

# End-point assessment plan for Professional forester apprenticeship standard

Apprenticeship standard number	Apprenticeship standard level	Integrated end-point assessment
ST0923	6	No

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## Introduction and overview

This document sets out the requirements for end-point assessment (EPA) for the Professional Forester apprenticeship standard. It explains how EPA for this apprenticeship must operate.

This document provides the EPA design requirements for end-point assessment organisations (EPAOs) for this apprenticeship standard. It will also be useful for apprentices undertaking this apprenticeship, their employers and training providers.

EPA must be conducted by an EPAO approved to deliver EPA for this apprenticeship standard. Each employer should select an approved EPAO from the Education & Skills Funding Agency's Register of end-point assessment organisations (RoEPAO).

Full-time apprentices will typically spend 36 months on-programme (before the gateway) working towards this occupational standard. All apprentices must spend a minimum of 12 months on-programme. All apprentices must spend a minimum of 20% of on-programme time undertaking off-the-job training.

Before starting EPA, an apprentice must meet the gateway requirements. For this apprenticeship they are:

- the employer must be content that the apprentice is working at or above the occupational standard
- apprentices must have achieved all qualifications mandated in the Professional Forester occupational standard

The qualifications required are:

- apprentices must have achieved English and mathematics at Level 2<sup>1</sup>
- BSc in Forest Management

The EPAO must confirm that all required gateway evidence has been provided and accepted as meeting the gateway requirements. The EPAO is responsible for confirming gateway eligibility. Once this has been confirmed, the EPA period starts.

This EPA should then be completed within an EPA period lasting typically 6 months.

This EPA consists of 2 discrete assessment methods.

It will be possible to achieve the following grades in each end-point assessment method:

Assessment method 1: Project report and presentation with questioning

- fail
- pass
- distinction

## Assessment method 2: Professional discussion underpinned by a portfolio

- fail
- pass
- distinction

Performance in the end-point assessment methods will determine the overall apprenticeship standard grade of:

- fail
- pass
- distinction

For those with an education, health and care plan or a legacy statement, the apprenticeship's English and mathematics minimum requirement is Entry Level 3. British Sign Language (BSL) qualifications are an alternative to English qualifications for those who have BSL as their primary language.

## EPA summary table

<p><b>On-programme</b> (typically 36 months)</p>	<p>Training to develop the knowledge, skills and behaviours (KSBs) of the occupational standard.</p> <p>Training towards BSc in Forest Management.</p> <p>Training towards English and mathematics Level 1 and 2, if required.</p> <p>Compiling a portfolio of evidence.</p>
<p><b>End-point assessment gateway</b></p>	<p>The employer must be content that the apprentice is working at or above the level of the occupational standard.</p> <p>Apprentices must have achieved all qualifications mandated in the Professional Forester occupational standard. The qualifications required are:</p> <ul style="list-style-type: none"> <li>• BSc in Forest Management</li> </ul> <p>Apprentices must have achieved English and mathematics at Level 2.</p> <p>For the project report and presentation with questioning the EPAO must sign off a project title and scope to confirm its suitability at the gateway.</p> <p>For the professional discussion apprentices must submit a portfolio of evidence.</p>
<p><b>End-point assessment</b> (typically 6 months)</p>	<p>End-point assessment method 1: Project report and presentation with questioning, graded:</p> <ul style="list-style-type: none"> <li>• fail</li> <li>• pass</li> <li>• distinction</li> </ul> <p>End-point assessment method 2: Professional discussion underpinned by a portfolio, graded:</p> <ul style="list-style-type: none"> <li>• fail</li> <li>• pass</li> <li>• distinction</li> </ul>

	<p>Performance in the EPA will determine the overall apprenticeship standard grade of:</p> <ul style="list-style-type: none"><li>• fail</li><li>• pass</li><li>• distinction</li></ul>
<b>Professional recognition</b>	<p>Aligns with recognition by:</p> <ul style="list-style-type: none"><li>• Chartered Forester for Institute of Chartered Foresters (MICFor)</li></ul>

## Length of EPA period

The EPA will be completed within an EPA period lasting typically for 6 months, starting when the EPAO has confirmed that all gateway requirements have been met. Any supporting material which underpins an EPA assessment method should be submitted at the gateway.

## Order of end-point assessment methods

The assessment methods can be delivered in any order.

The result of one assessment method does not need to be known before starting the next.

## EPA gateway

The EPA period should only start once the employer is satisfied that the apprentice is consistently working at or above the level set out in the occupational standard, that is to say they are deemed to have achieved occupational competence. In making this decision, the employer may take advice from the apprentice's training provider(s), but the decision must ultimately be made solely by the employer.

In addition to the employer's confirmation that the apprentice is working at or above the level of the occupational standard, the apprentice must have completed the following gateway requirements prior to starting EPA:

- achieved English and Mathematics at Level 2.
- achieved a BSc in Forest Management
- completed a portfolio of evidence

For the project report and presentation with questioning the EPAO must sign off a project title and scope to confirm its suitability at the gateway.

