tasks. These questions should be styled to allow the apprentice to demonstrate their occupational competence through discussion, e.g using scenario-based questions.

The actual questions, if required, may be written by the assessor pertinent to the observation. The answers should be recorded on paperwork provided by the EPAO. Where the apprentice naturally achieves all pass criteria, no questions will be required.

The Independent Assessor will mark the practical observation and record an outcome on EPAO documentation, prior to forwarding the documentation to the EPAO.

5.3.2   Professional Discussion

The professional discussion is an opportunity for the apprentice to demonstrate through evidence in their portfolio and answering oral questions the knowledge, skills and behaviours as identified in appendix A.

The professional discussion is based on the showcase portfolio which the apprentice has developed towards the end of the on-programme journey. It is split into 2 equal parts and there will be a short break between the 2 parts, if required.

This professional discussion will be undertaken by the same independent assessor who has assessed the practical observation and will take place in an appropriate place with no interruptions. Appropriate equipment to allow the apprentice to show their evidence eg display screen, flip chart should also be provided.

The professional discussions will be undertaken under controlled conditions and will be in two equal parts. Each part will last for 90 minutes (+/- 10% at the assessor's discretion). They will both consist of a maximum of 9 topic areas i.e. one for each of the elements identified below. Each topic area will have a question developed by the EPAO. The discussion per topic area will typically last for 10 minutes, some will be less depending on the answers given and this time will include any follow-up questions that may be required. It is appreciated that the Independent Assessor may not use each question for each topic area as the apprentice may

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have demonstrated knowledge, skills and behaviours whilst discussing other topics eg health and safety.

EPAOs must develop 'question banks' to support the Independent Assessor to discuss the topic areas in a fair and standardised way, accommodating learner needs.

The first part will cover the following elements

- Health, safety and security
- Risk assessment and reporting
- Collections care and the safe management, storage and display of objects
- Loaning of objects
- Appropriate processes, collections and exhibitions care
- Documentation of objects
- Delivering against curatorial specifications
- Problem solving
- Management of technical resources

The second part will cover the following elements:

- Mission, values and purpose
- Equality and diversity – the organisation
- Communication
- Equality and Diversity – personal behaviour
- Working Relationships
- Attention to detail
- Positive attitude
- Drive and passion
- Sustainability and Environmental Impact

These headings are further expanded in the standard and appendix A. All elements should be covered.

The Independent Assessor will use standardised questions from an agreed set of questions developed by the EPAO. EPAOs must develop 'question banks' of sufficient size to prevent predictability and review them regularly (and at least once a year) to ensure they, and the

questions, are fit for purpose. Actual questions used will be provided by the EPAO on a randomised basis. Questions will be moderated by each EPAO. The EPAO will also provide a template to record apprentice responses.

The Independent Assessor will provide one overall recommended grade outcome for the professional discussion in-line with grading criteria contained in table 3. The EPAO will provide a template document for the Independent Assessor to record their grade recommendation. A recommended grade will be forwarded to the EPAO.

5.4   Re-takes/Re-sits

Apprentices who fail one or more assessment method will be offered the opportunity to take a re-sit or a re-take. A re-sit does not require further learning, whereas a re-take does.

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

An apprentice who fails an assessment method, and therefore the EPA in the first instance, will be required to re-sit/re-take any failed assessment methods only.

Any assessment method re-sit or re-take must be taken during the maximum EPA period, otherwise the entire EPA must be taken again, unless in the opinion of the EPAO exceptional circumstances apply outside the control of the apprentice or their employer.

Re-sits and re-takes are not offered to apprentices wishing to move from pass to distinction.

Where any assessment method has to be re-sat or re-taken, the apprentice will be awarded a maximum EPA grade of pass, unless the EPAO determines there are exceptional circumstances requiring a re-sit or re-take.

6.   Grading

6.1   End-Point Assessment Grading

This apprenticeship includes fail, pass and distinction grades.

To achieve a pass grade apprentices will safely and competently perform their role demonstrating application of the knowledge, skills and behaviours against the whole standard ie achieve a pass grade in both assessment methods. The apprentice has to achieve all pass criteria as detailed in appendix B.

