Associate Project Manager Trailblazer Assessment Plan

This apprenticeship has been developed to prepare an apprentice for an Associate Project Manager (Level 4) role. Typical job titles for the role might include: assistant project manager, junior project manager, associate project manager, project team member. Some organisations use 'project manager' as a generic job title.

The potential opportunities available are huge as projects can be large or small, defined and delivered within different contexts and across diverse industry sectors.

This plan has been developed by a pan-sector employer led group, with a mix of large companies, small medium enterprises (SME) and training providers.

The development of the assessment methodology has taken account of the knowledge, skills and behaviours (KSBs) acquired through the level 4 apprenticeship as an Associate Project Manager and the need for a synoptic end-point assessment.

The duration of the apprenticeship is anticipated to be typically 24 months.

Summary of assessment processes	
Preparatory assessment	
Level 2 English and Mathematics qualifications to be achieved before entry or during the apprenticeship, prior to the end-point assessment	Assessment organisation recognised by Ofqual, or equivalent
On-programme assessment	
Project management qualification recognised by the IPMA at level D or APM Project Management Qualification	Assessment organisation recognised by the IPMA or APM
End-point assessment	
Presentation supported by portfolio of evidence	Independent Assessment organisation on the RoEPAO
Professional discussion supported by portfolio of evidence	Independent Assessment organisation on the RoEPAO
Grading (pass, merit, distinction)	Independent Assessment organisation on the RoEPAO

There is a broad range of work experience, across many sectors available to project management apprentices. The IPMA Level D qualification, or APM Project Management Qualification provides the Level 4 apprentice with a cross industry recognised qualification. It has been welcomed by industry, and has been endorsed by the Employer Development Group (EDG) to continue as an integral component of the Associate Project Manager Trailblazer.

The end-point assessment is designed to enable apprentices to demonstrate that they are fully conversant in the skills, knowledge and behaviours expected of individuals at this level. It is designed to provide assessors with a holistic view of the apprentice, and to allow them to assess to what extent the apprentice meets or exceeds the apprenticeship standard.

End-point assessment overview

Assessment method	Area assessed	Assessed by	Grading	Weighting
Presentation supported by a portfolio of evidence (to be submitted prior to the end point assessment).	To complement assessment of the evidence in the portfolio of evidence.	RoEPAO assessment organisation.	Marked out of 25; 5 points for each of 5 learning areas, counts towards final grade of pass, merit or distinction.	33.3%
Professional discussion supported by a portfolio of evidence (to be submitted prior to the end point assessment)	Professional discussion - Evaluation of competence utilising the portfolio of evidence to test actual understanding and maintain a consistent evaluation of the final award. Competence across 15 out of the 17 learning areas in the trailblazer standard.	RoEPAO assessment organisation.	Marked out of 50; 5 points for each of 10 learning areas, counts towards final grade of pass, merit or distinction.	66.6%

End-point assessment content and assessment methods used

Learning Area	Knowledge	Skills	Behaviours	Assessment method
1 Governance	✓	✓		Portfolio of evidence, presentation or professional discussion
2 Stakeholder and communications management	✓	✓		Portfolio of evidence, presentation or professional discussion

3 Budgeting and cost control	✓	✓		Portfolio of evidence, presentation or professional discussion
4 Business case and benefits	✓	✓		Portfolio of evidence, presentation or professional discussion
5 Scope management	✓	✓		Portfolio of evidence, presentation or professional discussion
6 Consolidated planning	✓	✓		Portfolio of evidence, presentation or professional discussion
7 Schedule management	✓	✓		Portfolio of evidence, presentation or professional discussion
8 Risk and issue management	✓	✓		Portfolio of evidence, presentation or professional discussion
9 Contract management and procurement	✓	✓		Portfolio of evidence, presentation or professional discussion
10 Quality management	✓	✓		Portfolio of evidence, presentation or professional discussion
11 Resource management	✓	✓		Portfolio of evidence, presentation or professional discussion

12 Context	✓	✓		Portfolio of evidence, presentation or professional discussion

13 Collaboration and team work			✓	Portfolio of evidence, presentation or professional discussion
14 Leadership			✓	Portfolio of evidence, presentation or professional discussion
15 Communication			✓	Portfolio of evidence, presentation or professional discussion
16 Drive for results			✓	Portfolio of evidence, presentation or professional don
17 Integrity, ethics, compliance and professionalism			✓	Portfolio of evidence, presentation or professional discussion