For the professional discussion underpinned by a portfolio, the apprentice will be required to submit a portfolio of evidence.

### Portfolio of evidence requirements

- apprentices must compile a portfolio of evidence during the on-programme period of the apprenticeship
- it must contain evidence related to the KSBs that will be assessed by the Professional discussion underpinned by portfolio
- the portfolio of evidence will typically contain 20 discrete pieces of evidence
- evidence must be mapped against the KSBs
- evidence may be used to demonstrate more than one KSB; a qualitative as opposed to quantitative approach is suggested
- evidence sources may include:
  - workplace documentation/records, for example workplace policies/procedures, records drawings
  - plans
  - work diary entries
  - work record
  - reports
  - correspondence
  - witness statements
  - annotated photographs

- video clips (maximum total duration 10 minutes); the apprentice must be in view and identifiable
- training records
- training course completion
- career profile and critical analysis of work done

This is not a definitive list; other evidence sources are possible.

- it should not include reflective accounts or any methods of self-assessment
- any employer contributions should focus on direct observation of performance (for example witness statements) rather than opinions
- the evidence provided must be valid and attributable to the apprentice; the portfolio of evidence must contain a statement from the employer and apprentice confirming this
- the portfolio of evidence must be submitted to the EPAO at the gateway

The portfolio of evidence is not directly assessed. It underpins the professional discussion assessment method and therefore should not be marked by the EPAO. EPAOs should review the portfolio of evidence in preparation for the professional discussion but are not required to provide feedback after this review of the portfolio.

## End-point assessment methods

The apprentice will be assessed against the KSBs assigned to the assessment methods outlined below, as shown in the mapping section of this EPA plan.

### Assessment method 1: Project report and presentation with questioning (This assessment method has 2 components.)

#### Overview

A project involves the apprentice completing a significant and defined piece of work that has a real business benefit and then writing a report on the project work completed. The project, and all the work that contributes to it, must be undertaken after the apprentice has gone through the gateway.

The project should be designed to ensure that the apprentice's work meets the needs of the business, is relevant to their role and allows the relevant KSBs to be assessed for the EPA. Therefore, the project's subject, title and scope will be agreed between the employer and the EPAO at the gateway. The employer will ensure it has a silvicultural application and the EPAO will ensure it meets the requirements of the EPA, including suitable coverage of the KSBs assigned to this assessment method as shown in the mapping of assessment methods. The EPAO must refer to the grading descriptors to ensure that projects are pitched appropriately.

This assessment method includes two components:

- a project report
- a presentation followed by questioning to ensure the apprentice is assessed against their evidence

The rationale for this assessment method is:

- The core role of a professional forester is planning the creation and management of forests.
- These plans bring together a wide range of skills and technical knowledge in a holistic way that is highly applicable to the work environment.
- It also requires them to communicate information both graphically and in written form in a way that is very relevant to the role.
- Employers consider it crucial that apprentices can write a clear, well researched, argued and evidenced plans, making this an effective and cost-efficient assessment method.
- Professional foresters have to present their suggestions for silvicultural solutions to clients and stakeholders in line with specification requirements. This method tests the KSBs mapped to it, and tests underpinning knowledge and understanding.
- Other methods, such as direct observation would not be possible because it would be impractical/take too long.

## Assessment method 1: Component 1 – Project report

### Delivery

Apprentices will conduct a written project reporting the form of a woodland management plan or woodland creation plan as agreed at gateway. Woodland management plans should cover a time period of at least 20 years and woodland creation plans should include the successful establishment of a woodland.

The project report is completed after the apprentice has gone through the gateway process. The apprentice will conduct their project, complete their report, and submit it to the EPAO after a maximum of 12 weeks from the EPA start date. The project starts after the apprentice has gone through the gateway. The typical duration of the project should be 120 hours of work, inclusive of the time to write the report and prepare the presentation.

The employer will ensure the apprentice has sufficient time and the necessary resources to plan, undertake the project and write the report. The apprentice should complete their project and project report unaided and when it is submitted to the EPAO, the apprentice and their employer must verify that it is the apprentice's own work.

The project report should be either paper-based or in an electronic format.

The project report has a word count of 6000 words. A tolerance of plus or minus 10% is allowed. Appendices, references, diagrams etc will not be included in this total. The project content will include:

- vision and objectives
- introduction
- site survey
- woodland protection and resilience
- management strategy or design strategy
- stakeholder engagement
- phased monitoring schedule / plan review

The project must map, in an appendix, how it evidences the relevant KSBs for this assessment method. This is not included in the word count.

The apprentice should complete their project unaided. When the project report is submitted, the apprentice and their employer must verify that the submitted project report is the apprentice's own work.

## Assessment Method 1: Component 2: Presentation and questioning

### Overview

A presentation involves an apprentice presenting to an independent assessor, focusing on a particular topic. It will be followed by questioning from the independent assessor. Apprentices

will prepare and deliver a presentation that appropriately covers the KSBs assigned to this method of assessment.

## Delivery

The apprentice will have a minimum of 10 days' notice of the presentation from the EPAO to prepare for the presentation with questioning.