A distinction grade is only available in the professional discussion assessment. To achieve a distinction grade all pass criteria need to be achieved, prior to achieving all the distinction criteria in appendix B.

A fail grade will be awarded where the apprentice fails to meet all pass criteria in either assessment method.

7.   Final Grade

The final grade decision, subject to standardisation and moderation, is made by the EPAO using the grading criteria in Appendix B. It is recorded on standard EPAO documentation.

8.   Quality Assurance

8.1   Internal Quality Assurance

The EPAO is responsible for all internal quality assurance processes including responsibility for all assessment decisions, grading of apprenticeships and standardising the judgements of Independent Assessors. The following describes internal quality assurance processes:

8.1.1   Assessment Moderation

EPAOs will undertake moderation of independent assessors' decisions. This will be done through observations and examination of documentation on a risk sampling basis. New assessors will be subject to 100% audit until they have completed 10 assessments without inconsistencies. Subsequent sampling will be 20% per annum unless inconsistencies are identified, in which case they will return to 100% for the following 5 assessments.

8.2   External Quality Assurance

External quality assurance (EQA) for this apprenticeship standard will be managed by The Institute for Apprenticeships.

9.   Implementation

9.1   Intake

It is expected that there will be approximately 10 new starts in the first year and 25 per annum in subsequent years.

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9.2   Affordability

This approach to independent assessment has been tested with employers who have confirmed that it is the preferred approach. Cost analysis verified that this approach was the most cost-effective method of all.

9.3   Manageability and Feasibility

The end point assessment has been designed to meet the needs of all employers and all environments across the sector where Museums and Galleries Technicians are employed.

We envisage that one independent assessor will be able to undertake all assessment activities for one apprentice ideally in one day or an aggregate of 1 day. The independent assessor resource requirements, when the apprenticeship is fully established within the sector, is expected to be in the region of 25 days per year. The approach is expected to be manageable and feasible as the necessary expertise already exists within the sector. It would be expected that end-point assessment organisations tap into employer organisations when recruiting for independent assessors. Utilising existing expertise would ensure a sufficiency of qualified assessors with a good geographical spread.

9.4   Consistency

The responsibility for the robustness of the assessment process is held by the End-Point Assessment Organisation. This ensures that there is consistency of decisions, true independence, impartiality, validity and reliability in the assessment.

The assessment methods described previously are designed to produce assessment outcomes that are consistent and reliable, allowing fair and proper comparison between apprentices employed in different types and sizes of organisations. At the core of this will be the set of assessment tools that are used by all assessors and to inform the training that assessors receive. The End-point Assessment Organisation will, create the tools and materials to be used in the end-point assessment based on this Plan. It is recommended that the EPAO consults with employers when developing the assessment tools, ensuring that measures have been put in place to maintain the security and confidentiality of these tools. Particular attention will be paid to ensuring that the tools are consistent and produce valid and reliable results. The End-point Assessment Organisation will thereafter be responsible for monitoring the work of the individual assessors to ensure continuing robustness – independence, consistency, accuracy.

The End-point Assessment Organisation will provide robust validation and quality assurance processes to ensure that all assessments are robust, that they assess fully against the Standard, are undertaken consistently and to the same standard and that the individuals carrying out the assessment have the requisite skills and industry experience. These will be developed as part of

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the Assessment Tools to ensure that they are consistent across all apprentices. Immediate and appropriate action will be taken where any quality concerns are identified.

Appendix A - Assessment Methods

PD	Professional discussion
PO	Practical observation

Knowledge		Assessment Method
Health, safety and security	K1. The security issues facing museums and galleries including access	PD
	K2. Health and Safety issues specific to the safe display, storage and movement of objects and those who may come into contact with them. This may include lifting and handling, protective equipment and clothing, and working at height	
	K3. The role of the organisation's disaster and emergency response systems and associated policies and procedures where applicable e.g. fire, flood, pest outbreak, theft, vandalism and accidental damage, and the role each relevant member of staff plays within this including the Technician's	
	K4. Specific threats and associated security in relation to the organisation	
	K5. How to recognise and identify risks within spaces that technicians work	PO & PD
	K6. Good practice and full compliance with health and safety regulations eg COSHH, RIDDOR and the organisation's associated policies and procedures	
Loaning of objects	K7. The documentation associated with the entry and exit of objects, such as works on loan, acquisitions or objects left for identification by the public	PD
	K8. The Government Indemnity Scheme and/or other appropriate insurer conditions	