Key Roles and responsibilities	
Role	Responsibilities on-programme
Employer role	• Provide support, training and direction to the apprentice and ensure that the apprentice acquires the relevant skills, knowledge and behaviours • Ensure that the apprentice operates in a safe and supportive environment • Ensure that the apprentice receives regular reviews and that these are recorded to gather evidence of progress and achievements • Ensure that regular targets are set and reviewed to monitor progress and take action if required

Training Provider role	• Ensure that (prior to starting the apprenticeship), both employer and apprentice understand the detail of the learning journey and their respective commitments to this • Provide the agreed training content to support the apprentice's development as commissioned by the employer • Ensure that the requirements of the apprenticeship are fully reflected in the performance management process and that this is represented in the associated portfolio and ensure that any gaps are filled through their work with the apprentice • Support the apprentice throughout the learning journey, review evidence of prior learning, providing advice and guidance on learning strategies and tools that support the apprentice's progress and maximises their potential • Provide support and guidance to the employer in their delivery of the apprenticeship, providing any training if required • Ensure that consistent standards are being maintained through

	the on-programme assessment process via internal verification
Mentor role	We encourage organisations to appoint a mentor for the apprentice. The mentor will be a suitable colleague within the employing organisation. (We define mentoring as 'The learning and development partnership between somebody who has experience and somebody who wants to learn). Where applicable, the Mentor will: • Commit to the learning process by active listening and ask questions to help the apprentice to make decisions, judgements and take action • Help to develop understanding through sharing own experience and examples and support different ways of thinking by offering new perspectives • Provide additional information if requested on project management related topics • Assist the apprentice to develop self-reflective skills, providing guidance on the process of coming to conclusions, by thinking through the implications • Provide support for action planning • Advise on other development opportunities e.g. opportunities for specific coaching, training, work place training or informal learning methods •Address any additional support issues, meeting with the employer if required by the apprentice to discuss and progress any concerns

On-programme assessment

Either before or during the apprenticeship, and prior to the end point assessment, apprentices will be required to achieve Level 2 qualifications in English and Mathematics.

During the apprenticeship, apprentices will be required to gain a qualification at International Project Management Association (IPMA) Level D or APM Project Management Qualification.

End-point assessment gateway

Apprentices will be eligible to be put forward for the end-point assessment after a minimum of 12 months (the period is expected typically to vary between 18 and 24 months) provided that they have completed the on-programme assessment described above.

The gateway for this will be an evaluation discussion with the apprentice, to review the portfolio of evidence, led by the employer, which includes the training provider and mentor (where appropriate).

End-point assessment	
What	The end-point assessment will assess the full range of knowledge, skills and behaviours listed in the published standard, utilising a presentation, and a portfolio of evidence combined with a professional discussion.
How	The portfolio of evidence is a substantial written submission completed by the apprentice. It is an opportunity for the apprentice to demonstrate the skills, knowledge and behaviours required of them in their day-to-day work. Before beginning work on the portfolio, the apprentice should agree, in a meeting with their employer and mentor, the 15 learning areas (from 17) that will provide a focus for the portfolio of evidence and agree which 5 out of the 15 learning areas from the portfolio will be the focus of the presentation and which of the other 10 out of the 15 learning areas from the portfolio will be the focus of the professional discussion. This enables flexibility for on-programme development and assessment while still meeting the minimum requirements of Level 4 and recognises that apprentices may not be equally proficient in all learning areas. When planning the apprentice's work their employer should ensure that they are involved in projects with a broad enough scope to address the chosen learning areas, and that they will be able to evidence the relevant skills, knowledge and behaviours expected. It is the responsibility of the employer and the apprentice's mentor (where appropriate) to help guide the apprentice in choosing appropriate evidence for the portfolio. The training provider will provide a framework for the portfolio and provide initial guidance on how to assemble evidence. The portfolio of evidence will need to include self-assessments and achievement logs completed by the apprentice as part of regular performance management with their line manager, as well as any relevant supporting documents. To allow for panel review, the apprentice must submit the portfolio of evidence typically 2 weeks in advance of the expected date prior to their presentation and professional discussion. Panel members will review the portfolio of evidence during this period, to prepare for the professional discussion through questioning that will explore the apprentices' understanding of the chosen competence areas. The presentation and professional discussion will take a minimum of at least one hour. The portfolio of evidence will have been evaluated prior to the presentation and professional discussion, with questions developed to test the apprentices understanding. The apprentice's presentation will be based on their portfolio of

