

# Associate Project Manager

End-Point Assessment Kit



# Highfield Level 4 End-Point Assessment for Associate Project Manager

EPA-Kit

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# How to Use This EPA Kit

Welcome to the Highfield End-Point Assessment Kit for the Associate Project Manager Apprenticeship Standard.

Highfield is an independent end-point assessment organisation that has been approved to offer and carry out the independent end-point assessments for the Level 4 Associate Project Manager Apprenticeship Standard. Highfield internally quality assures all end-point assessments in accordance with its IQA process and additionally all end-point assessments are externally quality assured by the relevant EQA organisation.

The EPA kit is designed to outline all you need to know about the end-point assessments for this standard and will also provide an overview of the on-programme delivery requirements. In addition, advice and guidance for trainers on how to prepare apprentices for the end-point assessment is included. The approaches suggested are not the only way in which an apprentice may be prepared for their assessments, but trainers may find them helpful as a starting point.

## Key facts:

<b>Apprenticeship standard:</b>	Associate Project Manager
<b>Level:</b>	4
<b>On Programme Duration:</b>	Typically 18-24 months
<b>Grading:</b>	Pass/Merit/Distinction
<b>End-Point Assessment methods:</b>	Presentation and professional discussion supported by a portfolio of evidence

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**In this kit, you will find:**

- an overview of the standard and any on-programme requirements
- a section focused on delivery, where the standard and assessment criteria are presented in a suggested format that is suitable for delivery
- guidance on how to prepare the apprentice for gateway
- detailed information on which part of the standard is assessed by which assessment method
- suggestions on how to prepare the apprentice for each part of the end-point assessment
- a section focused on the end-point assessment method where the assessment criteria are presented in a format suitable for carrying out 'mock' assessments

# Introduction

## Standard overview

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Projects can be defined and delivered within different contexts across diverse industry sectors. Every project, large or small, needs to be managed to ensure its success. An associate project manager will work with the project team to achieve the required outcomes and will need to know:

- what needs to be achieved
- how the project will be achieved
- how long the project will take
- how much the project will cost

An associate project manager will need good planning, organisation, leadership, management and communication skills. They will utilise resources with suitable skills, qualifications, experience and knowledge to work in a motivated and integrated team, with clearly defined reporting lines, roles, responsibilities and authorities.

Associate project managers' job titles can vary and are often dependent upon the size of the organisation and the complexity of the projects. Some organisations use 'project manager' as a generic job title; examples of other possible job titles include assistant project manager, junior project manager or project team leader

At the start of their apprenticeship, apprentices may become student members of the Association for Project Management (APM). Apprentices may also be able to apply for professional status with any other relevant professional body. Successful apprentices can become associate members of the APM.

## On-programme requirements

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While on-programme, the apprentice must complete a portfolio of evidence. This is an opportunity for the apprentice to demonstrate the knowledge, skills and behaviours required of them in their day-to-day work. The portfolio will need to include self-assessments and achievement logs completed by the apprentice as part of regular performance management with their line manager, along with any relevant supporting documents.

Prior to commencing work on the portfolio of evidence, the apprentice will need to agree with their employer and training provider which 15 learning areas, out of the 17 available, will provide the focus for the portfolio. They will also need to agree which 5 learning areas from the portfolio will be assessed by the presentation and which 10 learning areas from the portfolio will be assessed by the professional discussion.

The employer should ensure that the apprentice is involved in projects with a broad enough scope to address the chosen learning areas, allowing the apprentice to evidence the relevant knowledge, skills and behaviours. The apprentice should be provided with a framework for the portfolio, along with initial guidance on how to assemble evidence.

## **Additional, relevant on-programme qualification**

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Apprentices will be required to gain either the International Project Management Association (IPMA) qualification at Level D or the APM Project Manager qualification.

Upon commencement, apprentices may become student members of the Association for Project Management (APM) as the first step of professional membership. Apprentices will be eligible for progression to associate membership upon successful completion of the apprenticeship. Full membership can be attained through further experience and professional development.

## **Readiness for end-point assessment**

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In order for an apprentice to be ready for the end-point assessments:

- the English and maths components of the apprenticeship must be successfully completed by the apprentice
- the International Project Management Association (IPMA) at Level D or the APM Project Manager qualification must be successfully achieved
- the portfolio of evidence must be completed, ready to submit for review in advance of the expected end-point assessment date
- the line manager (employer) must be confident that the apprentice has developed all the knowledge, skills and behaviours defined in the apprenticeship standard and that the apprentice is competent in performing their role. To ensure this, the apprentice must attend a formal meeting with their employer to complete the gateway readiness report
- The apprentice and the employer should then engage with Highfield to agree a plan and schedule for each assessment activity to ensure all components can be completed within the end-assessment window. The assessment plan does not specify an assessment window for this standard. Highfield suggests a 3-month assessment window that starts from the attempt of the first activity.



## Order of end-point assessments

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There is no stipulated order of assessment methods. This will be discussed with the apprentice, training provider and/or employer with our scheduling team when scheduling the assessments to ensure that the learner is provided with the best opportunity to attempt the assessment.

Highfield recommend that the presentation should be followed by the professional discussion. Both must be supported by a portfolio of evidence completed on programme; the portfolio itself is not directly assessed.

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# The Highfield Approach

This section describes the approach Highfield has adopted in the development of this end-point assessment in terms of its interpretation of the requirements of the end-point assessment plan and other relevant documents.

## Documents used in developing this end-point assessment

Standard (2018, ST0310)

<https://www.instituteforapprenticeships.org/apprenticeship-standards/associate-project-manager/>

End-point assessment plan (2018, ST0310/3)

<https://www.instituteforapprenticeships.org/media/1970/associate-project-manager-assessment-plan-v3-to-publish.pdf>

## Specific considerations

All of the evidence criteria used within the end-point assessment have been written by Highfield and are based on the Associate Project Manager Apprenticeship Standard and assessment plan.

The Associate Project Manager assessment plan states that the combined assessment time for the presentation and professional discussion should be a minimum of at least one hour. The portfolio of evidence will have been submitted and evaluated 1 month prior to the presentation and professional discussion, with questions developed to test the apprentices' understanding of topic areas. To ensure a standardised approach, Highfield have assigned specific timings to each assessment method. The presentation should be carried out over a maximum assessment time of 40 minutes. Highfield recommend that the presentation itself should last approximately 20 minutes and should be followed by a 20-minute Q&A session. The professional discussion should be carried out over a maximum assessment time of 1 hour.

The assessment plan provides a five-point rating scale to determine the score for each learning area. To ensure this rating can be applied in a standardised and measurable way in practice, Highfield have decided that the scores will be determined based on the coverage of the assessment criteria as well as the depth an apprentice demonstrates in their presentation or their responses to questions in the Q&A or professional discussion. The assessment plan also states that a score of 5 can only be awarded if the apprentice 'consistently exceeds the standard in most areas'. Highfield have created an 'exceeding' criteria for each learning area. A score of 5 can only be awarded for a learning area if all

associated assessment criteria have been achieved AND the apprentice has exceeded the standard in some areas, which is evidenced through the achievement of the 'exceeding' criteria.

The assessment plan indicates that this assessment component will be assessed by a panel consisting of the end-point assessor, the training provider and employer. In the interests of standardisation, employers and training providers will be allowed to be present during the assessment however they will **not** be permitted to ask questions or contribute to the assessment process. They may assist by allowing support in contextualising or using terminology that the apprentice better understands.