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	K9.	Guidelines for transporting objects of varying conditions to different locations using a range of different transportation methods which may include courier requirements for loans and touring exhibitions	
Documentation of objects	K10.	The organisation's and lender's (where appropriate) conditions of loan and the need for compliance with these. Where an organisation doesn't loan objects, show understanding in recommended principles of loan conditions such as those set out by the Museum Association	PD

Design	K11.	The most appropriate materials for use to support specific displays, storage and in-transit design	PO
	K12.	The most appropriate equipment and tools to use when making display, storage and packing solutions	
Appropriate processes, collections and exhibitions care	K13.	Curatorial and/or conservation instructions (method statements) to know how to successfully deliver agreed tasks or projects	PO
	K14.	Environmental and human impacts on objects to ensure their long term preservation and safe keeping	PD
	K15.	The principles behind the care of objects, showing awareness of and ability to make sound judgements about their care	
	K16.	Recognise and report risks as per company procedures, and create/interpret data relating to the storage and movement of objects in line with industry standards and/or respective company standards as appropriate	
	K17.	The risk factors and vulnerabilities of objects, their materials and construction to inform and plan for appropriate technical work associated with the sound storage, movement and display of objects including manual handling techniques, installation, and types of transportation to prevent object damage/decay	
	K18.	The range of materials for packing and storage and the appropriate application of these	
	K19.	Impact of sound cataloguing practices and risks associated with data errors	
	K20.	Environmental impact on objects including pest management, humidity, temperature, light levels including UV, environmental pollution	
	K21.	Know who to report risks to as a result of environmental and human impacts for example	
	K22.	Budget implications and constraints	
	K23.	The mission, values and objectives of your organisation and the context within which it operates (e.g. public/private facing, financial model, audiences and customers)	PD

Mission, values and purpose	K24.	How to work with third parties and the importance of upholding their standards, and the importance of them upholding yours [the organisation's]	
	K25.	The importance of audiences and their make-up and their impact on your organisation	
	K26.	The organisation's code of ethics and approaches to sustainable practices	
	K27.	Identify the types of Museums and Galleries across the UK and the economic and social conditions within which these operate	
Equality and diversity	K28.	The organisation's strategies for widening access, inclusion and diversity, where applicable and how to support them	PD

Skills			Assessment methods
Collections care and the safe management, storage and display of objects	S1.	Contribute to the design, modify, prepare and build containers, fixings and packing for the safe storage and transit of objects, and justify the selection and use of materials for this, based on the specifications of the objects	PO
	S2.	Undertake safe handling, movement and installation of objects taking into account location, fragility, weight, size and other hazards	
	S3.	Ensure the safe use, appropriate selection and application of hand/machine tools and equipment relevant to objects specifications and their value. This may include fixed and hand-held equipment, ladders, scaffolding and band saws.	
	S4.	Keep storage areas and associated work spaces clean and tidy in line with the organisation's and associated parties (where applicable) policies and procedures	

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	S5. Carry out planned reviews and improvements to storage and display areas.	PD
	S6. Review, repair, reline and adapt showcases.	
	S7. Assist with the identification of faults and appropriate maintenance of equipment and machinery used in technicians work in accordance with the organisation's policies and procedures such as ladders, scaffolding, hand tools, trolleys, band saws, laser cutters and any hot metal equipment for making mounts for objects.	
	S8. Move, or oversee the safe movement of, objects for photography, collections care, loans and/or changes to displays demonstrating special awareness at all times.	PO
	S9. Identify and minimise any pest or environmental related risks to objects in the organisation's care	PO
	S10. Assist with collections and object care procedures including examination, treatment and full documentation on a wide range of objects.	PD
Risk assessment and reporting	S11. Undertake risk assessments either manually or electronically, in-line with company process, to ensure safe working practices for staff and public	PO
	S12. Ensure all completed risk assessments are effectively communicated with relevant parties	
	S13. Liaise with relevant staff to ensure that objects databases are accurately maintained and updated	PD
	S14. Document and report information about the condition of objects as per the organisation's policies and procedures including photographing objects to maintain visual records and aid accurate record keeping.	
	S15. Assist relevant staff with the writing of condition and treatment reports for objects and advise on suitable storage	
Delivering against	S16. Prepare the relevant space for object installation and de-installation in line with agreed plans e.g. plinth manufacture, false wall building, artist commissions	PO

