# Standard Assessment Specification
## Level 4 Associate Project Manager

## Change control

Innovate Awarding will continuously review all support material to ensure its accuracy. All amendments will be recorded on the below change control table. New and updated support material will be listed on the dashboard section of EPA Pro. Please ensure that you are using the most up-to-date version. Any enquiries about this process can be directed to EPA@innovateawarding.org

| Version number | Date uploaded | Overall grade | Page affected |
|---|---|---|---|
| V4 | 27/11/2020 | The presentation timing has now been changed from 1 hour to 30 minutes and the professional discussion has changed to 'approximately an hour' from a minimum of an hour. This is to meet a better delivery for learners. | 7 |
| V5 | 09/04/2021 | K6 changed from 'Evaluate the significance of the project management plan (PMP) on own projects' to 'Evaluate the significance of the project communication plan (PCP) on own projects' | 10 |

## Disclaimer note

Information made accessible through this document is as provided from the current published standard and assessment plan.

Guidance throughout our specification will be subject to final amends once there is an updated published standard and assessment plan.

# Contents

# Introduction

## Innovate Awarding

Innovate Awarding is an End-point Assessment Organisation approved by the Education and Skills Funding Agency (ESFA) and a nationally regulated Awarding Organisation with a collaborative approach to doing business. We work with employers and training providers to deliver fit for purpose End-point Assessment and qualification services in a number of sectors. For further information, please see our website, www.innovateawarding.org/apprenticeship-standards/end-point-assessment.

# Apprenticeship overview

The Associate Project Manager apprenticeship is designed to provide the knowledge, skills and behaviours required by those working in and supporting individuals in project management.

| Standard Name | Operations / Departmental Manager |
|---|---|
| Level | 4 |
| Sector | Project Management |
| Programme duration | 18 to 24 months |
| Minimum time on programme | 12 months |
| EPA Duration | 3 months |
| EPA Methods | • Presentation supported by portfolio of evidence<br>• Professional discussion supported by portfolio of evidence |
| Outcomes | Fail, Pass, Merit, Distinction |
| External Quality Assuring Centre | Institute for Apprenticeships |

## Who is the apprenticeship for?
The apprentice is for people working in a range of roles, including: assistant project manager, junior project manager, associate project manager and project team member.

## Role of Innovate Awarding
Innovate Awarding is the End-point Assessment organisation which will complete all aspects of the End-point Assessment requirements for the apprenticeship. Innovate Awarding will provide information on the processes that enable employers and training providers to support the apprentice to achieve the End-point Assessment.

**Support materials**
Support materials provided include:
•     Guides for assessment methods
•     Assessment specifications
•     Assessment manual
•     Full mock documentation
•     Exemplar assessments
•     Videos of assessments

# On Programme Requirements

The on-programme learning and development will be agreed between the training provider and employer or internally if training is delivered by an employer-training provider. At the beginning of the apprentice's on-programme development, the apprentice must select which of the 15 modules (from the 17 included in the standard) they will be completing for their apprenticeship programme.

For this standard, the following are mandated:

•     completion of Level 2 Literacy and Numeracy;
•     completion of a qualification at International Project Management Associate (IPMA) Level D or APM Project Management Qualification;
•     completion of a portfolio of evidence covering 15 of the 17 modules from the Associate Project Management standard;
•     select the 5 modules that will be covered by the presentation;
•     select the 10 modules that will be covered by the professional discussion.

# Gateway

To qualify for End-point Assessment, the apprentice must pass through the gateway. To do this, they need to be able to evidence:

•     completion of Level 2 Literacy and Numeracy;
•     completion of a qualification at International Project Management Associate (IPMA) Level D or APM Project Management Qualification.

The employer and training provider/employer training provider must confirm that all the requirements have been met and that the apprentice is ready to complete the End-point Assessment before they can pass through the gateway. This will be confirmed at the gateway sign-off and documented on 'EPA Pro'. This notifies Innovate Awarding that the apprentice is ready for End-point Assessment and the End-point Assessment planning will be organised.

