

END-POINT ASSESSMENT PLAN

Project Manager Level 6 Integrated Degree Apprenticeship

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Overview

This document sets out the requirements for the end-point assessment (EPA) of the Project Manager integrated degree apprenticeship standard. It will be of interest to apprentices, employers and End Point Assessment Organisations, who may be Higher Education Institutes (HEIs). This is an integrated degree apprenticeship. It incorporates on-programme academic and workplace learning and assessment with an independent end-point assessment to test the knowledge, skills and behaviours of the standard. It will typically take 4 years to complete, with the EPA taken in the last 6 months. Awarding HEIs will be responsible for the on-programme and EPA requirements. They must be on the Education & Skills Funding Agency (ESFA) Register of Apprenticeship Training Providers. In addition, they must be approved to offer the EPA for this standard and be on the ESFA Register of End Point Assessment Organisations.

The integrated degree apprenticeship is consistent with the UK Quality code for a Bachelors degree with honours comprising 360 credits in the Higher Education Credit framework. Apprentices must successfully pass 320 on-programme credits prior to taking the EPA, which is worth 40 credits. Apprentices without English and mathematics at level 2 on entry must achieve level 2 prior to taking their EPA. The EPA should only start once the employer is confident that the apprentice has developed all the knowledge, skills and behaviours defined in the apprenticeship standard and they hold a portfolio to evidence this.

The EPA consists of two distinct methods:

- Work Based Project,
- Professional Review.

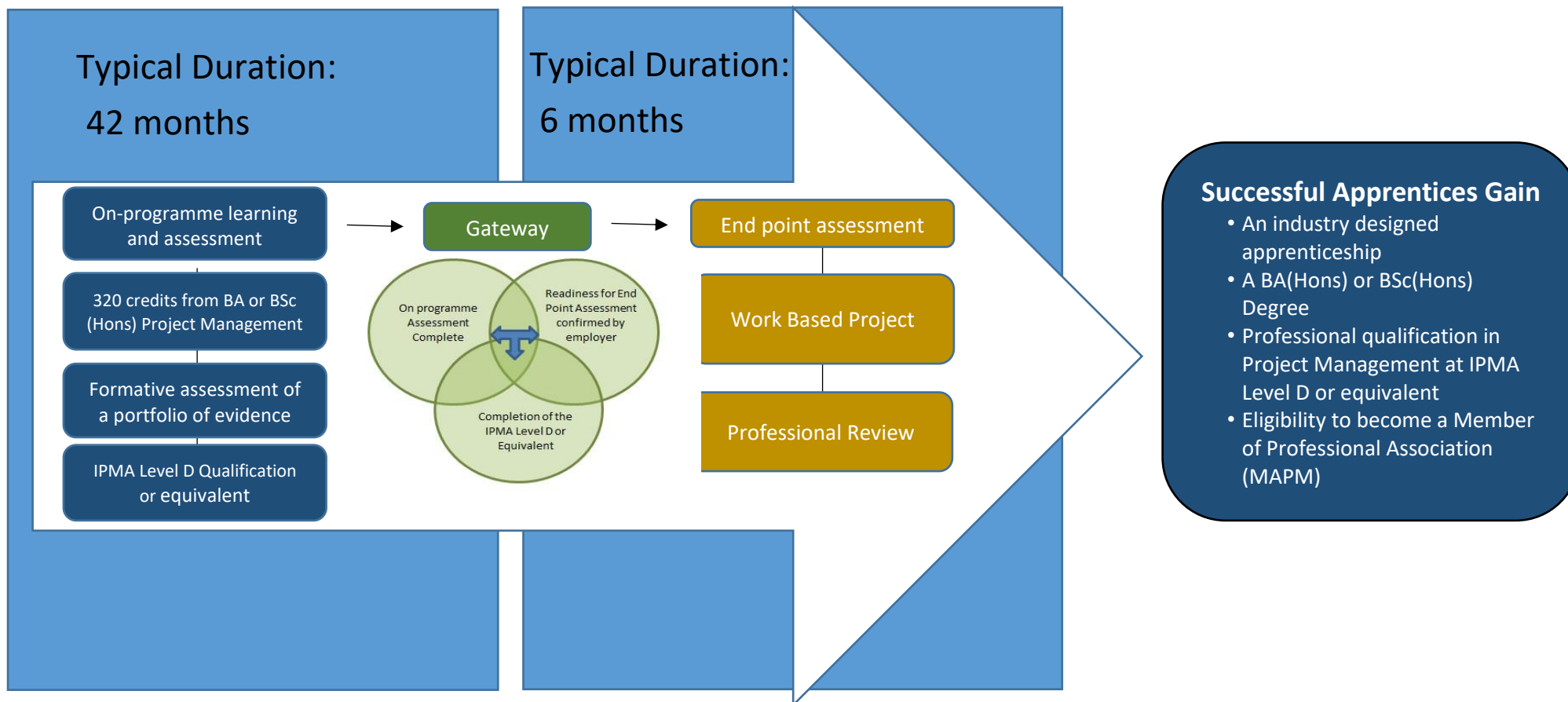
Performance in the EPA will count towards the overall degree classification. Apprentices cannot successfully complete the degree and therefore the apprenticeship without successfully passing the EPA. Performance in the EPA will be separately graded and determine the apprenticeship grade of pass, distinction or fail.