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curatorial specifications	S17.	Offer advice and guidance about appropriate display, storage and environmental controls for objects for internal or external stakeholders	PD
Management of technical resources	S18.	Research and source materials, tools, equipment and supplies needed to make displays, mounts, cases and commissions	PD
	S19.	Where appropriate order these in line with the organisation's purchasing procedures and budget constraints of the task, to deliver technical designs and store objects	
	S20.	Complete documentation associated with sourcing and managing materials in-line with company standards	
Problem solving	S21.	Identify unexpected challenges such as changes in environmental and biological conditions, deviation from the specifications and operational restrictions	PD
	S22.	Offer and implement appropriate solutions to the identified challenge or seek appropriate guidance	
Communication	S23.	Write, speak and present information clearly	PD
	S24.	Complete required documentation in-line with company standards	
	S25.	Explain complex issues and difficult decisions in a way that is easy to understand to a range of audiences adapting methods of communication as appropriate for the audience	
Working Relationships	S26.	Work as part of a team, and cross-departmentally, sharing responsibilities as appropriate	PD
	S27.	Undertake all tasks within agreed timeframes and budgets and in line with curatorial and/or collections care requirements, reporting progress as appropriate	
	S28.	Work independently on a range of agreed tasks	

Behaviours	Methods

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Equality and Diversity	B1.	Promotes equality and diversity by developing and maintaining positive working relationships and best practice by treating all colleagues, visitors and members of the public with respect, tolerance and dignity at all times	PD
	B2.	Listens to and respects others views and opinions, is diplomatic and tactful at all times	
Attention to detail	B3.	Rigorous, meticulous, accurate and confident in undertaking role tasks	PO
	B4.	Be pro-active and purposeful when working on activities, apply the appropriate knowledge and seek support when it is needed	PD
Positive attitude	B5.	Positive, cooperative, receptive and resilient at all times	PO & PD
	B6.	Prepared to work outside of one's comfort zone, to undertake different tasks	PD
	B7.	A willingness to learn, adapt and be trained in new skills and approaches, and share learning	
	B8.	Act as an Ambassador for the organisation at all times	
Drive and passion	B9.	Committed approach to problem solving	PD
	B10.	Clear enthusiasm and passion for learning about and working with the organisation's objects and stakeholders	
Sustainability and Environmental Impact	B11.	Work in a sustainable and environmentally friendly way in relation to the organisation's policies and procedures	PO & PD

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Practical Observation

Knowledge	Pass criteria
Health, Safety & Security	Demonstrates recognising and identifying risks in the spaces in the work area (K5)
	Demonstrates complying with appropriate health and safety regulations e.g. COSHH, RIDDOR and the organisation's associated policies and procedures (K6)
Design	Identifies the most appropriate material(s) from the range available, to complete the task and justifies their choice (K11)
	Identifies the most appropriate equipment and tools from the range available, to complete the task and justifies their choice (K12)
Appropriate processes, collections and exhibitions care	Works within curatorial and/or conservation instructions (method statements) in relation to the successful delivery of tasks/projects (K13)

Skills	Pass criteria
Collections care and the safe management,	Demonstrates contributing to the design/modification/preparation/building of containers, fixing and packaging for the safe storage and transit of objects, and justify the selection and use of materials for this, based on the specifications of the objects (S1)