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# Gateway

## How to prepare for gateway

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After apprentices have completed their on-programme learning, they should be ready to pass through 'gateway' to their end-point assessment.

Gateway is a meeting that should be arranged between the apprentice, their employer and training provider to determine that the apprentice is ready to undertake their end-point assessment. The apprentice should prepare for this meeting by bringing along work-based evidence, including:

- customer feedback
- recordings
- manager statements
- witness statements

As well as evidence from others, such as:

- mid and end-of-year performance reviews
- feedback to show how they have met the apprenticeship standards while on-programme

In advance of gateway, apprentices will need to have:

- achieved level 2 English
- achieved level 2 maths
- achieved the International Project Management Association (IPMA) qualification at Level D or the APM Project Manager qualification
- submitted their portfolio of evidence for review

Therefore, apprentices should be advised by employers and providers to gather this evidence and undertake these qualifications during their on-programme training. It is recommended that employers and providers complete regular checks and reviews of this evidence to ensure the apprentice is progressing and achieving the standards before the formal gateway meeting is arranged.

## The gateway meeting

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The gateway meeting should last around an hour and must be completed on or after the apprenticeship on-programme end date. It should be attended by the apprentice and the relevant people who have worked with the apprentice on-programme, such as the line manager/employer or mentor, the on-programme trainer/training provider and/or a senior manager (as appropriate to the business).

During the meeting, the apprentice, employer and training provider will discuss the apprentice's progress to date and confirm if the apprentice has met the full criteria of the apprenticeship standard during their on-programme training. The **Gateway Readiness Report** should be used to log the outcomes of the meeting and agreed by all 3 parties. This report is available to download from the Highfield Assessment website.

The report should then be submitted to Highfield to initiate the end-point assessment process. If you require any support completing the Gateway Readiness Report, please contact your Employer Engagement Manager at Highfield Assessment.

**Please note:** a copy of the standard should be available to all attendees during the gateway meeting.

### Reasonable adjustments and special considerations

Highfield Assessment has measures in place for apprentices who require additional support. Please refer to the Highfield Assessment Reasonable Adjustments Policy for further information/guidance.

### ID requirements

Highfield Assessment will need to ensure that the person undertaking an assessment is indeed the person they are claiming to be. All employers are therefore required to ensure that each apprentice has their identification with them on the day of the assessment so the end-point assessor can check.

Highfield Assessment will accept the following as proof of an apprentice's identity:

- a valid passport (any nationality)
- a signed UK photocard driving licence
- a valid warrant card issued by HM forces or the police
- another photographic ID card, e.g. employee ID card, travel card, etc.

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## The Associate Project Manager Apprenticeship Standard

The following pages contain the Associate Project Manager apprenticeship standard and the assessment criteria in a suggested format that is suitable for delivery.

Before beginning work on their portfolio, the apprentice will need to agree with their employer which 15 learning areas will provide the focus for the portfolio of evidence. The portfolio will not be directly assessed.

The apprentice and employer will also need to agree which 5 learning areas from the portfolio will be the focus of the presentation and which 10 learning areas from the portfolio will be the focus of the professional discussion.

<b>Governance</b>	
<b>Knowledge</b>	<b>Skills</b>
Different types of organisational structures and responsibilities, functions and project phases on different types of project. How governance can control and manage the successful delivery of projects. The significance of the project management plan (PMP)	Project monitoring and reporting cycle to track, assess and interpret performance by the application of progress monitoring techniques to analyse status and manage information.
<b>Presentation or Professional Discussion (supported by a Portfolio of Evidence)</b>	
<b>Knowledge</b>	
<b>Indicative assessment criteria</b>	
G1 Explain the <b>policies, procedures and regulations</b> relevant to their organisation G2 Describe the different types of <b>organisational structures</b> and responsibilities G3 Explain how different functions and project phases can affect different types of projects G4 Describe how governance can control and manage the successful delivery of projects G5 Explain the significance of the project management plan (PMP)	
<b>Skills</b>	
<b>Indicative assessment criteria</b>	
G6 Monitor projects and report cycle G7 Assess, track and interpret performance by the application of progress monitoring techniques G8 Analyse and manage the status of information	
<b>Exceeding assessment criteria</b>	
G9 <i>All assessment criteria in this learning area have been met and the apprentice has exceeded the standard in some areas</i>	

## Amplification and Guidance

- **Policies**
  - Internal/external rules that govern your behaviour e.g. how you are expected to treat others, how you would treat company property (data/equipment/uniform) or apply company controls within the workplace
- **Procedures**
  - Processes and ways of working within your workplace that you will need to be familiar with, operate within or expect others to complete tasks by
- **Regulations**
  - Determines what and how you or your project can deliver. They are generally set by external bodies, such as:
    - Construction
    - Gas Safe
    - Financial Conduct Authority
    - Ofgem, Ofcom, Ofwat
    - HSE
- **Organisational structures**
  - Outlines reporting lines and areas of responsibility within the company or place of work. This can help with understanding necessary stakeholders especially in areas of benefit delivery, business impact and project support

## Stakeholder and Communications Management

Knowledge	Skills
Stakeholders, their perspectives, different interests and levels of influence upon project outcomes, key contexts of a project communication plan, its effectiveness in managing different stakeholders. Factors which can affect communication.	Manage stakeholders, taking account of their levels of influence and particular interests. Manage conflicts and negotiations. Communicate to a variety of different audiences. Contribute to negotiations relating to project objectives.
<b>Presentation or Professional Discussion (supported by a Portfolio of Evidence)</b>	
<b>Knowledge</b>	
<b>Indicative assessment criteria</b>	
ST1 Compare how different <b>perspectives</b> and interests, along with the level of influence of a <b>stakeholder</b> , can affect the outcome of a project	
ST2 Describe the key context of a <b>project communication plan</b>	
ST3 Evaluate the effectiveness of a project communication plan when managing different stakeholders	
<b>Skills</b>	
<b>Indicative assessment criteria</b>	
ST4 Manage stakeholders, taking into account their particular interests and levels of influence	
ST5 Manage conflicts and negotiations	
ST6 Communicate to a variety of different audiences	
ST7 Contribute to negotiations relating to project objectives	
<b>Exceeding assessment criteria</b>	
ST8 <i>All assessment criteria in this learning area have been met and the apprentice has exceeded the standard in some areas</i>	



## Amplification and Guidance

- **Stakeholder**
  - Someone who has an interest in the project or portfolio because they are involved in the work or affected by the outcomes
- **Perspectives**
  - A stakeholders' perspective may be influenced by the role they have within the organisation as they will have wider considerations to consider, such as
    - People
    - Processes
    - Department/business performance
    - Targets, objectives and KPI's that they need to deliver or maintain
    - Responsibilities or accountabilities outside of the project
- **Project communication plan**
  - A control document which outlines the intended approach and audiences for regular communications and updates from the project. The plan will outline the different types of communications, their audiences, outline content and frequency