Apprenticeship Structure

The integrated degree will be a Bachelors degree with honours such as BSc (Hons) or BA (Hons) in Project Management or equivalent. HEIs will design on-programme training and assessment to develop the knowledge, skills and behaviours required in the published standard. It is recommended that in doing so they work with employers. In addition, employers must ensure that the working environment allows the apprentice the opportunity to demonstrate and reinforce and apply their learning. The employer will:

- Enable the apprentice to develop the evidence through the management of, and input to, relevant project experience to complete their Portfolio of Evidence.
- Work with the HEI to identify when the apprentice meets the Gateway criteria for the End Point Assessment.
- Support and facilitate the apprentice to complete the work based project element of the EPA. Provide the Apprentice with sufficient time and a learning area away from their normal place at work for Learning and Development activities.

During the on-programme stage, apprentices must collate an evidence portfolio upon which the end-point Professional Review will be structured. It must contain evidence of meeting the requirements of the standard. The HEI and employer, working in partnership, will provide guidance to support the development of the evidence portfolio in accordance with HEI and company policies and procedures. The following is a recommended structure for the Project Manager Integrated Degree apprenticeship. The apprentice will be required to demonstrate the application of their learning within a project management context.



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| Year 4 | 80 credits + End Point Assessment Gateway + End Point Assessment contributing a further 40 credits to Honours degree |
| Year 3 | 80 credits + Portfolio Building |
| Year 2 | 80 credits + Portfolio Building + IPMA Level D Qualification or equivalent |
| Year 1 | 80 credits + Portfolio Building |

Table 1 Recommended structure for the Project Manager Integrated Degree Apprenticeship

End-Point Assessment Gateway

The apprentice's employer, must confirm that the apprentice is eligible to enter EPA. To successfully pass the EPA Gateway, the apprentice must meet the following criteria:

- achieved a minimum level 2 English and Maths as per the standard and general apprenticeship requirements;
- attained the IPMA Level D Qualification or equivalent in Project Management;
- successfully completed the formal academic learning as defined by the HEI, equating to 320 on programme credits towards a Bachelors honours degree;
- receive confirmation from the employer that they are satisfied that the apprentice is consistently working at or above the level set out in the standard;
- have a project outline agreed with their academic supervisor and workplace representative, the outline must detail the project title, scope, key activities/milestones and expected outputs/measures of success.

Although the apprentice should only be recommended for EPA when they are ready, employers should have a remedial process in place to support any apprentice who fails to meet the eligibility criteria to enter EPA at the end of 42 months. The HEI will have a resit process in place to support any who fails to attain the 320 Higher Education credits necessary for attainment of Gateway Assessment.

End-Point Assessment

End-point assessment activities will typically be completed over a six month period to accommodate work scheduling and cost effective planning of resources. Moderation, HEI quality assurance and degree award processes may be completed after the EPA period. There is no requirement to complete Assessment Method 1 the Work Based Project before Assessment Method 2, the Professional Review. The Work Based Project Report must be submitted by the end of month 5 to allow for assessment to complete before the end of the EPA period. This means that the Professional Review can take place in Month 6, although it may take place earlier than this.