	evidence,

	for each learning area, enable them to demonstrate skills retention, and will also provide a means of ensuring that the work completed by the apprentice is their own.
Who	The panel of assessors will review the evidence submitted by the apprentice, and will conduct the presentation and interview session. The panel will comprise at least two members who may include representatives from the employer or learning provider, but must include an independent assessor from an assessment organisation on the RoEPAO that meets the internal and external quality assurance requirements of this assessment plan. The independent assessor will have the final decision on grading of this element of the end point assessment. Members from the employer or learning provider may provide guidance and clarification to the independent assessor in relation to the technical competencies demonstrated within the portfolio of evidence. The independent assessor will be responsible for the apprentice's final grading. The panel must contain members who have: - Excellent knowledge and understanding of the apprenticeship standard - The ability to contextualise the relevant work based project(s) - Current, relevant occupational knowledge and expertise, at the relevant level of the occupational area(s) they are assessing, which has been gained through "hands on" experience in the profession within the last 5 years. It will be the responsibility of the RoEPAO independent assessment organisation to ensure that the assessor it provides for the panel is suitably qualified and able to apply a consistent metric to the assessment and meet the quality assurance requirements in this assessment plan.

End-point assessment – final judgement

The final judgement about whether the apprentice has passed, and with what grade, will be made by the assessment organisation taking into account recommendations by the independent assessor.

Independence of end-point assessment

The independent end-point assessment is provided by the assessment organisation.

The assessment organisation will ensure that its assessors have no conflicts of interest in the assessment being undertaken ensuring independence of the on-programme development and assessment of the Apprentice.

The independence of the end-point assessment is assured through the use of organisations that conform to the RoEPAO due diligence, capacity and capability requirements and meet the internal and external quality assurance requirements of this assessment plan.

End-point assessment– summary of roles and responsibilities

Assessor	Role
Employer	- Will enable the apprentice to develop the evidence through the management of, and input to, relevant project(s) to complete their portfolio. - May provide context from working with the apprentice. - May contribute to the assessment of the portfolio of evidence and professional discussion.
Learning provider	- May provide advice to the employer. - May mentor the apprentice in support of their end-point assessment. - May provide advice or guidance to the apprentice in preparing the portfolio and professional discussion, but shall not assist with the final end-point assessment of them.
Assessment organisation	- Will provide suitably qualified and competent assessors. - Will assess the presentation and the professional discussion supported by a portfolio of evidence. - Will finalise the award and claim the apprenticeship certificate.

Quality assurance of assessment internal

The assessment organisation will assure the quality of assessment using a range of internal quality assurance processes i.e. standardisation, cross-moderation, independent re-assessment and comparisons of assessor decisions.

The Assessment organisation will run a standardisation meeting for all assessors both initially and then at 6 month intervals. The standardisation meeting exercises will involve all the assessors marking the same assessment evidence e.g. written submissions and videos of presentations and discussions and standardising their assessment decisions.

The internal quality assurance will be achieved by an independent quality assurer (IQA) sampling each independent assessor's allocation. This assessment sampling will be risk based and will cover all candidate cohorts, assessment location and assessors for up to

100% of assessments.

The IQA will investigate any assessment anomalies and risks and report these to the assessment organisation.

Assessment organisations will need to demonstrate their capability to deliver internal quality assurance.

This includes but is not limited to:

• Managing the training and professional development of assessors and internal quality assurers.

• Monitoring assessor practice and decisions.

• Managing standardisation and internal quality assurance activities and decisions.

• Providing a compliant complaints and appeals procedure.

• Providing comparability and consistency of assessment decisions.

• Managing the improvement of quality of assessment practice.

• Managing and quality assuring any assessment delivered by sub-contractors.

• Providing regular risk based reports of the internal quality assurance of assessment.

Quality assurance of end-point assessment – external

External Quality assurance will be carried out by the Institute for Apprenticeships

End-point assessment - Grading

The five-point rating scale shown below will be used in all components of the end-point assessment.

In this rating scale, meeting the standard implies meeting the relevant knowledge, skills and/or behavioural requirements for the specific work function.

End-Point assessment scoring

1	2	3	4	5
Significant Gaps in the apprentice's ability to meet the standard	Minor gaps in the apprentice's ability	Apprentice fully meets the standard	Apprentice fully meets the standard in all areas	Apprentice consistently exceeds the standard in most areas

Presentation Scoring

1	2	3	4	5
Significant Gaps in the apprentice's ability to meet the standard	Minor gaps in the apprentice's ability	Apprentice fully meets the standard	Apprentice fully meets the standard in all areas	Apprentice consistently exceeds the standard in most areas

- For the presentation supported by a portfolio of evidence, each of the 5 learning areas selected for assessment will be scored out of 5, and then each score will be added together to give a total score out of 25.