The presentation will be completed after the gateway and will be presented to an independent assessor, either face-to-face or via online video conferencing. Video conferencing can be used to conduct the presentation, but the EPAO must have processes in place to verify the identity of the apprentice and ensure the apprentice is not being aided.

The presentation will be based on the project report and will cover:

- a summary of the project report
- an explanation of how and why specific techniques and criteria have been selected
- improvements moving forward
- recommendations
- conclusions

The independent assessor must have 4 weeks to review the report prior to the presentation.

The presentation and questioning will last for 60 minutes, typically including a 20-minute presentation and questioning for 40 minutes. The independent assessor has the discretion to increase the time of the presentation by up to 10% to allow the apprentice to complete their last point or respond to a question.

The purpose of the questioning is:

- to verify that the project is the apprentice's own work
- to seek clarification on the report or presentation
- to assess the depth and breadth of knowledge, skills and behaviours
- to assess those KSBs that the apprentice did not have the opportunity to demonstrate during the project, although these should be kept to a minimum

The independent assessor will ask a minimum of 5 questions at the end of the presentation. Follow-up questions are allowed and do not form part of the question number count.

The purpose of the questioning will be to explore aspects of the project including:

- how it was carried out
- to clarify points as necessary

- to assess the depth and breadth of knowledge, skills and behaviours mapped to this method

KSBs met and answers to questions, must be recorded by the independent assessor, for the quality assurance purposes of the EPAO. The independent assessor will make all grading decisions.

Independent assessors are responsible for generating suitable follow-up questions in line with the EPAO's training and standardisation process. The questions relating to underpinning KSBs must be varied yet allow assessment of the relevant KSBs. The independent assessor must use the assessment tools and procedures that are set by the EPAO to record the presentation and questioning.

To deliver the presentation, the apprentice will have access to:

- presentation software
- videos
- interactive demonstrations
- notes
- computer
- work products

The presentation and questioning will be conducted as follows:

- The presentation will take place on a one-to-one basis between the independent assessor and the apprentice.
- The way in which the content of the presentation is delivered is not prescriptive.
- The apprentice must outline details of visual aids to be used and specify any equipment required when given notice of the presentation by the EPAO.

The independent assessor will assess the method holistically and make the grading decision based on the project report, presentation and questioning. The independent assessor will make all grading decisions.

## Venue

EPAOs must ensure that the presentation and questioning elements are conducted in a suitable, controlled environment in any of the following:

- employer's premises
- other suitable venue selected by the EPAO (for example a training provider)
- video conferencing

The venue should be a quiet room, free from distraction and external influence.

Video conferencing can also be used to conduct the presentation with questioning, but the EPAO must have processes in place to verify the identity of the apprentice and ensure the apprentice is not being aided.

Only the independent assessor will observe the presentation. A representative from the EPAO may be present when necessary for moderation purposes.

## Other relevant information

Independent assessors must be developed and trained by the EPAO in the conduct of questioning and reaching consistent judgement.

## Question and resource development

A question bank must be developed by EPAOs. The question bank must be of sufficient size to prevent predictability and the EPAO must review it regularly (at least once a year) to ensure that it, and its content, are fit for purpose. The questions relating to the underpinning KSBs, must be varied yet allow assessment of the relevant KSBs. Independent assessors must use the question bank as a source for questions and are expected to use their professional judgment to tailor those questions appropriately. Independent assessors are responsible for asking suitable questions in line with the EPAO's training and standardisation process.

EPAOs must ensure that apprentices have a different set of questions in the case of re-sits/re-takes.

EPAOs will produce the following material to support this assessment method:

- assessment specifications
- grading guidance
- question bank (for independent assessors only, not for wider distribution)
- assessment recording documentation
- guidance document for employers and apprentices on the process / timescales for the assessment as well as a description of the purpose
- guidance document for independent assessors on how to carry out the assessment

## Assessment method 2: Professional discussion underpinned by a portfolio

This assessment method has 1 component.

### Overview

This assessment will take the form of a professional discussion which must be appropriately structured to draw out the best of the apprentice's competence and excellence and cover the KSBs assigned to this assessment method. A professional discussion is a two-way discussion

which involves both the independent assessor and the apprentice actively listening and participating in a formal conversation. It gives the apprentice the opportunity to make detailed and proactive contributions to confirm their competency across the KSBs mapped to this method. It will include the questions that will assess the KSBs assigned to this assessment method and the apprentice may use their portfolio to support their responses.

The rationale for this assessment method is:

- Professional foresters are required to be competent in face-to-face discussions with clients and landowners and offer technical advice drawing on a complex analysis of data.
- It allows the apprentice to be assessed against KSBs which may not naturally occur during the project report or presentation and questioning
- It enables the apprentice to demonstrate the application of skills and behaviours as well as the knowledge that are mapped to this method.

### Delivery

The independent assessor will conduct and assess the professional discussion.

The professional discussion must last for 60 minutes. The independent assessor has the discretion to increase the time of the professional discussion by up to 10% to allow the apprentice to complete their last answer.