The EPA uses the following assessment methods:

- Assessment Method 1: A Work Based Project report with associated documentation (20 credits)
- Assessment Method 2: A Professional Review based on the evidence portfolio (20 credits)

The Work Based Project (Assessment Method 1)

The work based project must relate to the apprentice's work environment and must be formally agreed by the employer and academic supervisor. The report on the work based project must evidence the apprentice's attainment of knowledge, skills and behaviours of a project manager and demonstrate how these have been applied in a project environment. The Work Based Project report is an account of a project with which the apprentice has been involved and must include a critical appraisal of the project together with a critical review of their achievement in the relevant KSB areas of the standard (see Annexe A, Table A2). The Work Based Project is one that represents the appropriate skills, knowledge and behaviours in the standard. It provides a substantive evidence base from a work related project to demonstrate the application of skills, knowledge and behaviours. As project management is pan-sector, there are a wide range of contexts in which the project management KSBs can be demonstrated. Such project management scenarios could include: the implementation of a business change; the implementation of an off-site construction project; the analysis and implementation of a stock control system.

The report on the Work Based project will comprise 4,000 words (+/- 10% plus references, appendices and abstract). It must draw on appropriate references from academic and professional sources and use recognised academic referencing such as Harvard Referencing System to support this. Appendices to the report may be used to provide supporting evidence.

All work relating to the project and report write-up must be completed during the EPA period; excluding preliminary research to inform the project outline.

The project must be submitted by the end of Month 5 of the end-point assessment period. The work-based project will be reviewed by an independent assessor who will determine the grade for this component. This assessment is according to KSBs indicated in Annexe A and the criteria shown in table A2.

Professional Review (Assessment Method 2)

The Professional Review will synoptically assess knowledge, skills and behaviours as detailed in the standard (Annexe A, Table A3). The professional review is assessed through a formal presentation followed by an interview. **The professional review** panel (the panel) will consist of two members: one independent assessor and an industry expert nominated by the apprentice's employer. The independent assessor will be responsible for the grading of the End Point Assessment. The industry expert can provide information on industry context, if requested to do so by the independent assessor, but does not take part in the assessment. The apprentice must submit their evidence portfolio two weeks in advance of the professional review. The portfolio will contain naturally occurring evidence from the apprentice's day to day activities in the workplace that demonstrate competence in each of the relevant KSBs shown in Annexe A Table A1. The portfolio must contain a minimum of one and a maximum of three pieces of evidence for each of the relevant KSBs. Examples of such evidence may include: project schedules, risk assessments, governance documents and change requests. The portfolio must be presented and structured to a professional standard. The documentation for the Professional Review (evidence portfolio and presentation aids) will typically be held electronically in the learning management system of the HEI. Presentation aids will consist of slides to be presented during the review; typically 10 slides (+/- 1 slide).

The Professional Review must take place in a controlled environment; typically, at the HEI premises to allow for quality assurance and consistency of experience and access to the required documentation. The apprentice will prepare and deliver a presentation based on their achievement of the appropriate KSBs as evidenced and demonstrated in their portfolio. The presentation element will last 15 minutes (+/- 2 minutes), there will be a further 15 minutes (+/- 1 minute) allowed for questions at the end of the presentation. The apprentice will use presentation aids such as Power Point slides during the professional review. These must be submitted at least one week before the professional review to allow them to be uploaded into the learning management system of the HEI in advance of the review. A flipchart and pens will be made available in the room used for the professional review.

The presentation will be followed by an interview which will typically last 45 minutes (+/- 5 minutes). The independent assessor will use a minimum of five and a maximum of eight standardised questions from an agreed set of questions developed by the end-point assessment organisations. Questions will be selected in order to ensure the apprentice has the opportunity to demonstrate their competence in the relevant knowledge, skills and behaviour areas (see Annexe A, Table A1). Follow-up questions may be used to probe further into the detail in order to satisfy the panel of the depth of knowledge, skills and behaviour as appropriate.

The apprentice can have access to a copy of the submitted portfolio (typically on the learning management system of the HEI) at the professional review and may draw on this in answering the questions.

The professional review will be assessed against the knowledge, skills and behaviours as detailed in Annexe A and the criteria in Table A3.