# Module Overview

The modules are the titles of the knowledge, skills and behaviours listed in the standard.

| Modules | Assessment Methods |
| --- | --- |
| | Portfolio of evidence and Presentation or Professional Discussion |
| Governance | ✓ |
| Stakeholder and communications management | ✓ |
| Budgeting and cost control | ✓ |
| Business case and benefits | ✓ |
| Scope management | ✓ |
| Consolidated planning | ✓ |
| Schedule management | ✓ |
| Risk and issue management | ✓ |
| Contract management and procurement | ✓ |
| Quality management | ✓ |
| Resource management | ✓ |
| Context | ✓ |
| Collaboration and team work | ✓ |
| Leadership | ✓ |
| Communication | ✓ |
| Drive for results | ✓ |
| Integrity, ethics, compliance and professionalism | ✓ |

# End-point Assessment

The End-point Assessment requires the apprentice to demonstrate that they have achieved all requirements of the apprenticeship standard.

## What will the End-point Assessment look like?
A planning meeting will take place once the gateway has been passed and the apprentice has been deemed ready for the End-point Assessment.

The purpose is to:
* plan when the assessments will take place
* identify the requirements of each assessment method
* answer any questions or concerns the apprentice may have about the assessment process
* aid in the preparation requirements for End-point assessment (e.g. arranging access, facilities and resources)

## Panel Representatives
The panel will consist of at least two members. One must be the End-point Assessor. The other may include representatives from the employer or provider. The representatives may provide guidance and clarification to the End-point Assessor however the final grading decision is determined by the End-point Assessor.
Employer/provider representatives must 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 professional within the last 5 years.

## Portfolio of evidence
The portfolio of evidence will cover the 15 modules that the apprentice has selected to complete for their apprenticeship. The portfolio of evidence will be completed during the apprentices on-programme element. The portfolio will be submitted at the gateway review to allow time for review by the assessment panel. The portfolio will not be assessed directly.

## Presentation supported by portfolio of evidence
The presentation must be scheduled at least 1 month after submission of the portfolio. The presentation will last a minimum of 30 minutes and will cover the 5 modules that the apprentice elected to cover at the beginning of their apprenticeship. The presentation will allow the apprentice to cover the learning taken place for the elected modules and demonstrate the knowledge, skills and behaviours of those modules. It will also allow the panel to ensure the work completed is the apprentice's own work.

## Professional Discussion supported by portfolio of evidence
The professional discussion must be scheduled at least 1 month after submission of the portfolio. The professional discussion will last approximately 1 hour and will cover the 10 modules that the apprentice elected to cover at the beginning of their apprenticeship. The professional discussion will test the apprentice's understanding of the portfolio and the 10 modules to be assessed within it.

# Apprenticeship Standard Amplification

**Module 1       Governance**

| Assessment criteria | | | | | |
|---|---|---|---|---|---|
| **Ref** | **Knowledge**<br>Apprentices will need to: | **Maps to standard** | **Ref** | **Skill**<br>Apprentices will need to: | **Maps to standard** |
| K1 | Illustrate the use of governance within project management | 1 | S1 | Monitor performance of projects | 1 |
| K2 | Analyse organisational structures and their relevance to different types of projects | 1 | S2 | Report on  performance of projects | 1 |
| K3 | Compare responsibilities and functions required for different types of projects | 1 | | | |
| K4 | Compare the different types of project phases | 1 | | | |
| K5 | Assess how effective governance can control and manage successful delivery of projects | 1 | | | |
| K6 | Evaluate the significance of the project management plan (PMP) on own projects | 1 | | | |