Independent assessors are responsible for generating suitable follow-up questions in line with the EPAO's training and standardisation process. These follow-up questions are allowed to seek clarification from the apprentice and to make a judgement against the grading descriptors.

Apprentices are expected to understand and use relevant occupational language that would be typical of a competent person in this occupation.

The professional discussion will be conducted as set out here:

- The EPAO will ensure that the independent assessor will have a minimum of five working days to review the portfolio of evidence prior to the professional discussion.
- EPAOs must make arrangements for the professional discussion with the apprentice's employer.
- Apprentices must be given at least two-weeks' notice of the date and time of the professional discussion.
- There will be a minimum of 10 questions.
- The independent assessor will ask the apprentice questions based on the knowledge, skills and behaviours identified for this method. The apprentice may use their portfolio of

evidence to exemplify a point they are discussing. The portfolio is not directly assessed

- The independent assessor may ask follow-up questions generated by themselves to probe replies further and to seek clarification on points made, these follow-up questions do not count towards the minimum question total.
- Apprentices are expected to understand and use relevant occupational language that would be typical of a competent person in this occupation.
- The independent assessor must use the assessment tools and procedures that are set by the EPAO to record the outcome of the professional discussion including KSBs met and answers to questions.
- The independent assessor will make all grading decisions.

The purpose of the questions will be to assess the following areas:

- Professional development and own performance
- Operational management
- Mensuration and survey techniques
- Legislation and risk assessments
- Silvicultural systems
- Financial management

Video conferencing can be used to conduct the professional discussion, but the EPAO must have processes in place to verify the identity of the apprentice and ensure the apprentice is not being aided in some way. The apprentice and the independent assessor should have access to the apprentice's portfolio during the professional discussion.

The independent assessor must use the assessment tools and procedures that are set by the EPAO to record the outcome of the professional discussion including KSBs met and answers to questions.

The independent assessor will make all grading decisions.

## Venue

The professional discussion should take place in a quiet room, free from distractions and influence.

The professional discussion can take place in any of the following:

- employer's premises
- a suitable venue selected by the EPAO (for example a training provider's premises)

- via video conferencing

## Question and resource development

Independent assessors are responsible for generating suitable follow-up questions in line with the EPAO's training and standardisation process. A question bank must be developed by EPAOs. Independent assessors must use the question bank as a source for questioning and are expected to use their professional judgment to tailor those questions appropriately. The question bank must be of sufficient size to prevent predictability and the EPAO must review it regularly (at least once a year) to ensure that it, and its content, are fit for purpose. The questions relating to the underpinning KSBs, must be varied yet allow assessment of the relevant KSBs.

EPAOs must ensure that apprentices have a different set of questions in the case of re-sits or re-takes.

EPAOs will produce the following material to support this assessment method:

- structured specification
- assessment recording documentation
- guidance for apprentices and employers
- grading guidance
- marking materials
- confidentiality guidance and documentation

## Reasonable adjustments

The EPAO must have in place clear and fair arrangements for making reasonable adjustments to the assessment methods for the EPA for this apprenticeship standard. This should include how an apprentice qualifies for reasonable adjustment and what reasonable adjustments will be made. The adjustments must maintain the validity, reliability and integrity of the assessment methods outlined in this EPA plan.

## Overall EPA grading

All assessment methods are weighted equally in their contribution to the overall EPA grade.

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

Independent assessors must individually grade each assessment method, according to the requirements set out in this plan.

EPAOs must combine the individual assessment method grades to determine the overall EPA grade.

Apprentices who fail one or more assessment method will be awarded an overall EPA 'fail'.

In order to gain an overall EPA 'pass', apprentices must achieve a pass in all the assessment methods.

In order to achieve an overall EPA distinction, apprentices must achieve a distinction in both assessment methods.

Grades from individual assessment methods should be combined in the following way to determine the grade of the EPA as a whole:

<b>Project Report and Presentation with questioning</b>	<b>Professional discussion underpinned by a portfolio</b>	<b>Overall grading</b>
Fail	Any grade	Fail
Any grade	Fail	Fail
Pass	Pass	Pass
Pass	Distinction	Pass
Distinction	Pass	Pass
Distinction	Distinction	Distinction

Any grade = fail, pass, distinction

## Grading Descriptors

### End-point assessment method 1: Project report and presentation with questioning

Fail – Does not meet Pass Criteria

KSBs	Pass – All of the following must be achieved to gain a pass:	Distinction – must achieve all pass criteria and all of the following:
Stakeholder engagement and relationship management K12, K16, S10, B2	Uses a variety of techniques to establish and manage positive stakeholder relationships aligned to business objectives, justifying the response to stakeholder views in the plan. Uses techniques for managing relationships (for example, colleagues, volunteers and contractors) and explains the principles for effective people management. Ensures communication is tailored to the needs and sensitivities of the audience as well as business needs (K12, K16, S10, B2)	Critically evaluates the effectiveness of stakeholder engagement strategies employed and suggests improvements. Critically analyses the principles of leadership, motivating others and resolving conflict and their relevance to different scenarios. (K12, K16, S10)
Developing a woodland management/creation plan K1, K4, K5, S2, S4, S6, S9	Creates a clear and well-structured woodland management/creation plan using accurate terminology and appropriate tools and templates. Develops logical arguments and ideas supported by credible and relevant sources, examples and data. Plan complies with the UK Forestry Standard (UKFS), the UK Woodland Assurance Standard (UKWAS) and the Forestry Act 1967. (K1, K4, K5, S6)  Creates accurate maps, using paper and digital formats, to represent forestry / woodland sites to support	Justifies woodland management decisions using visual aids. (S2)  Critically analyses and synthesises information, data and examples, structuring and communicating arguments, concepts and ideas fluently and persuasively. (S6, S9)