## Budgeting and Cost Control

Knowledge	Skills
Funding, estimating, overheads; direct costs, indirect costs, fixed costs, variable costs and an overall budget for a project; tracking systems for actual costs, accruals and committed costs; alternative cost breakdowns to provide for graphical representations and performance management.	Develop and agree project budgets, monitor forecast and actual costs against them and control changes. Support funding submissions. Tracking systems for actual costs, accruals and committed costs; structures for alternative cost breakdowns.
<b>Presentation or Professional Discussion (supported by a Portfolio of Evidence)</b>	
<b>Knowledge</b>	
<b>Indicative assessment criteria</b>	
BC1 Explain how your organisation funds different departments within its <b>budget</b> BC2 Explain how <b>overheads</b> can affect project budgets BC3 Describe the differences between indirect, direct, fixed and variable costs BC4 Describe how to work out an overall budget for a project BC5 Provide examples of <b>tracking systems</b> for actual costs, accruals and committed costs BC6 Outline alternative cost breakdowns to provide for graphical representations and performance management	
<b>Skills</b>	
<b>Indicative assessment criteria</b>	
BC7 Develop and agree project budgets BC8 Monitor <b>forecast and actual costs</b> against the project budget and effectively control changes BC9 Support funding submissions	
<b>Exceeding assessment criteria</b>	
BC10 <i>All assessment criteria in this learning area have been met and the apprentice has exceeded the standard in some areas</i>	

## Amplification and Guidance

- **Budget**
  - Allocated funding to a business/department/team/project over a defined period
- **Overheads**
  - Fixed ongoing costs that can be applied to a project such as rent, lighting or equipment hire for the period of the project
- **Tracking systems**
  - Processes and tools to track committed and actual spend against forecasts
- **Forecast and actual costs**
  - Forecast - what you predict to spend based on the information you have over the estimated timescales and resource/materials required to deliver
  - Actual Costs - what is actually spent and is generally based on time of invoice received for external costs or month end accounting cycle for internal costs i.e. resource

## Business Case and Benefits

Knowledge	Skills
Preparation and/or maintenance of business cases, including benefits management.	Contribute to the preparation or maintenance of a business case including achieving required outcomes
<b>Presentation or Professional Discussion (supported by a Portfolio of Evidence)</b>	
<b>Knowledge</b>	
<b>Indicative assessment criteria</b>	
BB1 Explain how a business case should be prepared and maintained, including <b>benefits management</b>	
<b>Skills</b>	
<b>Indicative assessment criteria</b>	
BB2 Contribute to the preparation or maintenance of a business case, including achieving the required outcomes	
<b>Exceeding assessment criteria</b>	
BB3 <i>All assessment criteria in this learning area have been met and the apprentice has exceeded the standard in some areas</i>	
<b>Amplification and Guidance</b>	
<ul style="list-style-type: none"> <li>• <b>Benefits management</b> <ul style="list-style-type: none"> <li>○ Outlines whether the benefits are clearly defined and identified for the project to deliver, when they are planned to be delivered and when they can be utilised and who will own the benefit realisation and how they will be tracked</li> </ul> </li> </ul>	

<b>Scope Management</b>	
<b>Knowledge</b>	<b>Skills</b>
Requirements management, and evaluation of alternative methods to learn from the past to improve delivery. Project scope change control, baseline change management, configuration management.	Determine, control and manage changes to the scope of a project, including assumptions, dependencies and constraints.
<b>Presentation or Professional Discussion (supported by a Portfolio of Evidence)</b>	
<b>Knowledge</b>	
<b>Indicative assessment criteria</b>	
SC1 Summarise requirements management, its purpose within a project and its importance within scope management SC2 Evaluate alternative scope management methods to learn from the past and improve future delivery SC3 Describe the approach, purpose and benefit of <b>project scope change control</b> SC4 Outline how <b>baseline change management</b> and <b>configuration management</b> apply within scope management and the reasons for their importance	
<b>Skills</b>	
<b>Indicative assessment criteria</b>	
SC5 Determine the scope of a project SC6 Control and manage any changes made to the scope of a project, including assumptions, dependencies and constraints	
<b>Exceeding assessment criteria</b>	
SC7 <i>All assessment criteria in this learning area have been met and the apprentice has exceeded the standard in some areas</i>	
<b>Amplification and Guidance</b>	
<ul style="list-style-type: none"> <li>• <b>Project scope change control</b> <ul style="list-style-type: none"> <li>○ The process and agreed approach to gaining visibility, control and acceptance of potential changes to an agreed project scope</li> </ul> </li> </ul>	

- **Baseline change management**
  - Agreed process and decision approach to the maintaining and updating of the project baseline
- **Configuration management**
  - Agreed approach to the versioning, control and storage of project documentation, specifications and deliverables

<b>Consolidated Planning</b>	
<b>Knowledge</b>	<b>Skills</b>
Purpose and formats for consolidated plans to support overall management, taking account of lessons learnt and how the plans balance fundamental components of scope, schedule, resources, budgets, risks and quality requirements.	Consolidate and document the fundamental components of projects. Monitor progress against the consolidated plan and refine as appropriate, implementing the change control process where relevant.
<b>Presentation or Professional Discussion (supported by a Portfolio of Evidence)</b>	
<b>Knowledge</b>	
<b>Indicative assessment criteria</b>	
CP1 Describe the purpose of <b>consolidated plans</b> to support overall management, taking account of lessons learnt CP2 Compare different formats that can be used for consolidated plans CP3 Explain how consolidated plans balance fundamental components of scope, schedule, resources, budgets, risks and quality requirements	
<b>Skills</b>	
<b>Indicative assessment criteria</b>	
CP4 Consolidate and document the fundamental components of projects CP5 Monitor progress against the consolidated plan and refine as appropriate CP6 Implement the change control process where relevant	
<b>Exceeding assessment criteria</b>	
CP7 <i>All assessment criteria in this learning area have been met and the apprentice has exceeded the standard in some areas</i>	
<b>Amplification and Guidance</b>	
<ul style="list-style-type: none"> <li>• <b>Consolidated plans</b> <ul style="list-style-type: none"> <li>○ a complete documented plan for the project including key activity or milestones from the workstreams (both internal and external)</li> </ul> </li> </ul>	

Schedule Management	
Knowledge	Skills
Scheduling and estimating for project activities including how they can be quality assessed. Progress monitoring and metrics to assess work performed against the schedule. Schedule management methods to evaluate and revise activities to improve confidence in delivery.	Prepare and maintain schedules for activities aligned to project delivery
Presentation or Professional Discussion (supported by a Portfolio of Evidence)	
Knowledge	
Indicative assessment criteria	
SM1 Summarise scheduling and estimating for project activities including how they can be quality assessed	
SM2 Describe how <b>progress monitoring</b> and <b>metrics</b> should be used to assess work performed against the schedule	
SM3 Compare different <b>schedule management methods</b> to evaluate and revise activities to improve confidence in delivery	
Skills	
Indicative assessment criteria	
SM4 Prepare and maintain schedules for activities aligned to project delivery	
Exceeding assessment criteria	
SM5 <i>All assessment criteria in this learning area have been met and the apprentice has exceeded the standard in some areas</i>	
Amplification and Guidance	
<ul style="list-style-type: none"> <li>• <b>Progress monitoring</b> <ul style="list-style-type: none"> <li>○ reporting or visibility from the workstreams, teams, individuals or 3rd parties completing work on your project. This can be monitored via systems such as JIRA, testrail or kanban boards (system or manual) or through regular progress reports,</li> </ul> </li> </ul>	



workstream meetings or 1-2-1s

- **Metrics**

- Measurable items or factors that can determine work completion or progress against timescales or cost

- **Schedule Management Methods**

- Once a complete plan is in place, PPM tools such as MS Project can be used to manage the schedule, assess progress and critical path.
- Initial and ongoing assessment can be completed and reviewed using a few different methods such as:
  - P.E.R.T diagrams (Project evaluation and review technique)
  - Network Node Diagrams
  - Critical path analysis diagrams