Professional Discussion Scoring

1	2	3	4	5
Significant Gaps in the apprentice's ability to meet the standard	Minor gaps in the apprentice's ability	Apprentice fully meets the standard	Apprentice fully meets the standard in all areas	Apprentice consistently exceeds the standard in most areas

- For the professional discussion supported by a portfolio of evidence, each of the 10 learning areas selected for assessment will be scored out of 5, to give a total score out of 50.

The total scores for both the presentation (25) and the professional discussion (50) will be added together to give an overall total score out of 75.

End Point Assessment Grading

For an apprentice to fully meet the standard they must achieve a minimum score of 45 out of 75 (60%)

The apprentice's final grade will be determined according to the following: Scores are out of 75.
- Pass: total of the scores from all components in the range 45 to 55
- Merit: total of the scores from all components in the range from 56 to 65
- Distinction: total of the scores from all components in the range 66 to 75

Affordability	Costing has been calculated using a range of providers who use a variety of delivery methods. The end point assessment is estimated to be no more than 20% of the total cost.
	The total cost has been discussed with the EDG to provide assurance of affordability for all organisations, in particular for small and medium enterprises.

Professional body recognition	APM have agreed that Apprentices may become Student Members of the APM at the start of their apprenticeship. Apprentices may also be able to apply for professional status with any other relevant professional body. Successful apprentices can become Associate members of APM and those who have completed the IPMA Level D qualification will be able to complete the registration with the IPMA as a Level D holder,
Consistency	Consistency of the requirements to evaluate a specific grade in the end-point assessment will be assured by the internal and external quality assurance processes detailed within this assessment plan.
Volumes	The existing Higher Apprenticeship in Project Management (FR03104) was launched in June 2012 and has produced increasing demand year on year with per annum figures of 70 in 2012/13, 160 in 2013/14 and 370 in 2014/15. It is expected that numbers will exceed 400 for 2015/16. With the launch of the Project Management Trailblazer, there has been commitment to place 226 on to the new standard in the first year. This is from employers within the EDG and includes; 10 from Sellafield Ltd; 40 from London Major Programmes Apprenticeship; 20 from Arcadis; 67 from the Cabinet Office on behalf of HM Government; 45 from BAE Systems; 10 from Rolls Royce; 30 from Lloyds Banking Group and 4 from n:gaged (SME). It can therefore be concluded that there is significant interest which has already translated into volume commitment. We can expect, based upon the success of the existing framework, for this to increase once the new standard has been approved, launched and communicated.

Annexes

1. Typical Apprenticeship Timeline
2. Mapping of Learning Areas

Annex 1: Typical Apprenticeship Timeline

Typical Apprenticeship Timeline	
Indicative Timescale	**Process**
1-3 months after commencement	Apprentice induction into the programme. Employer, learning provider and apprentice discuss and agree expectations, format and discuss portfolio of evidence with apprentice. Employer and learning provider. Initial performance expectations are documented and a work plan is outlined for the apprentice.
3-4 months after commencement	Employer and learning provider review portfolio of evidence with apprentice. Target grades to date are recorded and gaps identified for improvement.
4-7 months after commencement	Employer and learning provider review portfolio of evidence with apprentice.
7-8 months after commencement	Employer and learning provider review portfolio of evidence with apprentice. Learning provider begins to test knowledge in preparation for IPMA Level D or APM Project Management qualification. Target grades to date are recorded and gaps identified for improvement.
8-12 months after commencement	Employer and learning provider review portfolio of evidence with apprentice.
12-14 months after commencement	Employer and learning provider review portfolio of evidence with apprentice. Completion of IPMA Level D or APM Project Management Qualification and award. Employer and apprentice complete an annual review and evaluation to assure apprentice performance is on track. Targets are recorded and gaps identified.

14-16 months after commencement	Employer and learning provider review portfolio of evidence with apprentice. Employer and apprentice discussed potential areas of focus in portfolio of evidence. Apprentice can re-sit for IPMA Level D or APM Project Management Qualification (as necessary).
16-18 months after commencement	Employer and learning provider review portfolio of evidence with apprentice. Employer and learning provider and apprentice discuss preparations for end point assessment.
18-23 months after commencement	Apprentice organises portfolio of evidence for end-point assessment with guidance from employer and learning provider. Employer and apprentice discuss opportunities for knowledge and understanding in preparation for presentation and professional discussion. Employer and apprentice identify opportunities for improvement. Employer and learning provider arranges for end-point assessment including submission of portfolio of evidence, presentation and professional discussion.
23-24 months after commencement	Apprentice portfolio of evidence is submitted to the assessment panel. Apprentices complete presentation and professional discussion. Employer and apprentice discuss employability and continuous development. Apprentice learning record updated.
24 Months	Completion and Award of Apprenticeship Certificate.