	<p>the plan. Makes effective and appropriate use of digital technology for desk-based surveys. (S2, S4)</p> <p>Communicates effectively using a variety of methods. (S9)</p>	
<p>Silvicultural systems K6, S11, S12</p>	<p>Takes into account the factors affecting tree growth and woodland condition when selecting species and silvicultural systems appropriate to management objectives.(K6, S12)</p> <p>Demonstrates use of appropriate decision support tools. Justifies selection and applications appropriate to the task. (S11)</p>	<p>Critically analyses options for species selection and silvicultural systems evaluating differing outcomes appropriate to site and client objectives. (K6, S12)</p>
<p>Technical analysis K7, S3, S15</p>	<p>Identifies, classifies and prioritises legislative, regulatory, best practice and locally relevant site information and data for woodland management planning and creation to include both site and desk-based research. (S3)</p> <p>Analyse, evaluate and collate data using interpretation techniques to inform woodland management and creation decisions and make recommendations. (K7, S15)</p>	<p>Critically analyses and interprets research for differing management / creation options to support creation of scenarios (K7, S3, S15).</p>

## End-point assessment method 2: Professional Discussion underpinned by a portfolio

Fail – Does not meet Pass Criteria

KSBs	Pass – All of the following must be achieved to gain a pass:	Distinction – must achieve all pass criteria and all of the following:
Professional development and own performance K15, S16, S19, B1, B3	<p>Explains how they establish, develop and maintain effective information networks and the impact this has on their organisation. Evaluates the importance of acting with integrity and professionalism at all times and the potential consequences of not doing so. Explains how they provide a high standard of service. (S16, B1, B3).</p> <p>Takes responsibility for managing their own performance and ensuring they update their silvicultural knowledge, evidencing how they do this rigorously and systematically. (K15, S19)</p>	Demonstrates a strong commitment to improving performance detailing how they have modified or developed skills and behaviours, evaluating the impact this has had (K15, S19).
Operational management K22, K23, S1, S7	<p>Evidences how they plan, manage and evaluate onsite operations, analysing the factors that need to be taken into account and explaining how this is compliant with regulatory requirements, UKFS and industry standards. (K22, S7)</p> <p>Justifies the selection of tools employed to navigate to work sites. (S1)</p> <p>Evaluates safe and effective methods for timber handling, storage, hauling and roading. (K23)</p>	Critically evaluates how they have used operational assessments to improve the management of onsite operations and the impact on efficiency, safety or both. (K22, K23, S7)

<p>Mensuration and survey techniques K2, K9, S5</p>	<p>Describes a situation that required further survey and assessment and justifies the techniques they used, evaluating the outcome. (K2, S5)</p> <p>Explains how they have used a range of different mensuration techniques, explaining how they applied and recorded them accurately and methodically and justifying why each was appropriate to the situation. (K9, S5).</p>	<p>Assesses measurement techniques and actions to improve accuracy and work rate. (K9, S5)</p>
<p>Legislation and risk assessments K3, K17, K20, K21, S13, S14, B4, B5</p>	<p>Evaluates how all relevant legislation and regulations for both forestry and wider land use, affect forestry practice. (K3, K17)</p> <p>Keeps records and issues clear instructions to manage risks on site. Writes dynamic risk assessments that are clear, relevant to the specific task and communicate effectively to operators the actions they should take. (K20, S14)</p> <p>Demonstrates how they actively promote a safety culture within the organisation. (B4)</p> <p>Mitigates environmental impact when planning and ensures operational plans are followed. Evaluates how to promote and enhance sustainable working practices and act in accordance with the best principles for biosecurity and the mitigation of environmental harm. (S13, B5)</p> <p>Evaluates the factors affecting the planning, management and mitigation of risk and plans work</p>	<p>Critically evaluates how to promote and enhance sustainable working practices. (S13, B5)</p> <p>Demonstrates a proactive approach to risk assessment and mitigation and evaluates the potential impact on people, environment and business reputation of not following best practice. (K3, K17, K20, K21, S13, S14)</p>