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storage and display of objects	Selects and uses appropriate tools and equipment relevant to the objects' specification and value in order to handle, move/oversee the movement and installs the objects safely and appropriately taking into account location, fragility, weight, size and other hazards. This could include objects for photography, collections care, loans and/or changes to displays demonstrating special awareness at all times. (S2, S3 & S8)
	Takes responsibility for ensuring a tidy work space during and after the activity in accordance with the organisation's and associated parties (where applicable) policies and procedures (S4)
	Demonstrates identifying and minimising any pest or environmental related risks to objects used in the practical observation (S9)
Risk assessment and reporting	Produces a fit for purpose risk assessment in-line with company process to ensure safe working practices for staff and public and communicates it as appropriate (S11, S12)
Delivering against curatorial specifications	Prepares the relevant space for object installation and de-installation e.g. plinth manufacture, false wall building, artist commissions by interpreting agreed plans (S16)

Behaviours	Pass criteria
Attention to detail	Always displays care of objects, follows processes and tasks are accurately completed confidently (B3)
Positive attitude	Is positive, cooperative, receptive and resilient during the practical observation (B5)

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Sustainability and Environmental Impact	Works in accordance with appropriate environmental & sustainability policies and procedures (B11)

Professional Discussion

Knowledge	Pass criteria	Distinction criteria
Health, safety and security	Describes the typical security issues facing their organisation eg access and their role in minimising them (K1)	Explains mitigation actions taken by their organisation to prevent security issues happening
	Describes specific health and safety policies and procedures associated with their activities eg safe display, storage and movement of objects and those who may come into contact with them. This may include lifting and handling, protective equipment and clothing, and working at height (K2)	Explains the necessity for health & safety policies and procedures eg lifting and handling, protective equipment and clothing, and working at height and their application relevant to their activities and the consequences of not following those policies and procedures
	Explains appropriate disaster and emergency response systems and associated procedures appropriate for their activities e.g. fire, flood, pest outbreak, theft, vandalism and accidental damage (K3)	Explains why these systems and procedures e.g. fire, flood, pest outbreak, theft, vandalism and accidental damage, are required and the consequences of not adhering to those systems and procedures
	Knows how to identify key threats and associated security issues (K4)	Explains how their organisation mitigates the specific threats and associated security and the consequences of not putting those measures in place
	Describes how to recognise and identify risks within spaces that they work (K5)	Explains the wider implications of risk in the work place

	Describes how to comply with appropriate health and safety regulations e.g. COSHH, RIDDOR and the organisation's policies and procedures (K6)	Explains why compliance with health and safety regulation e.g. COSHH, RIDDOR and associated organisation policies and procedures is important to themselves and the organisation and the consequences of non-compliance
Loaning of objects	Describes key documents associated with the entry and exit of objects e.g. works on loan, acquisitions or objects left for identification by the public (K7)	Explains the necessity of key documents associated with the entry and exit of objects e.g. works on loan, acquisitions or objects left for identification by the public and the consequences of not having them
	Describes the Government Indemnity Scheme and/or other insurer conditions appropriate to loaning objects (K8)	Explains the importance and relevance of the Government Indemnity Scheme and/or other insurer conditions
	Describes the object transportation options available to the organisation eg courier requirements for loans and touring exhibitions in relation to condition and location (K9)	Identifies the importance and relevance of transportation options depending on the situation and critically evaluates the effectiveness of each appropriate option
Documentation of objects	Describes the organisation's conditions of loan and the need for compliance Or Describes the Museum Association recommended principles of loan conditions and the need for compliance (K10)	Explains why it is important to have conditions of loan appropriate to the industry and the impact of not respecting those conditions
Appropriate processes, collections and exhibitions care	Describes the environmental and human impacts on the long-term preservation and safe keeping of objects and explains how their practice respects that (K14)	Explains the scientific processes that lead to the environmental and human impacts on the long-term preservation and safe keeping of objects and actions taken to minimise them
	Describes the different care requirements of a range of objects and materials using real-life examples from their portfolio (K15)	Explains appropriate links between conservation and the principles of caring for objects