## Delivery content and guidance

| Ref | Knowledge | Maps to standard | Ref | Skill | Maps to standard |
|---|---|---|---|---|---|
| K1 | Governance includes: policies, regulations, functions, processes, procedures, reporting and responsibilities<br><br>Governance documents here could be: internal and external policies, laws and regulations, functions, processes, procedures, reporting requirements, delegations of authority and associated responsibilities | 1 | S1 | Monitoring includes: Monitor projects to track, assess and interpret performance<br><br>Monitoring techniques: Gantt chart, Critical Path Method, PERT, schedule network analysis, internal software programmes, cybernetic control, go/no control, post control, project meetings, project member one to ones/ reviews, stakeholder meetings | 1 |
| K2 | Knowledge of organisational structures includes: e.g. manufacturing, construction, management etc<br><br>Organisational structures: functional, projectized, matrix, composite | 1 | S2 | Performance of projects: reporting on the progression of projects to track, assessing and interpret performance<br><br>Reporting tools: project performance reports, monitoring reports, progression reports, stakeholder reports/updates, communication between relevant stakeholders<br><br>Project progress monitoring techniques: Gantt chart, Critical Path Method, PERT, schedule network analysis, internal software programmes | 1 |
| K3 | Responsibilities: sponsor, project manager, project team leader, project members<br><br>Management functions: planning, organising, resourcing, budgeting etc | 1 | | | |
| K4 | Project phases: conception and initiation, planning, execution, monitoring and control, closure | 1 | | | |
| K5 | Effective management: optimisation of investment, avoidance of reasons for failure, staff motivation, minimisation of risks, disciplined management of project phases, life-cycle management | 1 | | | |
| K6 | PMP: project overview, scope, deliverables, timings, costings etc | 1 | | | |

## Module 2    Stakeholder and Communications Management

| Assessment criteria | | | | | |
|---|---|---|---|---|---|
| **Ref** | **Knowledge**<br>Apprentices will need to: | **Maps to standard** | **Ref** | **Skill**<br>Apprentices will need to: | **Maps to standard** |
| K1 | Compare the perspectives of different stakeholders involved in projects | 2 | S1 | Manage stakeholders involved within projects | 2 |
| K2 | Evaluate the interests of stakeholders involved in projects | 2 | S2 | Manage conflicts and negotiations with project stakeholders | 2 |
| K3 | Describe the levels of influence of stakeholders on projects | 2 | S3 | Communicate to a variety of different audiences | 2 |
| K4 | Examine the context of a project communication plan | 2 | S4 | Contribute to negotiations relating to project objectives | 2 |
| K5 | Evaluate the effectiveness of a project communication plan in managing different stakeholders | 2 | | | |
| K6 | Evaluate the significance of the project communication plan (PCP) on own projects | 2 | | | |
| **Delivery content and guidance** | | | | | |
| **Ref** | **Knowledge** | **Maps to standard** | **Ref** | **Skill** | **Maps to standard** |
| K1, K2, K3 | Stakeholders: Any entity that has an interest in a project, including: sponsor, board, project leader, senior management, project team members, customers, line manager, sub-contractors, consultants, competition, funders, local authorities<br><br>Interests and influence: Stakeholder mapping, Power vs interest grid, Influence vs impact grid, Power vs influence grid, Importance vs influence grid, Salience model | 2 | S1 | Management of stakeholders includes adapting to the levels of influence and interest of stakeholders<br><br>Evidence examples could include: operational plans, project plans, meetings, stakeholder plans, surveys, e-mails, presentations, communications plan, witness statements, spreadsheets, project management documentation, feedback, outcomes of analytical tools<br><br>Tools that could be used to manage stakeholder includes: Stakeholder mapping, Power vs interest grid, Influence vs impact grid, Power vs influence grid, Importance vs influence grid, Salience model | 2 |

## Delivery content and guidance

| Ref | Knowledge | Maps to standard | Ref | Skill | Maps to standard |
|---|---|---|---|---|---|
| | | | S2 | Conflict and negation tools: the Tomas-Kilmann Conflict Mode Instrument (TKI), witness statements, appraisals, feedback, meetings, e-mails | 2 |
| K4 | A project communication plan: Description, Rational/Purpose, people involved, result | 2 | S3 | Communications include: meetings, presentations, webinars, e-mail, reports, intranet, social media etc | 2 |
| K5 | Factors that could impacting on communication: Use of technical jargon, emotional barriers, lack of interest/attention/distraction, perception and viewpoint, physical disabilities, physical barriers to non-verbal communication, language, expectations and prejudices, cultural differences, conflicts of interest, face to face or remote/distant communication | 2 | S4 | Contributions include: meetings, minutes, reports, e-mail, video conferencing, webinars, project documentation | 2 |
| K6 | Factors such as cultural and physical barriers | 2 | | | |