	considering safety and environmental compliance. (K21)	
Silvicultural systems K8, K11, K13, S8	Explains how woodland management and creation silvicultural systems affect carbon flows including carbon modelling and accounting, sequestration and climate change mitigation. Appraises silvicultural systems including appropriateness to varied site and client objectives. Identifies and evaluates management opportunities and constraints for a specific woodland creation site and formulates, selects and justifies decisions. Develops complex silvicultural models including regulatory requirements, effects of land use change and site suitability and species / provenance / stock selection and ecology. (K8, K11, K13, S8)	Critically evaluates management opportunities and constraints for a specific woodland creation site. (K11, S8)
Financial management K10, K14, K18, K19, S17, S18	Creates and manages potential income and expenditure models for woodland management and/or creation objectives including carbon markets, utilising forest industry business and market requirements, and sector intelligence. (K10, K14, S17)  Explains how they plan, resource and procure forest works in line with UKFS requirements and guidance and business needs; create and manage budgets, and financial and contractual documents. (K18, K19, S18)	Critically evaluates and presents options for valuation and economic appraisal showing differing outcomes appropriate to site and client objectives (K10, S17).

## Re-sits and re-takes

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

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

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

The timescales for a re-sit/re-take are agreed between the employer and EPAO. A re-sit is typically taken within 2 months of the EPA outcome notification. The timescale for a re-take is dependent on how much re-training is required and is typically taken within 4 months of the EPA outcome notification. All assessment methods must be taken within a 6-month period of each other otherwise the entire EPA will need to be re-sat/re-taken. If the apprentice fails the project and presentation, subject to feedback, they will have to rework the original project, rather than a new project be set, and may resubmit with changes as a re-sit/re-take.

Apprentices will have 4 weeks to complete and submit the resit/retake project and presentation materials, with the EPAO having 2 weeks to review the materials before facilitating the presentation. The feedback can advise an apprentice on the area(s) failed in the EPA, but not advise what they need to do to overcome it in a re-sit or re-take.

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

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

## Roles and responsibilities

Role	Responsibility
Apprentice	<p>As a minimum, apprentices should:</p> <ul style="list-style-type: none"> <li>• participate in and complete on-programme training to meet the KSBs as outlined in the occupational standard for a minimum of 12 months</li> <li>• undertake 20% off-the-job training as arranged by the employer and training provider</li> <li>• understand the purpose and importance of EPA</li> <li>• undertake the EPA including meeting all gateway requirements</li> </ul>
Employer	<p>As a minimum, employers should:</p> <ul style="list-style-type: none"> <li>• select the EPAO and training provider</li> <li>• work with the training provider (where applicable) to support the apprentice in the workplace and to provide the opportunities for the apprentice to develop the KSBs</li> <li>• arrange and support a minimum of 20% off-the-job training to be undertaken by the apprentice</li> <li>• decide when the apprentice is working at or above the occupational standard and so is ready for EPA</li> <li>• ensure that all supporting evidence required at the gateway is submitted in accordance with this EPA plan</li> <li>• remain independent from the delivery of the EPA</li> <li>• confirm arrangements with the EPAO for the EPA (who, when, where) in a timely manner (including providing access to any employer-specific documentation as required, for example company policies)</li> <li>• ensure that the EPA is scheduled with the EPAO for a date and time which allow appropriate opportunity for the KSBs to be met</li> <li>• ensure the apprentice is well prepared for the EPA</li> </ul>

	<ul style="list-style-type: none"> <li>• ensure the apprentice is given sufficient time away from regular duties to prepare for and complete all post-gateway elements of the EPA, and that any required supervision during this time (as stated within this EPA plan) is in place</li> <li>• where the apprentice is assessed in the workplace, ensure that the apprentice has access to the resources used on a daily basis</li> <li>• pass the certificate to the apprentice</li> </ul>
EPAO	<p>As a minimum, EPAOs should:</p> <ul style="list-style-type: none"> <li>• conform to the requirements of this EPA plan and deliver its requirements in a timely manner</li> <li>• conform to the requirements of the Register of End-Point Assessment Organisations (RoEPAO)</li> <li>• conform to the requirements of the external quality assurance provider (EQAP) for this apprenticeship standard</li> <li>• understand the occupational standard</li> <li>• make all necessary contractual arrangements, including agreeing the price of the EPA</li> <li>• develop and produce assessment materials including specifications and marking materials (for example mark schemes, practice materials, training material)</li> <li>• appoint suitably qualified and competent independent assessors</li> <li>• appoint administrators (and invigilators where required) to administer the EPA as appropriate</li> <li>• provide training for independent assessors in terms of good assessment practice, operating the assessment tools and grading</li> <li>• provide adequate information, advice and guidance documentation to enable apprentices, employers and training providers to prepare for the EPA</li> </ul>