Describes how they recognise and report risks in-line with company procedures (K16) Describes how they create and interpret data associated with storage and movement of objects in-line with company requirements (K16)	Explains the implications to the organisation and wider industry reputation of not identifying or recognising the risks associated with the storage and movement of objects
Describes the risk factors and vulnerabilities of objects, their materials and construction to inform and plan for appropriate technical work associated with the sound storage, movement and display of objects including manual handling techniques, installation, and types of transportation to prevent object damage/decay (K17)	Explains the impact on planning technical work of how a range of materials interact with each other
Describes the range of materials applicable to packing and storing objects (K18) Justifies the choices of materials they have made (K18)	Explains the potential impact of the use of a range of materials involved in packing and storing on the objects such as the use of acid-free tissue paper or plastazote for packing object
Describes cataloguing practices as required by the organisation and can describe the risks associated with data errors (K19)	Explains industry best practice and importance of standardised cataloguing practices e.g. Spectrum
Describes the range of environmental impacts on objects e.g. pest management, humidity, temperature, light levels including UV, environmental pollution (K20)	Explains processes to mitigate the environmental impacts on objects e.g. pest management, humidity, temperature, light levels including UV, environmental pollution and the long term/short term effects of those mitigations
Describes the reporting processes for risks in-line with organisation's policies and procedures (K21)	N/A

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	Describes the budget implications and constraints on their work activities (K22)	Explains identifying best use of money/value for money in their work activities
Mission, values and purpose	Describes the links between mission, values and objectives of the organisation and the impact of the context in which it operates on these (e.g. public/private facing, financial model, audiences and customers) (K23)	Relates personal activities to the organisation achieving its objectives
	Describes the importance of understanding third party objectives/standards and them upholding those of the organisation (K24)	Explains the mutual benefit of mutual understanding all parties objectives/standards
	Describes the importance of audiences and impact of audience diversity to the success of the organisation (K25)	Explains how they consider audiences and their make-up in the own role
	Describes the organisation's code of ethics and approaches to sustainable practices (K26)	Explains the impact and benefits of having a code of ethics and sustainable practices
	Describes a range of types of museums and galleries across the UK as well as explaining the economic and social conditions within which these operate (K27)	Explains the wider social and economic factors that impact their organisation and the wider museum and galleries sector
Equality and diversity	Describes the organisation's strategies for widening access, inclusion and diversity and explains their responsibilities in making them successful (K28)	Explains why the strategies are important and how they support them

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Skills	Pass criteria	Distinction criteria
Collections care and the safe management, storage and display of objects	Describes planned improvements made as a result of carrying out reviews to storage and display areas (S5)	Evaluates the storage and display areas review outputs to make recommendations for future, longer term improvements
	Demonstrates occasions of reviewing, repairing, relining and adapting showcases as required (S6)	Evaluates the reasons for review, repair, reline and adaptation of the showcases and the impact on the object of undertaking these activities.
	Demonstrates assisting with the identification of faults and appropriate maintenance of equipment and machinery used in technician's work eg ladders, scaffolding, hand tools, trolleys, band saws, laser cutters and any hot metal equipment for making mounts for objects in accordance with the Organisation's policies and procedures (S7)	Describes the wider implications of the appropriate maintenance of equipment and machinery
	Describes assisting with collections and object care procedures including examination, treatment and full documentation on a wide range of objects (S10)	Explains the wider implications of collections and object care procedures and gives examples of being proactive is assisting with the examination, treatment and/or documenting a wider range of objects
Risk assessment and reporting	Demonstrates liaising with relevant staff to make sure that the object database is up to date with the outcome of activities (S13)	Explains the wider impact of not making sure that the database is up to date
	Demonstrates accurately documenting and reporting the condition of the objects in line the organisation's policies and procedures including photographing objects to maintain visual records and aid accurate record keeping (S14)	Explains the wider impact of not accurately documenting and reporting the condition of the objects in line the organisation's policies and procedures