Re-sits/re-takes

Apprentices will be offered the opportunity to re-sit/re-take in line with HEI regulations. In the case of re-sit, no additional learning is required; for re-take, additional learning is required. Typically, there will be an opportunity for the apprentice to submit an application for extenuating circumstances with appropriate evidence to be considered by an independent panel within the HEI. If the application for extenuating circumstances is accepted by the HEI, then the apprentice may be permitted to re-sit/re-take the entire EPA or a component of the EPA (as determined by the independent panel) as a first attempt. If an application for extenuating circumstances is not submitted or in the event that the application is not successful, then the apprentice typically would be offered an attempt to re-sit/re-take the EPA or component of the EPA (as determined by a board of examiners within the HEI) as a second attempt, the grade for the component affected being capped at a pass mark. The HEI will work with the employer and the apprentice to prepare a supportive action plan to prepare for any re-sit/re-take. The timing of any re-sit/re-take opportunity will be determined by the re-sit/re-take regulations within the HEI.

End-point Assessment Organisation – Roles & Responsibilities

End-point assessment organisations must appoint an appropriately qualified and experienced independent assessor, in line with the requirements in Table 2, to assess the Work Based project and the Professional Review.

| Title | Criteria | Role |
|---|--|--|
| Independent Assessor nominated by the HEI | <p>Hold a degree and a minimum of 5 years project management experience or a postgraduate qualification in project management or equivalent subject area.</p> <p>The independent assessor will typically not be an employee of the HEI providing the EPA but will be sourced from a different HEI. If this is not possible, an assessor from the HEI</p> | Responsible for EPA Grading of Work based Project and Professional review. |

| | | |
|--|--|--|
| | providing the EPA is acceptable, providing they have not been involved with the on-programme academic assessment of the apprentice. | |
| Industry Expert nominated by the apprentice's employer | Have a post-nominal recognition from a professional body for project management or have a minimum of 5 years industry experience. Will not have been involved with the on-programme assessment or mentoring of the apprentice. | Will attend project presentation and professional review panel. They will not be involved in the grading process. This is not the line manager of the apprentice. Their role is to provide industry input in relation to the industry practice only if requested to do so by the independent assessor. |

Table 2 Roles and Responsibilities of the EPA Panel.

Grading

Degree Grading

The degree grading will be in line with HEI regulations and results will be subject to the processes of the HEI in terms of resit and retake opportunities and in terms of exit awards when the 360 credits have not been attained for a BA/BSc (Hons) degree.

Apprenticeship Grading

Each End Point Assessment will be given an overall grade of pass, distinction or fail and this determines the apprenticeship grade. An apprenticeship pass represents full competence against the standard. A grade of distinction means an apprentice is demonstrating competence above the standard. The overall grade of the End Point Assessment is determined using the grades of the component elements of the assessment. An overall grade of distinction can only be obtained when a distinction has been awarded for both elements of the end point assessment. An overall grade pass can only be awarded if both elements are graded at pass or above.

In determining the grade for each individual component of the End Point Assessment, Tables A2 and A3 outlines the assessment criteria that will be applied for each component of the End Point Assessment. They are based on the following principles:

- all pass criteria need to be achieved; in achieving this, the apprentice will be demonstrating all knowledge, skills and behaviours in the standard;
- distinction builds on the pass criteria.

Determining the Overall Grade for the End Point Assessment

Each knowledge, skill and behaviour statement being assessed by an assessment method is graded pass or distinction. The criteria build on each other, i.e. apprentices achieving a distinction will have demonstrated achievement over and above the pass criteria. To calculate the final grade for each element of the EPA, the approach set out in Tables 3 and 4 is used.

| Assessment Method 1: Work Based Project (3 KSB elements – KA2, SA1, BA2) | |
|---|---|
| Any element failed | Fail, reassessment required in line with HEI regulations. |
| All 3 elements at pass or above | Pass |
| At least 2 elements at distinction | Distinction |

Table 3 Determining the Overall Grade of the Work Based Project

| Assessment Method 2: Professional Review (4 KSB elements – KA1, SA2, SA3, BA1) | |
|---|---|
| Any element failed | Fail, reassessment required in line with HEI regulations. |
| All 4 elements passed | Pass |
| At least 3 elements at distinction | Distinction |

Table 4 Determining the Overall Grade of the Professional Review

In terms of overall assessment and the final grade for the apprenticeship, Table 5 shows how the overall EPA grade is determined for each combination of assessment components.