## Risk and Issue Management

Knowledge	Skills
The need for and implementation of a risk management plan. Risk management methods and techniques to identify and prioritise threats or opportunities. Mitigation actions to minimise risk impacts and to optimise benefits by managing opportunities.	Identify and monitor project risk or opportunity, plan and implement responses to them, contribute to a risk management plan. Respond to and manage issues within a defined governance structure.
<b>Presentation or Professional Discussion (supported by a Portfolio of Evidence)</b>	
<b>Knowledge</b>	
<b>Indicative assessment criteria</b>	
RI1	Evaluate the need for a <b>risk assessment plan</b> and describe how one should be implemented
RI2	Provide examples of <b>risk management methods and techniques</b> that could be used to identify and prioritise threats
RI3	Describe <b>mitigation actions</b> used to minimise risk impacts and optimise benefits by managing opportunities
<b>Skills</b>	
<b>Indicative assessment criteria</b>	
RI4	Identify and monitor project risk or opportunity
RI5	Plan and implement responses to a project risk or opportunity
RI6	Contribute to a risk management plan
RI7	Respond to and manage issues within a defined governance structure
<b>Exceeding assessment criteria</b>	
RI8	<i>All assessment criteria in this learning area have been met and the apprentice has exceeded the standard in some areas</i>
<b>Amplification and Guidance</b>	
<ul style="list-style-type: none"> <li>• <b>Risk assessment plan</b> <ul style="list-style-type: none"> <li>○ Outlines how the Risks identified within a project should be captured, assessed and escalated when appropriate</li> </ul> </li> </ul>	

- **Risk management methods and techniques**

- Most risk management approaches involve the use of a Risk Log either in MS Excel, other spreadsheet tools or a PPM tool

- **Mitigation actions**

- Agreed actions to either reduce, offset or remove a risk from the probability of impacting a project delivery, benefits or becoming an Issue that will require immediate escalation and action.

## Contract Management and Procurement

Knowledge	Skills
The nature of contracts, and their implications for contracting organisations. Procurement processes. Legal and ethical means for managing contracts.	Facilitate a procurement process, contribute to the definition of contractual agreements and contribute to managing a contract.
<b>Presentation or Professional Discussion (supported by a Portfolio of Evidence)</b>	
<b>Knowledge</b>	
<b>Indicative assessment criteria</b>	
CM1 Describe the nature of contracts CM2 Explain the implications of contracts for contracting organisations CM3 Provide examples of different <b>procurement processes</b> CM4 Outline the <b>legal and ethical means</b> for managing contracts	
<b>Skills</b>	
<b>Indicative assessment criteria</b>	
CM5 Facilitate a procurement process CM6 Contribute to the definition of contractual agreements CM7 Contribute to managing a contract	
<b>Exceeding assessment criteria</b>	
CM8 <i>All assessment criteria in this learning area have been met and the apprentice has exceeded the standard in some areas</i>	
<b>Amplification and Guidance</b>	
<ul style="list-style-type: none"> <li>● <b>Procurement process</b> <ul style="list-style-type: none"> <li>○ The approach taken to identify potential external partners or 3<sup>rd</sup> parties to complete defined tasks or services, negotiate and agree contract terms and prices for services, items or materials and manage the formulation of key documents such as</li> </ul> </li> </ul>	

Statement of Works, Statement of Requirements and Contract Variations.

- **Legal and ethical means**

- Code of conduct governing the professionalism that is expected when dealing with external parties and safe operation to avoid commercial and legal risk from misconduct by parties involved in the process

Quality Management	
Knowledge	Skills
Quality management processes, assurance and improvements. Outcomes of a quality management plan, metrics for processes and quality standards.	Develop a quality management plan, manage project assurance, and contribute to peer reviews. Utilise an organisation's continual improvement process including lessons learned.
Presentation or Professional Discussion (supported by a Portfolio of Evidence)	
Knowledge	
Indicative assessment criteria	
QM1 Summarise the importance and need for quality management processes, assurance and improvements QM2 Describe the different types of project assurance that are applied to your projects QM3 Outline your organisations approach to continuous improvement	
Skills	
Indicative assessment criteria	
QM4 Develop a <b>quality management plan</b> QM5 Manage <b>project assurance</b> and contribute to peer reviews QM6 Utilise an organisation's <b>continual improvement process</b> including lessons learned	
Exceeding assessment criteria	
QM7 <i>All assessment criteria in this learning area have been met and the apprentice has exceeded the standard in some areas</i>	
Amplification and Guidance	
<ul style="list-style-type: none"> <li>• <b>Quality Management Plan</b> <ul style="list-style-type: none"> <li>○ Outlines the acceptable quality levels within the project for processes, items or deliverables. The document will also outline or stipulate how this will be monitored and measured</li> </ul> </li> </ul>	

- **Project Assurance**
  - Review process to provide ongoing confidence against the controls and management being applied to a project
- **Continual improvement process**
  - An ongoing approach to improve products, services or processes.

<b>Resource Management</b>	
<b>Knowledge</b>	<b>Skills</b>
Resource analysis, resource allocation and resource acceptance.	Develop resource management plans for project activities, acquire and manage resources including commitment acceptance, monitor progress against plans.
<b>Presentation or Professional Discussion (supported by a Portfolio of Evidence)</b>	
<b>Knowledge</b>	
<b>Indicative assessment criteria</b>	
RM1 Understanding of how key project resources are identified through <b>resource analysis</b> approaches RM2 Describe your organisations process for <b>resource allocation</b> RM3 Summarise how <b>resource management plans</b> can assist in the monitoring and controlling of a project through the project lifecycle	
<b>Skills</b>	
<b>Indicative assessment criteria</b>	
RM4 Develop resource management plans for project activities RM5 Acquire and manage resources including <b>commitment acceptance</b> RM6 Monitor progress against plans	
<b>Exceeding assessment criteria</b>	
RM7 <i>All assessment criteria in this learning area have been met and the apprentice has exceeded the standard in some areas</i>	
<b>Amplification and Guidance</b>	
<ul style="list-style-type: none"> <li>• <b>Resource analysis</b> <ul style="list-style-type: none"> <li>○ The approach taken to identify and determine the time required for skilled and essential resource for a project. This will be an understanding of the distinct roles and skills needed, when they will be required and for how long.</li> </ul> </li> </ul>	



- **Resource allocation**
  - The process of submitting requests for and securing required resource for a project. This will include the release of resources to a project from other activities
- **Resource management plans**
  - The approach taken to identify and determine the time required for skilled and essential resource for a project. This will be an understanding of the distinct roles and skills needed, when they will be required and for how long.
- **Commitment acceptance**
  - Agreement to the Terms of Reference for the role, including an outline of work to be completed, expected quality standards and reporting lines and responsibilities

<b>Context</b>	
<b>Knowledge</b>	<b>Skills</b>
<p>The different contexts in which projects can be delivered, including health, safety, and environment management. The interdependencies between project(s), programme(s) and portfolio management. Project phases and key review points, across project life cycles.</p>	<p>Apply project management skills in the context of their organisation.</p>
<b>Presentation or Professional Discussion (supported by a Portfolio of Evidence)</b>	
<b>Knowledge</b>	
<b>Indicative assessment criteria</b>	
<p>C1 Provide examples of the different contexts in which projects can be delivered, including health, safety and environment management</p> <p>C2 Describe the interdependencies between project(s), programme(s) and portfolio management</p> <p>C3 Describe the different project phases and key review points that can be applied across the full life cycle</p>	
<b>Skills</b>	
<b>Indicative assessment criteria</b>	
<p>C4 Apply project management skills in the context of their organisation</p>	
<b>Exceeding assessment criteria</b>	
<p>C5 <i>All assessment criteria in this learning area have been met and the apprentice has exceeded the standard in some areas</i></p>	