	Demonstrates assisting with the gathering of information for inclusion in condition and treatment reports for objects (S15)	Explains the implications and reasons for condition and treatment reports for objects and the wider implication of undertaking these activities
Delivering against curatorial specifications	Clearly describes offering advice and guidance about appropriate display, storage and environmental controls for objects to internal or external stakeholders (S17)	Clearly explains offering more detailed advice and guidance about appropriate display, storage and environmental controls for objects to internal or external stakeholder taking into account wider organisation implications
Management of technical resources	Demonstrates researching and sourcing appropriate materials, tools, equipment and supplies needed to make displays, mounts, cases and commissions in-line with organisation's policies and procedures (S18)	Justifies the recommendations for selecting materials, tools, equipment and supplies needed to make displays, mounts, cases
	Where appropriate, demonstrates ordering appropriate materials, tools, equipment and supplies needed to deliver technical designs and store objects in line with the organisation's purchasing procedures and budget constraints of the task (S19)	N/A
	Demonstrates timely completion of documentation associated with sourcing and managing materials in-line with company standards (S20)	Explains identifying improvements in the process of completing documentation associated with sourcing and managing materials and the benefits of those changes
Problem solving	Demonstrates identifying unexpected challenges such as changes in environmental and biological conditions, deviation from the specifications and operational restrictions that impact their activities (S21)	Explains anticipating typical unexpected challenges and actions taken to prevent/reduce their impact

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	Demonstrates offering and implementing appropriate solutions to the identified challenge when they are within their own area of responsibility or when to seek appropriate guidance from others (S22)	Explains evaluating solutions and effectively advising others on them whilst making sure the solutions are included in future plans
Communication	Demonstrates clearly writing, speaking and presenting appropriate information in relation to their role to others (S23)	Justifies the communication method(s) used to explain presenting information relative to their role to others
	Demonstrates accuracy in completing a wide range of documentation associated with their role in-line with company standards (S24)	N/A
	Describes when different communication methods have been used to communicate a difficult or complex decision in a way that is appropriate to the audience (S25)	Explains the selected method of communication and justifies its use in relation to the context of the issue and the requirements of the audience
Working Relationships	Demonstrates working as part of a team and appropriate cross-department working, sharing responsibilities to achieve objectives (S26)	Explains wider context of their activities within the organisation recognising opportunities for collaboration to achieve objectives
	Demonstrates meeting milestones and deadlines, working within budgets and providing regular progress reports in-line with curatorial and/or collections care requirements (S27)	Explains involvement in planning processes relative to curatorial and/or collections care requirements and pre-empting, identifying and informing others of variations required to ensure deliverables are achieved
	Demonstrates consistently achieving a range of appropriate tasks independently (S28)	Explains going above and beyond within roles parameters to achieve independent tasks more effectively/efficiently, e.g exceeds targets

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Behaviours	Pass criteria	Distinction criteria
Equality and Diversity	Proactively develops and maintains positive working relationships by treating others ie colleagues, visitors and members of the public with respect, tolerance and dignity (B1)	Explains the value of equality & diversity to the organisation and evidence of volunteering to support initiatives across the organisation/wider sector
	Takes others views into account and is diplomatic and tactful when dealing others (B2)	Uses active listening techniques and asserts own opinion in a diplomatic and tactful way
Attention to detail	Pro-actively applies appropriate knowledge and skills to achieve activities, knowing current limitations and when to seek support and the appropriate person(s) to ask (B4)	Uses support from others to enable them to implement appropriate solutions 'next time'.
Positive attitude	Is always positive, cooperative, receptive and resilient (B5)	Offers support to others to encourage them to be positive, cooperative, receptive and resilient at all times
	Willingly takes on different tasks, identifying support that may be required (B6)	Proactively identifies tasks to be involved in which support personal learning
	Willingly learns, adapts and seeks training in new skills and approaches and shares that learning with others (B7)	Proactively identifies and justifies new skills required and approaches to improve work activities
	Identifies how, in their day to day activities, they always act as an Ambassador for the organisation (B8)	Seeks opportunities to act as Ambassador for the organisation
Drive and passion	Acknowledges problems they have identified and the possible solution(s) they offered to resolve them (B9)	Reflects on lessons learnt from problems and identifies what they would do differently next time
	Willingly learns about the objects they are involved with and explains their learning to others (B10)	Readily describes learning about how to care for a range of objects out of interest not necessity

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Sustainability and Environmental Impact	Demonstrates undertaking work in-line with the organisation's sustainability and environmental policies and procedures (B11)	Explains why policies and procedures are required and the impact on the organisation of not following them

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