	<ul style="list-style-type: none"> <li>• arrange for the EPA to take place, in consultation with the employer</li> <li>• where the apprentice is not assessed in the workplace, ensure that the apprentice has access to the required resources and liaise with the employer to agree this if necessary</li> <li>• develop and provide appropriate assessment recording documentation to ensure a clear and auditable process is in place for providing assessment decisions and feedback to all relevant stakeholders</li> <li>• have no direct connection with the apprentice, their employer or training provider. In all instances, including when the EPAO is the training provider (i.e. HEI), there must be no conflict of interest</li> <li>• have policies and procedures for internal quality assurance (IQA), and maintain records of regular and robust IQA activity and moderation for external quality assurance (EQA) purposes</li> <li>• deliver induction training for independent assessors, and for invigilators and/or markers (where used)</li> <li>• undertake standardisation activity on this apprenticeship standard for all independent assessors before they conduct an EPA for the first time, if the EPA is updated and periodically as appropriate (a minimum of annually)</li> <li>• manage invigilation of apprentices in order to maintain security of the assessment in line with the EPAO's malpractice policy</li> <li>• verify the identity of the apprentice being assessed</li> <li>• use language in the development and delivery of the EPA that is appropriate to the level of the occupational standard</li> <li>• provide details of the independent assessor's name and contact details to the employer</li> <li>• have and apply appropriately an EPA appeals process</li> <li>• request certification via the Apprenticeship Service upon successful achievement of the EPA</li> </ul>
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Independent assessor	<p>As a minimum, independent assessors should:</p> <ul style="list-style-type: none"> <li>• have the competence to assess the apprentice at this level and hold any required qualifications and experience in line with the requirements of the independent assessor as detailed in the IQA section of this EPA plan</li> <li>• understand the occupational standard and the requirements of this EPA</li> <li>• have, maintain and be able to evidence up-to-date knowledge and expertise of the subject matter</li> <li>• deliver the end-point assessment in-line with the EPA plan</li> <li>• comply with the IQA requirements of the EPAO</li> <li>• have no direct connection or conflict of interest with the apprentice, their employer or training provider; in all instances, including when the EPAO is the training provider (i.e. HEI)</li> <li>• attend induction training</li> <li>• attend standardisation events when they begin working for the EPAO, before they conduct an EPA for the first time and a minimum of annually on this apprenticeship standard</li> <li>• assess each assessment method, as determined by the EPA plan, and without extending the EPA unnecessarily</li> <li>• assess against the KSBs assigned to each assessment method, as shown in the mapping of assessment methods and as determined by the EPAO, and without extending the EPA unnecessarily</li> <li>• make all grading decisions</li> <li>• record and report all assessment outcome decisions, for each apprentice, following instructions and using assessment recording documentation provided by the EPAO, in a timely manner</li> <li>• use language in the development and delivery of the EPA that is appropriate to the level of the occupational standard</li> </ul>
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	<ul style="list-style-type: none"> <li>• mark open (constructed) test answers accurately according to the EPAO's mark scheme and procedures</li> </ul>
Training provider	<p>As a minimum, training providers should:</p> <ul style="list-style-type: none"> <li>• work with the employer and support the apprentice during the off-the-job training to provide the opportunities to develop the knowledge, skills and behaviours as listed in the occupational standard</li> <li>• conduct training covering any knowledge, skill or behaviour requirement agreed as part of the Commitment Statement (often known as the Individual Learning Plan).</li> <li>• monitor the apprentice's progress during any training provider led on-programme learning</li> <li>• advise the employer, upon request, on the apprentice's readiness for EPA</li> <li>• remain independent from delivery of the EPA. Where the training provider is the EPA (i.e. a HEI) there must be procedures in place to mitigate against any conflict of interest</li> </ul>

## Internal Quality Assurance (IQA)

Internal quality assurance refers to the strategies, policies and procedures that EPAOs must have in place to ensure valid, consistent and reliable end-point assessment decisions. EPAOs for this EPA must adhere to all requirements within the Roles and Responsibilities section and:

- have effective and rigorous quality assurance systems and procedures that ensure fair, reliable and consistent assessment across employers, places, times and independent assessors
- appoint independent assessors who have recent relevant experience of the occupation/sector gained in the last 3 years or significant experience of the occupation/sector
- appoint independent assessors who are chartered members of the Institute of Foresters.
- Assessors should have sufficient 'occupational competence' to ensure an up-to-date working knowledge and experience of the competencies which the organisation expects applicants to have.
- operate induction training for independent assessors, markers and invigilators
- provide training for independent assessors in terms of good assessment practice, operating the assessment tools and grading
- where appropriate:
  - provide ongoing training for markers
  - provide ongoing training for invigilators
- undertake standardisation activity on this apprenticeship standard for all independent assessors:
  - before they conduct an EPA for the first time
  - if the EPA is updated
  - periodically as appropriate (a minimum of annually)
- conduct effective moderation of assessment decisions and grades
- conduct appeals where required, according to the EPAO's appeals procedure, reviewing and making final decisions on assessment decisions and grades

## Value for money

Affordability of the EPA will be aided by using at least some of the following practices:

- Use of technology – for example video conferencing where applicable
- Location – for example use of employer premises
- Making maximum use of each typical 7.5 hour working day
- Observation of naturally occurring evidence in the workplace

## Professional body recognition

This apprenticeship standard is designed to prepare successful apprentices to meet the requirements for registration as a Chartered Forester with Institute of Chartered Foresters

The experience gained and responsibility held by the apprentice on completion of the apprenticeship standard will either wholly or partially satisfy the requirements for registration with the professional body. For more details on the requirements and application process, please contact the professional body directly.