## Collaboration and Team Work

### Behaviour

Understands and is effective in their role as part of an integrated team

### Presentation or Professional Discussion (supported by a Portfolio of Evidence)

### Behaviour

#### Indicative assessment criteria

- CT1 Understand their role as part of an **integrated team**
- CT2 Be effective in their role as part of an integrated team

#### Exceeding assessment criteria

- CT3 *All assessment criteria in this learning area have been met and the apprentice has exceeded the standard in some areas*

#### Amplification and Guidance

- **Integrated team**
  - o A collection of individuals working together to achieve a common shared goal or outcome for an organisation

Leadership	
Knowledge	Behaviour
The vision and values of the project and its links to objectives; the ways in which these can be effectively communicated and reinforced to team members and stakeholders. Leadership styles, qualities and the importance of motivation on team performance. Characteristics of the working environment which encourage and sustain high performance.	Communicates direction and supports the vision for project delivery
Presentation or Professional Discussion (supported by a Portfolio of Evidence)	
Knowledge	
Indicative assessment criteria	
L1 Describe the <b>vision and values</b> of the project L2 Summarise how the project links to the objectives L3 Explain how the project objectives should be effectively communicated and reinforced to team members and stakeholders L4 Provide examples of different <b>leadership styles</b> L5 Describe the qualities of different leadership styles L6 Explain the importance of motivation on team performance L7 Describe the characteristics of the working environment which can encourage and sustain high performance	
Behaviour	
Indicative assessment criteria	
L8 Communicate the direction of the business L9 Support the vision for project delivery	

### Exceeding assessment criteria

L10 *All assessment criteria in this learning area have been met and the apprentice has exceeded the standard in some areas*

### Amplification and Guidance

- **Vision and values**
  - The project will have a Vision Statement which outlines the desired end state that the project either delivers or contributes to. A project may apply its own values, ways of working or principles to guide and encourage collaboration and best practice approaches for a successful delivery
- **Leadership styles**
  - There are a few different leadership styles, many of which are outlined within leadership frameworks such as:
    - Bureaucratic
    - Charismatic
    - Servant
    - Transactional

## Communication

### Behaviour

Working effectively with and influencing others, taking account of diversity and equality. Influences and facilitates effective team performance.

### Presentation or Professional Discussion (supported by a Portfolio of Evidence)

### Behaviour

#### Indicative assessment criteria

CO1 Work effectively with and influencing others, taking account of **diversity** and **equality**

CO2 Influence and facilitate effective team performance

#### Exceeding assessment criteria

CO3 *All assessment criteria in this learning area have been met and the apprentice has exceeded the standard in some areas*

#### Amplification and Guidance

- **Diversity**
  - Recognising, valuing and respecting people's differences and contributions
- **Equality**
  - Providing equal opportunities for individuals or groups and ensuring that they are not treated differently from others based on their gender, age, religion, race, disability or beliefs

## Drive for Results

### Behaviour

Demonstrates clear commitment to achieving results and improving performance

### Presentation or Professional Discussion (supported by a Portfolio of Evidence)

### Behaviour

#### Indicative assessment criteria

DR1 Demonstrate clear commitment to achieving results and improving performance

#### Exceeding assessment criteria

DR2 *All assessment criteria in this learning area have been met and the apprentice has exceeded the standard in some areas*

## Integrity, ethics, compliance and professionalism

### Behaviour

Promotes the wider public good in all actions, acting in a morally, legally and socially appropriate manner. Promotes and models the highest standards of professional **integrity, ethics**, trust and continued development.

### Presentation or Professional Discussion (supported by a Portfolio of Evidence)

### Behaviour

#### Indicative assessment criteria

- IN1 Promote the wider public good in all actions
- IN2 Act in a morally, legally and socially appropriate manner
- IN3 Promote and model the highest standards of professional integrity, ethics, trust and continued development

#### Exceeding assessment criteria

- IN4 *All assessment criteria in this learning area have been met and the apprentice has exceeded the standard in some areas*

#### Amplification and Guidance

- **Integrity**
  - Being fair, truthful and honest with yourself and others. Doing the right thing for the right reasons.
- **Equality**
  - The moral principles that govern your behavior and how you conduct yourself in the workplace or within an activity

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# Assessment Summary

The end-point assessment for associate project manager is made up of 2 components that are recommended to be taken in the following order:

1. Presentation and Q&A session
2. Professional discussion

As an employer/training provider, you should agree a plan and schedule with the apprentice to ensure both assessment components can be completed effectively.

Each component of the end-point assessment will be assessed against the appropriate criteria laid out in this guide, which will be used to determine a grade for each individual component.

The assessment of both components is supported by a portfolio of evidence produced by the apprentice that must cover 15 of the 17 learning areas listed in this kit. Before beginning work on the portfolio, the apprentice should agree in a meeting with their employer and mentor the 15 learning areas to be covered AND also agree which 5 areas will be focus of the presentation. The remaining 10 areas will be the focus of the professional discussion.

## Presentation

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The presentation is based on 5 of the 17 learning areas identified in this kit and will be supported by the portfolio (see above). Each of the 5 learning areas selected for assessment will be scored out of 5. Each score will then be added together to give a total score out of 25.

## Professional discussion

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The professional discussion is based on 10 of the 17 learning areas identified in this kit and will be supported by the portfolio (see above). Each of the 10 learning areas selected for assessment will be scored out of 5. Each score will then be added together to give a total score out of 50.

## Grading

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Each of the 15 learning areas selected for assessment will be marked out of 5. This provides the scoring for each of the end-point assessment components as follows:

- For the presentation (supported by the portfolio of evidence), each of the 5 learning areas selected for assessment will be scored out of 5. Each score will then be added together to give a total score out of 25.
- For the professional discussion (supported by the portfolio of evidence), each of the 10 learning areas selected for assessment will be scored out of 5. Each score will then be added together to give a total score out of 50.

The score for each learning area will be determined based on the coverage of the assessment criteria as well as the depth an apprentice demonstrates in their presentation or their responses to questions in the Q&A or professional discussion. A score of 5 can only be awarded for a learning area if all associated assessment criteria have been achieved AND the apprentice has exceeded the standard in some areas, which is evidenced through the achievement of the 'exceeding' criteria.

The total scores for both the presentation and the professional discussion will be added together to give an overall total score out of 75.

The apprentice's final grade will be determined according to the following:

- **Pass:** total of the scores from both components in the range of 45 to 55
- **Merit:** total of the score from both components in the range of 56 to 65
- **Distinction:** total of the scores from both components in the range of 66 to 75

## Retake and Re-sit information

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If an apprentice fails an end-point assessment method, it is the employer, provider and apprentice's decision whether to attempt a resit or retake. If a **resit** is chosen, please call the Highfield scheduling team to arrange the resit. If a **retake** is chosen, the apprentice will require a period of further learning and will need to complete a new gateway readiness meeting and report. Once this is completed, please call the Highfield scheduling team to arrange the retake.

When undertaking a resit or retake, the assessment method(s) will need to be re-attempted in full, regardless of any individual assessment criteria that were passed on any prior attempt. The EPA Report will contain feedback on areas for development and resit or retake guidance.