Annex 2: Mapping of Learning Areas

Mapping of Learning Areas	
Learning Area	**Outcome**
1 Governance	**Knowledge**: Policies, regulations, functions, processes, procedures, reporting and responsibilities. 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. **Skills**: Project monitoring and reporting cycle to track, assess and interpret performance by the application of progress monitoring techniques to analyse status and manage information flows.
2 Stakeholder and communications management	**Knowledge**: 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 communications. **Skills**: Managing 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.
3 Budgeting and cost control	**Knowledge**: 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; structures alternative cost breakdowns to provide graphical representations and performance management. **Skills**: Develop and agree budgets for projects, monitoring forecast and actual costs against them and controlling changes. Support funding submissions. Tracking systems for actual costs, accruals and committed costs; structures for alternative cost breakdowns.
4 Business case and benefits	**Knowledge**: How required outcomes will be delivered to meet the business case. **Skills**: Contribute to the preparation or maintenance of a business case including achieving required outcomes.
5 Scope management	**Knowledge**: Requirements management and evaluation of alternative methods to learn from the past to improve delivery. Change control of project scope and management of baseline changes; applying configuration management. **Skills**: Determine, control and manage changes to the scope of a project, including assumptions, dependencies and constraints.

6 Consolidated planning	**Knowledge**: Purpose and formats for consolidated plans to support overall management, taking account of previous lessons learnt and how these plans balance the fundamental components of scope, schedule, resources, budgets, risks and quality requirements. **Skills**: Consolidate and document the fundamental components of projects. Monitors progress against the consolidated plan and refines as appropriate, implementing the change control process where relevant.
7 Schedule management	**Knowledge**: Scheduling and estimating for project activities including how they can be quality assessed. Progress monitoring and metrics to assess work performed against the schedules. Schedule management methods to evaluate and revise activities to improve confidence in delivery. **Skills**: Prepare and maintain schedules for project activities aligned to project delivery.
8 Risk and issue management	**Knowledge**: The need for and implementation of a risk management plan. Risk management methods and techniques to identify and prioritise threats or opportunities, establish appropriate mitigation actions to minimise risk impacts and optimise opportunities. **Skills**: Identify and monitor project risk plan and implement responses to them, contribute to a risk management plan. Respond to and manage issues within a defined governance structure.
9 Contract management and procurement	**Knowledge**: Nature of contracts and the implications for the contracting organisations; a procurement process, the legal and ethical means for managing contracts. **Skills**: Contribute to a procurement process, contribute to the definition of contractual agreements and contribute to managing a contract.
10 Quality management	**Knowledge**: Quality management processes, assurance and improvements. Outcomes of a quality management plan, metrics for processes and quality standards. **Skills**: Contribute to the development of a quality management plan, manage project assurance, and contribute to project peer reviews. Utilise an organisation's continual improvement process including lessons learned.

11 Resource management	**Knowledge**: Resource analysis, allocation and commitment acceptance. **Skills**: Develop resource management plans for project activities, acquire and manage resources including commitment acceptance, monitor progress against plans.
12 Context	**Knowledge**: The different contexts in which projects can be delivered, including health, safety, and environmental management. The interdependencies between project(s), programme(s) and portfolio management. Phases within the project and key review points, across project life cycles. **Skills**: Apply project management skills in the context of their organisation.
13 Collaboration and team work	**Behaviour**: Understands and is effective in their role as part of an integrated team.
14 Leadership	**Knowledge**: The vision, values and objectives of the project and its links to strategic 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. The characteristics of the working environment which encourages and sustains high performance. **Behaviour**: Communicates direction, and supports the vision for project delivery.
15 Communication	**Behaviour**: Working effectively with and influencing others, taking account of diversity and equality.
16 Drive for results	**Behaviour**: Demonstrates a clear commitment to achieving results, and improving performance.
17 Integrity, ethics, compliance and professionalism	**Behaviour**: Promote the wider public good in all actions, acting in a morally, legally and socially appropriate manner. Promotes and models the highest standards of professional conduct, ethics and trust.