## Mapping of knowledge, skills and behaviours (KSBs)

### Assessment method 1: Project report and presentation with questioning

#### Knowledge

K1	Terminology used in forestry and silviculture.
K4	Forestry legislation and governance including principles of the Forestry Act (1967) and relevant amendments, UK Forestry Standard and UK Woodland Assurance standard.
K5	Sources and use of Woodland Management Plan templates and tools.
K6	The factors affecting tree growth and woodland condition including species selection.
K7	Interpretation of silvicultural data to include analysis and predictive models, for example, natural capital assessment, climate change impacts.
K12	Strategies and techniques for stakeholder engagement for example, consultations, public relations, use of media.
K16	Principles of relationship management for example volunteers, contractors or colleagues.

#### Skills

S2	Create maps to represent forestry and or woodland sites using both paper and digital formats.
S3	Identify, classify and prioritise different sources of silvicultural information and data.
S4	Use digital technology to conduct desk-based surveys.
S6	Create Woodland Management and or Creation Design Plan
S9	Communicate with others using different methods, for example digital, written, verbal, presentational (maps & sketches).
S10	Establish and manage internal and external relationships, for example contractors, media, stakeholders.
S11	Select and apply appropriate online silvicultural tool or application for task, for example, MyForest, Felling Licence Online, Ecological Site Classification Tool, ForestGales
S12	Select and apply appropriate silvicultural systems to achieve management objectives.

S15	Collate, analyse and interpret silvicultural data and make recommendations.
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## Behaviours

B2	Communicates effectively and respectfully towards clients and colleagues and takes into account cultural sensitivities and business practices.
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## Assessment method 2: Professional discussion underpinned by a portfolio

### Knowledge

K2	Survey and assessment techniques for information gathering, for example, techniques for constraints and opportunity mapping, use of LIDAR, remote sensing, satellite imagery.
K3	Legislation, industry guidelines and best practice in Health and Safety for Forestry including Health and Safety at Work Act (1974), FISA guidance, for example Managing Health and Safety in Forestry.
K8	Silvicultural techniques for woodland management, for example, selective thinning, clearfell.
K9	Manual, digital and remote silvicultural mensuration and survey techniques, for example, Blue Book, digital relascope, satellite imagery.
K10	The forest industry business and market requirements plus sector intelligence including timber and land markets and values, grant and incentive regimes, investment forestry, production forecasts.
K11	Woodland creation and forest design principles, including regulatory requirements, effects of land use change, forest resilience, species selection, ecology and use of appropriate decision support tools.
K13	Silvicultural systems in relation to carbon modelling and accounting, sequestration and climate change mitigation.

K14	Carbon markets, the Woodland Guarantee, the Woodland Carbon Code and incentives such as the Woodland Carbon Planning Grant.
K15	Techniques for management of own performance.
K17	Legislation and regulation relating to wider land use for example Public Rights of Way, Countryside Rights of Way, Town and Country Planning Act, use of UAV's, Countryside and Wildlife Act, European Protected Species, Statutory Plant Health Notices.
K18	Financial management including grant applications, budgeting, contract management, timber tenders and sales.
K19	Planning, resourcing and procurement of forest works, including seasonal and operational implications for working and impact on the environment, in line with UKFS requirements and guidance.
K20	Responsibilities in relation to risk to people including dynamic site and or operation risk assessment, lone working, safety software (for example what3words), promoting safety culture, public safety.
K21	Factors affecting the planning, management and mitigation of risk on a forest works site (Forest Works Supervisor role), for example biosecurity, pollution control, environmental factors.
K22	Operational management of establishment, maintenance, harvesting and restock sites, including roles and responsibilities of landowner, works supervisor, contractors and sub-contractors (in line with FISA guidance, UKFS and industry best practice).
K23	Safe and effective methods for timber handling, storage, haulage and roading.

## Skills

S1	Navigate to work sites using tools (for example, maps, compasses, location apps, GPS)
S5	Apply accurate mensuration and survey techniques.
S7	Produce and manage operational assessments and or schemes of work and or operational plans.
S8	Develop complex silviculture modelling scenarios including carbon balance, land use, landowner objectives, timber and or other income.
S13	Manage risks to the environment including pollution, biosecurity, habitat degradation.

S14	Identify and manage risks to self, employees, public and others using dynamic site and operational risk assessment according to FISA Guidance.
S16	Develop and maintain effective information networks.
S17	Create and manage financial models and budgets.
S18	Prepare and manage financial and contractual documents (for example, tenders, sales contracts, grant agreements).
S19	Manage, maintain and record own performance, professional development and currency of silvicultural knowledge.

## Behaviours

B1	Act with integrity, for example being open and transparent in dealing with clients and respecting their confidentiality. Take full responsibility for your actions.
B3	Act professionally, providing a high standard of service based on sound business evidence.
B4	Adopt and promote a safety culture within the organisation and act with regard to health, safety and wellbeing for self and others
B5	Embed sustainable working practices.