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## Assessing the Presentation

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The presentation should be carried out over a maximum assessment time of 40 minutes. The presentation should last approximately 20 minutes and will be followed by a 20-minute question and answer session. The presentation will be based on the portfolio of evidence. The apprentice and employer will have agreed, prior to starting work on the portfolio, which 5 learning areas from the portfolio will be assessed by the presentation. A panel of assessors will review the portfolio of evidence submitted by the apprentice and will also conduct the presentation. The panel will comprise at least 2 members and may include representatives from the employer or learning provider but will include an independent assessor from Highfield.

Apprentices will be marked against the criteria included in the tables on the following pages. Each of the 5 learning areas selected for assessment will be scored out of 5. Each score will then be added together to give a total score out of 25.

### **Before the assessment:**

Employers/training providers should:

- ensure the apprentice knows the date, time and location of the assessment
- ensure that all necessary rooms and resources are booked
- brief the apprentice on the activities to be carried out and the duration of the assessment (20-minute presentation and 20-minute Q&A)
- confirm with the apprentice which 5 learning areas will be assessed (outlined on the following pages)
- encourage the apprentice to reflect on their experience and learning on-programme to understand what is required to meet the standard
- be prepared to provide clarification to the apprentice, and signpost them to relevant parts of their on-programme experience in preparation for their assessment

## Presentation Mock Assessment

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It is the employer/training provider's responsibility to prepare apprentices for their end-point assessment, and Highfield recommends that the apprentice experiences a trial or mock presentation in preparation for the real thing. The most appropriate form of mock assessment will depend on the apprentice's setting and the resources available at the time.

In designing a mock assessment, the employer/training provider should consider the following elements in their planning:

- a 40-minute time slot should be available for the presentation, if it is intended to be a complete mock assessment covering all relevant standards. However, this time may be split up to allow for progressive learning
- consider a video recording of the mock and allow the mock to be observed by other apprentices, especially if it is not practicable for the employer/training provider to carry out a separate mock assessment with each apprentice.
- ensure that the apprentice's performance is assessed by a competent trainer/assessor, and that feedback is shared with the apprentice to complete the learning experience. Mock assessment sheets are available to download from the Highfield Assessment website and may be used for this purpose.

## Presentation Criteria

During the presentation, the assessor will review the apprentice’s competence in the **5 pre-selected learning areas only**. Apprentices should prepare for the presentation by considering how the criteria can be met.

<b>Governance</b>	
<b>Indicative assessment criteria</b>	
G1	Explain the policies, procedures and regulations relevant to their organisation
G2	Describe the different types of organisational structures and responsibilities
G3	Explain how different functions and project phases can affect different types of projects
G4	Describe how governance can control and manage the successful delivery of projects
G5	Explain the significance of the project management plan (PMP)
G6	Monitor projects and report cycle
G7	Assess, track and interpret performance by the application of progress monitoring techniques
G8	Analyse and the manage the status of information
G9	<i>All assessment criteria in this learning area have been met and the apprentice has exceeded the standard in some areas</i>

<b>Stakeholder and Communications Management</b>	
<b>Indicative assessment criteria</b>	
ST1	Compare how different perspectives and interests, along with the level of influence of a stakeholder, can affect the outcome of a project
ST2	Describe the key context of a project communication plan
ST3	Evaluate the effectiveness of a project communication plan when managing different stakeholders

## Stakeholder and Communications Management

### Indicative assessment criteria

- ST4 Manage stakeholders, taking into account their particular interests and levels of influence
- ST5 Manage conflicts and negotiations
- ST6 Communicate to a variety of different audiences
- ST7 Contribute to negotiations relating to project objectives
- ST8 *All assessment criteria in this learning area have been met and the apprentice has exceeded the standard in some areas*

## Budgeting and cost control

### Indicative assessment criteria

- BC1 Explain how your organisation funds different departments within its budget
- BC2 Explain how overheads can affect project budgets
- BC3 Describe the differences between indirect, direct, fixed and variable costs
- BC4 Describe how to work out an overall budget for a project
- BC5 Provide examples of tracking systems for actual costs, accruals and committed costs
- BC6 Outline alternative cost breakdowns to provide for graphical representations and performance management
- BC7 Develop and agree project budgets
- BC8 Monitor forecast and actual costs against the project budget and effectively control changes
- BC9 Support funding submissions
- BC10 *All assessment criteria in this learning area have been met and the apprentice has exceeded the standard in some areas*

## Business case and benefits

### Indicative assessment criteria

## Business case and benefits

### Indicative assessment criteria

- BB1 Explain how a business case should be prepared and maintained, including benefits management
- BB2 Contribute to the preparation or maintenance of a business case, including achieving the required outcomes
- BB3 *All assessment criteria in this learning area have been met and the apprentice has exceeded the standard in some areas*

## Scope Management

### Indicative assessment criteria

- SC1 Summarise requirements management, its purpose within a project and its importance within scope management
- SC2 Evaluate alternative scope management methods to learn from the past and improve future delivery
- SC3 Describe the approach, purpose and benefit of project scope change control
- SC4 Outline how baseline change management and configuration management apply within scope management and the reasons for their importance
- SC5 Determine the scope of a project
- SC6 Control and manage any changes made to the scope of a project, including assumptions, dependencies and constraints
- SC7 *All assessment criteria in this learning area have been met and the apprentice has exceeded the standard in some areas*

## Consolidated planning

### Indicative assessment criteria

- CP1 Describe the purpose of consolidated plans to support overall management, taking account of lessons learnt
- CP2 Compare different formats that can be used for consolidated plans
- CP3 Explain how consolidated plans balance fundamental components of scope, schedule, resources, budgets, risks and quality requirements



## Consolidated planning

### Indicative assessment criteria

- CP4 Consolidate and document the fundamental components of projects
- CP5 Monitor progress against the consolidated plan and refine as appropriate
- CP6 Implement the change control process where relevant
- CP7 *All assessment criteria in this learning area have been met and the apprentice has exceeded the standard in some areas*

## Schedule Management

### Indicative assessment criteria

- SM1 Summarise scheduling and estimating for project activities including how they can be quality assessed
- SM2 Describe how progress monitoring and metrics should be used to assess work performed against the schedule
- SM3 Compare different schedule management methods to evaluate and revise activities to improve confidence in delivery
- SM4 Prepare and maintain schedules for activities aligned to project delivery
- SM5 *All assessment criteria in this learning area have been met and the apprentice has exceeded the standard in some areas*

## Risk and issue management

### Indicative assessment criteria

- RI1 Evaluate the need for a risk assessment plan and describe how one should be implemented
- RI2 Provide examples of risk management methods and techniques that could be used to identify and prioritise threats
- RI3 Describe mitigation actions used to minimise risk impacts and optimise benefits by managing opportunities
- RI4 Identify and monitor project risk or opportunity
- RI5 Plan and implement responses to a project risk or opportunity
- RI6 Contribute to a risk management plan
- RI7 Respond to and manage issues within a defined governance structure

## Risk and issue management

### Indicative assessment criteria

RI8 *All assessment criteria in this learning area have been met and the apprentice has exceeded the standard in some areas*

## Contract management and procurement

### Indicative assessment criteria

CM1 Describe the nature of contracts

CM2 Explain the implications of contracts for contracting organisations

CM3 Provide examples of different procurement processes

CM4 Outline the legal and ethical means for managing contracts

CM5 Facilitate a procurement process

CM6 Contribute to the definition of contractual agreements

CM7 Contribute to managing a contract

CM8 *All assessment criteria in this learning area have been met and the apprentice has exceeded the standard in some areas*