| Assessment Method 1 Work Based Project | Assessment Method 2 Professional Review | EPA Grade |
|---|--|------------------|
| Fail | Pass or Distinction | Fail |
| Pass or Distinction | Fail | Fail |
| Pass | Pass or Distinction | Pass |
| Distinction | Pass | Pass |
| Distinction | Distinction | Distinction |

Table 5 Determining the Overall Grade of the End Point Assessment

End-point Assessment Organisation – Internal Quality Assurance Requirements

Internal quality assurance refers to the requirements the EPA organisations must have in place to ensure reliable, consistent and accurate assessment decisions. To fulfil these requirements, End-point assessment organisations must:

- develop and provide end-point assessment guidance to apprentices, employers and on-programme HEI personnel in relation to the EPA requirements
- develop detailed marking criteria for assessment methods, in-line with Table 3 and Annexe A
- allow reasonable adjustments to assessments to be made to assess the knowledge, skills and competence of the apprentice through alternative assessment techniques. Whilst these will remove barriers to participation, they must be designed to ensure judgements are not compromised to health and safety and legal requirements
- appoint independent assessors in line with requirements in Table 2
- monitor and provide support to independent assessors where required to ensure consistent assessment
- develop and provide documentation for recording assessment decisions
- hold bi-annual standardisation events for independent assessors to ensure consistent application of the guidance. Independent assessors need to attend a minimum of one standardisation event per year after their initial training.
- provide immediate guidance where end-point assessments need to be halted due to unforeseen circumstances e.g. system emergency, apprentice illness
- provide training for independent assessors in terms of the requirements of the operation and marking of the assessment methods and in undertaking fair and impartial assessment
- operate moderation of assessment activity and decisions, through the examination of documentation and observation of activity, with a minimum of 15% of each independent assessor's assessments moderated
- develop and maintain a question bank, for use in assessment method 2, of sufficient size to mitigate predictability

External Quality Assurance

The Institute for Apprenticeships is exploring whether QAA can undertake external quality assurance for this standard, arrangements will be confirmed by August 2018.

Professional Body Recognition

On successful completion, apprentices are eligible to become full members of Association for Project Management (APM), the Chartered Body for the Project Profession.

Implementation

Affordability

The initial, indicative EPA costs are expected to be no more than 20% of the total external apprenticeship costs.

Manageability/Feasibility of the Standard and Assessment Plan

While we envisage a three year 'approval' cycle for the standard we also acknowledge that we need to be prepared to monitor and evaluate early adopters' reactions and performance to ensure manageability/feasibility. It is expected that there would be in the region of 150 new starts per year, subject to employers' resourcing strategies.

Approved end-point assessment organisations will need to undertake work, to develop the EPA tools and processes. It is recommended that employers are consulted in the development of EPA approaches.

Scalability

In order to facilitate a wider uptake of the apprenticeship, means of conducting the EPA remotely are expected to allow more economic delivery and reduction of travel time for assessors and apprentices.

ANNEXE A Assessment Method and Grading Criteria

Project Manager Degree Apprenticeship

Table A1: Assessment Methods Mapping Project Management Degree Apprenticeship Standard

| | Knowledge | Assessed as part of | Assessment Method |
|-----|--|---------------------|-------------------|
| K1 | Governance and Financial Control of Projects | KA1 | 2 |
| K2 | The Business Environment | KA1 | 2 |
| K3 | Stakeholder and communications management | KA1 | 2 |
| K4 | Organisational Change Management | KA2 | 1 |
| K5 | Estimating, Planning and Scheduling | KA1 | 2 |
| K6 | Project Justification | KA1 | 2 |
| K7 | Quality Management | KA1 | 2 |
| K8 | Procurement and Contract Management | KA1 | 2 |
| K9 | Risk Management | KA1 | 2 |
| K10 | Project Change Control | KA1 | 2 |

| | | | |
|------------|--------------------------------|-----|---|
| K11 | Organisational Strategy | KA2 | 1 |
|------------|--------------------------------|-----|---|

| | Skills | Assessed as part of | Assessment Method |
|-----------|---|---------------------|-------------------|
| S1 | Governance Frameworks | SA1 | 1 |
| S2 | The Business Environment | SA2 | 2 |
| S3 | Stakeholder and communications management | SA3 | 2 |
| S4 | Control of projects in terms of time, cost and quality | SA1 | 1 |
| S5 | Risk Management | SA1 | 1 |
| S6 | Commercial and Contract management | SA1 | 1 |
| S7 | Project Change Control | SA1 | 1 |
| S8 | Schedule Management | SA1 | 1 |