## Quality management

### Indicative assessment criteria

QM1 Summarise the importance and need for quality management processes, assurance and improvements

QM2 Describe the different types of project assurance that are applied to your projects

QM3 Outline your organisations approach to continuous improvement

QM4 Develop a quality management plan

QM5 Manage project assurance and contribute to peer reviews

QM6 Utilise an organisation's continual improvement process including lessons learned

QM7 *All assessment criteria in this learning area have been met and the apprentice has exceeded the standard in some areas*

## Resource management

### Indicative assessment criteria

- RM1 Understanding of how key project resources are identified through resource analysis approaches
- RM2 Describe your organisations process for resource allocation
- RM3 Summarise how resource management plans can assist in the monitoring and controlling of a project through the project lifecycle
- RM4 Develop resource management plans for project activities
- RM5 Acquire and manage resources including commitment acceptance
- RM6 Monitor progress against plans
- RM7 *All assessment criteria in this learning area have been met and the apprentice has exceeded the standard in some areas*

## Context

### Indicative assessment criteria

- C1 Provide examples of the different contexts in which projects can be delivered, including health, safety and environment management
- C2 Describe the interdependencies between project(s), programme(s) and portfolio management
- C3 Describe the different project phases and key review points that can be applied across the full life cycle
- C4 Apply project management skills in the context of their organisation
- C5 *All assessment criteria in this learning area have been met and the apprentice has exceeded the standard in some areas*

## Collaboration and team work

### Indicative assessment criteria

- CT1 Understand their role as part of an integrated team
- CT2 Be effective in their role as part of an integrated team
- CT3 *All assessment criteria in this learning area have been met and the apprentice has exceeded the standard in some areas*

## Leadership

### Indicative assessment criteria

- L1 Describe the vision and values of the project
- L2 Summarise how the project links to the objectives
- L3 Explain how the project objectives should be effectively communicated and reinforced to team members and stakeholders
- L4 Provide examples of different leadership styles
- L5 Describe the qualities of different leadership styles
- L6 Explain the importance of motivation on team performance
- L7 Describe the characteristics of the working environment which can encourage and sustain high performance
- L8 Communicate the direction of the business
- L9 Support the vision for project delivery
- L10 *All assessment criteria in this learning area have been met and the apprentice has exceeded the standard in some areas*

## Communication

### Indicative assessment criteria

- CO1 Work effectively with and influencing others, taking account of diversity and equality
- CO2 Influence and facilitate effective team performance
- CO3 *All assessment criteria in this learning area have been met and the apprentice has exceeded the standard in some areas*

## Drive for Results

### Indicative assessment criteria

- DR1 Demonstrate clear commitment to achieving results and improving performance
- DR2 *All assessment criteria in this learning area have been met and the apprentice has exceeded the standard in some areas*

## Integrity, ethics, compliance and professionalism

### Indicative assessment criteria

- IN1 Promote the wider public good in all actions
- IN2 Act in a morally, legally and socially appropriate manner
- IN3 Promote and model the highest standards of professional integrity, ethics, trust and continued development
- IN4 *All assessment criteria in this learning area have been met and the apprentice has exceeded the standard in some areas*

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## Assessing the Professional Discussion

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The professional discussion will be a structured discussion between the apprentice and the end-point assessor. The employer may be present to support, but not lead, the apprentice and to confirm information at the assessor's request.

The employer will **not** be allowed to add any further information or examples to what the apprentice has stated or lead them in any way. Highfield would encourage the employer/training provider and the apprentice to plan for the professional discussion and consider what resources they may bring with them to support them during their professional discussion. This must be their own work and will only be used to support the discussion.

The professional discussion will need to take place in a suitable environment and will last for 1 hour; it will assess the 10 pre-selected learning areas not covered by the presentation. The discussion will be assessed against the criteria that are outlined in the following pages and will be appropriately structured to draw out the best of the apprentice's energy, enthusiasm, competence and excellence.

Apprentices will be marked against the criteria included in the tables on the following pages. Each of the 10 learning areas selected for assessment will be scored out of 5. Each score will then be added together to give a total score out of 50.

The purpose of the professional discussion is to clarify any questions the end-point assessor has and will:

- confirm and validate judgements about the quality of work
- explore aspects of the work, including how it was carried out, in more detail
- discuss how the apprentice would behave in specific scenarios
- ask questions in relation to personal development and reflection
- provide a basis for the end-point assessor to make a decision about the grade to be awarded

### Before the assessment:

Employers/training providers should:

- plan the professional discussion to allow the apprentice the opportunity to demonstrate each of the required standards
- ensure the apprentice knows the date, time and location of the assessment
- confirm with the apprentice which 10 learning areas will be assessed (the associate project manager criteria are outlined on the following pages)

- encourage the apprentice to reflect on their experience and learning on-programme to understand what is required to meet the standard
- be prepared to provide clarification to the apprentice, and signpost them to relevant parts of their on-programme experience as preparation for this assessment

## Professional Discussion Mock Assessment

---

It is the employer/training provider's responsibility to prepare apprentices for their end-point assessment, and Highfield recommends that the apprentice experiences a mock professional discussion in preparation for the real thing. The most appropriate form of mock professional discussion will depend on the apprentice's setting and the resources available at the time.

In designing a mock assessment, the employer/training provider should consider the following elements in their planning:

- the mock professional discussion should take place in a suitable location
- a 60-minute time slot should be available to complete the professional discussion, if it is intended to be a complete professional discussion covering all relevant standards. However, this time may be split up to allow for progressive learning
- consider a video or audio recording of the mock professional discussion and allow it to be observed by other apprentices, especially if it is not practicable for the employer/training provider to carry out a separate mock assessment with each apprentice
- ensure that the apprentice's performance is assessed by a competent trainer/assessor, and that feedback is shared with the apprentice to complete the learning experience. Mock assessment sheets are available to download from the Highfield Assessment website and may be used for this purpose
- use structured 'open' questions that do not lead the apprentice but allows them to express their knowledge and experience in a calm and comfortable manner. For example:
  - Which regulations are relevant to your organisation?
  - In what ways can governance influence the successful delivery of a project?
  - How can differing stakeholder views influence a project outcome?
  - What roles do business cases have in project management?

## Professional Discussion Criteria

Throughout the 60-minute professional discussion, the assessor will review the apprentice's competence in the **10 pre-selected learning areas only**; therefore, apprentices should prepare for the professional discussion by considering how the criteria can be met.