| | Behaviours | Assessed as part of | Assessment Method |
|-----------|---|---------------------|-------------------|
| B1 | Leadership | BA1 | 2 |
| B2 | Collaboration and teamwork | BA1 | 2 |
| B3 | Personal and Professional Responsibility | BA2 | 1 |

| | | | |
|-----------|---|-----|---|
| B4 | Integrity, ethics, and professionalism | BA2 | 1 |
| B5 | Inclusive | BA1 | 2 |
| B6 | Innovation and Resourcefulness | BA1 | 2 |

Table A2: Grading Criteria for Work Based Project

| Knowledge / Skill / Behaviour | Fail | Pass | Distinction |
|-------------------------------|---|---|---|
| KA2 | Apprentice has not met the pass criteria. | Apprentice demonstrates that they can analyse and document an organisations' current state (roles, responsibilities, processes for example) and devise a plan to progress to a changed state following project completion in line with organisational strategy. | Apprentice demonstrates a critical awareness of the drivers for change including those arising from the external environment. Apprentice evaluates the outcome of the project and recommends actions to enhance the benefits from the project. |
| SA1 | Apprentice has not met the pass criteria. | Apprentice demonstrates that they can select and apply appropriate project management tools and techniques (including scheduling, risk management, commercial and contract management) to evaluate progress on a project and report against time, cost and quality criteria. Apprentice demonstrates that they can evaluate the need for change on | Apprentice identifies, critically evaluates and recommends appropriate actions to solve problems in areas of project management including governance, resource utilisation and scheduling. |

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|-----|---|---|--|
| | | <p>a project, assess the effect of such change and apply established processes for controlling this change.</p> <p>Apprentice evaluates the effect of change on the project business case and reports on any concerns arising from this.</p> | |
| BA2 | Apprentice has not met the pass criteria. | <p>Apprentice demonstrates resilience and determination in achieving project outcomes and that they are able to influence project team members and stakeholders to achieve project results.</p> <p>Apprentice demonstrates transparency and integrity in decision making in project management and when reporting to project stakeholders.</p> <p>Apprentice takes diverse perspectives into account in making project decisions and communicating with stakeholders.</p> | <p>Apprentice investigates, proposes and articulates innovative solutions to problems encountered in the project environment.</p> <p>Apprentice evaluates solutions from multiple perspectives and recommends appropriate ways forward in solving problems in a project environment.</p> |

Table A3: Grading Criteria for Professional Review

| Knowledge / Skill / Behaviour | Fail | Pass | Distinction |
|-------------------------------|---|--|--|
| KA1 | Apprentice has not met the pass criteria. | Apprentice documents and recommends appropriate project management solutions in the areas of project governance, business case development and project justification, communication plans, schedule development, project quality, procurement, risk management and project change control. | Apprentice investigates innovative project management tools and techniques and evaluates their suitability for use within the context of their project environment. Apprentice takes a leadership role in justifying the use of such tools and techniques and supporting the organisation in achieving benefit from using them. |
| SA2 | Apprentice has not met the pass criteria. | Apprentice demonstrates that they can analyse and assess the business context of projects and make recommendations suitable for inclusion in development and maintenance of a robust project business case. | Apprentice analyses and assesses a project business case against recognised standards and guidance. Apprentice, evaluates and predicts project outcomes and identifies opportunity for improvements to the business case. |
| SA3 | Apprentice has not met the pass criteria. | Apprentice demonstrates that they can analyse and assess stakeholder requirements. | Apprentice analyses and recommends improvements to stakeholder communications in order to improve project outcomes and facilitate benefits realisation. |

| | | | |
|-----|---|--|---|
| | | Apprentice communicates appropriately with a range of project stakeholders. | |
| BA1 | Apprentice has not met the pass criteria. | <p>Apprentice demonstrates that they can take a leadership role in a project environment with the ability to motivate all team members to achieve project results.</p> <p>Apprentice responds positively and proactively to feedback on performance and works proactively to analyse problems and develop solutions, taking into account the views of stakeholders and team members.</p> | <p>Apprentice recommends appropriate improvements to enhance team performance.</p> <p>Apprentice evaluates, recommends and implements solutions to complex problems arising in a project environment.</p> |