Governance	
Indicative assessment criteria	
G1	Explain the policies, procedures and regulations relevant to their organisation
G2	Describe the different types of organisational structures and responsibilities
G3	Explain how different functions and project phases can affect different types of projects
G4	Describe how governance can control and manage the successful delivery of projects
G5	Explain the significance of the project management plan (PMP)
G6	Monitor projects and report cycle
G7	Assess, track and interpret performance by the application of progress monitoring techniques
G8	Analyse and the manage the status of information
G9	<i>All assessment criteria in this learning area have been met and the apprentice has exceeded the standard in some areas</i>

Stakeholder and Communications Management	
Indicative assessment criteria	
ST1	Compare how different perspectives and interests, along with the level of influence of a stakeholder, can affect the outcome of a project
ST2	Describe the key context of a project communication plan
ST3	Evaluate the effectiveness of a project communication plan when managing different stakeholders



## Stakeholder and Communications Management

### Indicative assessment criteria

- ST4 Manage stakeholders, taking into account their particular interests and levels of influence
- ST5 Manage conflicts and negotiations
- ST6 Communicate to a variety of different audiences
- ST7 Contribute to negotiations relating to project objectives
- ST8 *All assessment criteria in this learning area have been met and the apprentice has exceeded the standard in some areas*

## Budgeting and cost control

### Indicative assessment criteria

- BC1 Explain how your organisation funds different departments within its budget
- BC2 Explain how overheads can affect project budgets
- BC3 Describe the differences between indirect, direct, fixed and variable costs
- BC4 Describe how to work out an overall budget for a project
- BC5 Provide examples of tracking systems for actual costs, accruals and committed costs
- BC6 Outline alternative cost breakdowns to provide for graphical representations and performance management
- BC7 Develop and agree project budgets
- BC8 Monitor forecast and actual costs against the project budget and effectively control changes
- BC9 Support funding submissions
- BC10 *All assessment criteria in this learning area have been met and the apprentice has exceeded the standard in some areas*

## Business case and benefits

### Indicative assessment criteria

- BB1 Explain how a business case should be prepared and maintained, including benefits management
- BB2 Contribute to the preparation or maintenance of a business case, including achieving the required outcomes

## Business case and benefits

### Indicative assessment criteria

BB3 *All assessment criteria in this learning area have been met and the apprentice has exceeded the standard in some areas*

## Scope Management

### Indicative assessment criteria

- SC1 Summarise requirements management, its purpose within a project and its importance within scope management
- SC2 Evaluate alternative scope management methods to learn from the past and improve future delivery
- SC3 Describe the approach, purpose and benefit of project scope change control
- SC4 Outline how baseline change management and configuration management apply within scope management and the reasons for their importance
- SC5 Determine the scope of a project
- SC6 Control and manage any changes made to the scope of a project, including assumptions, dependencies and constraints
- SC7 *All assessment criteria in this learning area have been met and the apprentice has exceeded the standard in some areas*

## Consolidated planning

### Indicative assessment criteria

- CP1 Describe the purpose of consolidated plans to support overall management, taking account of lessons learnt
- CP2 Compare different formats that can be used for consolidated plans
- CP3 Explain how consolidated plans balance fundamental components of scope, schedule, resources, budgets, risks and quality requirements
- CP4 Consolidate and document the fundamental components of projects
- CP5 Monitor progress against the consolidated plan and refine as appropriate
- CP6 Implement the change control process where relevant
- CP7 *All assessment criteria in this learning area have been met and the apprentice has exceeded the standard in some areas*

## Schedule Management

### Indicative assessment criteria

- SM1 Summarise scheduling and estimating for project activities including how they can be quality assessed
- SM2 Describe how progress monitoring and metrics should be used to assess work performed against the schedule
- SM3 Compare different schedule management methods to evaluate and revise activities to improve confidence in delivery
- SM4 Prepare and maintain schedules for activities aligned to project delivery
- SM5 *All assessment criteria in this learning area have been met and the apprentice has exceeded the standard in some areas*

## Risk and issue management

### Indicative assessment criteria

- RI1 Evaluate the need for a risk assessment plan and describe how one should be implemented
- RI2 Provide examples of risk management methods and techniques that could be used to identify and prioritise threats
- RI3 Describe mitigation actions used to minimise risk impacts and optimise benefits by managing opportunities

## Risk and issue management

### Indicative assessment criteria

- RI4 Identify and monitor project risk or opportunity
- RI5 Plan and implement responses to a project risk or opportunity
- RI6 Contribute to a risk management plan
- RI7 Respond to and manage issues within a defined governance structure
- RI8 *All assessment criteria in this learning area have been met and the apprentice has exceeded the standard in some areas*

## Contract management and procurement

### Indicative assessment criteria

- CM1 Describe the nature of contracts
- CM2 Explain the implications of contracts for contracting organisations
- CM3 Provide examples of different procurement processes
- CM4 Outline the legal and ethical means for managing contracts
- CM5 Facilitate a procurement process
- CM6 Contribute to the definition of contractual agreements
- CM7 Contribute to managing a contract
- CM8 *All assessment criteria in this learning area have been met and the apprentice has exceeded the standard in some areas*

## Quality management

### Indicative assessment criteria

- QM1 Summarise the importance and need for quality management processes, assurance and improvements
- QM2 Describe the different types of project assurance that are applied to your projects
- QM3 Outline your organisations approach to continuous improvement

## Quality management

### Indicative assessment criteria

- QM4 Develop a quality management plan
- QM5 Manage project assurance and contribute to peer reviews
- QM6 Utilise an organisation's continual improvement process including lessons learned
- QM7 *All assessment criteria in this learning area have been met and the apprentice has exceeded the standard in some areas*

## Resource management

### Indicative assessment criteria

- RM1 Understanding of how key project resources are identified through resource analysis approaches
- RM2 Describe your organisations process for resource allocation
- RM3 Summarise how resource management plans can assist in the monitoring and controlling of a project through the project lifecycle
- RM4 Develop resource management plans for project activities
- RM5 Acquire and manage resources including commitment acceptance
- RM6 Monitor progress against plans
- RM7 *All assessment criteria in this learning area have been met and the apprentice has exceeded the standard in some areas*

## Context

### Indicative assessment criteria

- C1 Provide examples of the different contexts in which projects can be delivered, including health, safety and environment management
- C2 Describe the interdependencies between project(s), programme(s) and portfolio management
- C3 Describe the different project phases and key review points that can be applied across the full life cycle
- C4 Apply project management skills in the context of their organisation
- C5 *All assessment criteria in this learning area have been met and the apprentice has exceeded the standard in some areas*

## Collaboration and team work

### Indicative assessment criteria

- CT1 Understand their role as part of an integrated team
- CT2 Be effective in their role as part of an integrated team
- CT3 *All assessment criteria in this learning area have been met and the apprentice has exceeded the standard in some areas*

## Leadership

### Indicative assessment criteria

- L1 Describe the vision and values of the project
- L2 Summarise how the project links to the objectives
- L3 Explain how the project objectives should be effectively communicated and reinforced to team members and stakeholders
- L4 Provide examples of different leadership styles
- L5 Describe the qualities of different leadership styles
- L6 Explain the importance of motivation on team performance
- L7 Describe the characteristics of the working environment which can encourage and sustain high performance

## Leadership

### Indicative assessment criteria

L8 Communicate the direction of the business

L9 Support the vision for project delivery

L10 *All assessment criteria in this learning area have been met and the apprentice has exceeded the standard in some areas*

## Communication

### Indicative assessment criteria

CO1 Work effectively with and influencing others, taking account of diversity and equality

CO2 Influence and facilitate effective team performance

CO3 *All assessment criteria in this learning area have been met and the apprentice has exceeded the standard in some areas*

## Drive for Results

### Indicative assessment criteria

DR1 Demonstrate clear commitment to achieving results and improving performance

DR2 *All assessment criteria in this learning area have been met and the apprentice has exceeded the standard in some areas*

## Integrity, ethics, compliance and professionalism

### Indicative assessment criteria

- IN1 Promote the wider public good in all actions
- IN2 Act in a morally, legally and socially appropriate manner
- IN3 Promote and model the highest standards of professional integrity, ethics, trust and continued development
- IN4 *All assessment criteria in this learning area have been met and the apprentice has exceeded the standard in some areas*

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