## Module 3    Budgeting and Cost Control

| Assessment criteria | | | | | |
|---|---|---|---|---|---|
| **Ref** | **Knowledge**<br>Apprentices will need to: | **Maps to standard** | **Ref** | **Skill**<br>Apprentices will need to: | **Maps to standard** |
| K1 | Detail funding and overhead considerations for projects throughout their lifecycle | 3 | S1 | Develop and agree budgets for projects | 3 |
| K2 | Explain how estimation is used through the project lifecycle | 3 | S2 | Monitor forecasted and actual costs against budgets and control changes | 3 |
| K3 | Describe how budgeted project costs are tracked | 3 | S3 | Use tracking systems to monitor budgets | 3 |
| K4 | Illustrate how alternative cost breakdowns are used to provide graphical representations, and performance management | 3 | S4 | Support funding submissions for projects | 3 |

## Delivery content and guidance

| Ref | Knowledge | Maps to standard | Ref | Skill | Maps to standard |
|---|---|---|---|---|---|
| K1 | Considerations: project start up/initiation, individual project tasks, resourcing etc | 3 | S1 | Agreeing budget considerations: the difference between business funding, bank lending, grant funding etc. The should be able to apply them differently within the budget and returns ,as well as understand the restrictions that funding brings to the delivery of projects ie clawback, the application of bottom up estimating, comparative and parametric estimating and three-point estimation | 3 |
| K2 | Estimation of: costs, meetings, minutes, spreadsheets, business plans, bank statements, presentations, accounting documents, forecasts, funding submissions, audits, post project reviews benefit realisation and cashflow forecasting explaining the different types of cost in context of a project | 3 | S2 | Forecasting and actual costs: researching costs, meetings, minutes, spreadsheets, business plans, bank statements, presentations, accounting documents, forecasts, funding submissions, audits, post project reviews benefit realisation and cashflow forecasting explaining the different types of cost in context of a project | 3 |
| K3 | Costs include: Direct costs, indirect costs, fixed costs, variable costs, actual costs<br><br>Budget: an estimation of income and expenditure for a set period.  Processes could include – monitoring, control, recording, minimising costs in own area of responsibility, reviewing performance,<br><br>identifying cost savings measures Identifying budget shortfalls and requesting budget change<br><br>Tracking systems: spreadsheets, project tracking applications for actual costs, accruals, committed costs, cost breakdowns to provide graphical representations and performance management | 3 | S3 | Tracking systems: documents used to identity future revenue and expenditure based on past, current and predicted financial information<br>The scope of tracking systems includes systems to track: actual costs, accruals and committed costs, Spreadsheets and technical systems should be explained<br>Forecasting models: rule of thumb, cash budge, Delphi, Time-series forecasting<br>Apprentices should provide cost breakdowns<br>Apprentices should be able to explain and demonstrate how to calculate Earned Value Management | 3 |

## Module 4        Business Case and Benefits

| Assessment criteria | | | | | |
|---|---|---|---|---|---|
| **Ref** | **Knowledge**<br>Apprentices will need to: | **Maps to standard** | **Ref** | **Skill**<br>Apprentices will need to: | **Maps to standard** |
| K1 | Explain how to prepare a project business case | 4 | S1 | Contribute towards the development or maintenance of a business case | 4 |
| K2 | Evaluate and adjust case to meet changing requirements | 4 | | | |
| **Delivery content and guidance** | | | | | |
| **Ref** | **Knowledge** | **Maps to standard** | **Ref** | **Skill** | **Maps to standard** |
| K1 | Preparing a business case: what is the project and why does it need to be done? What are the benefits of the project? how the project will be implemented and any known resources/costs | 4 | S1 | The development or maintenance of a business case: research requirements, spreadsheets, meetings, e-mails, quotations, reports, budgets, financial calculation sheets, project documentation, documents showing expected benefits/ risks, time-lines<br><br>Business case maintenance: regular reviews against results, analysis of reasons for variance, amendments to the business case<br><br>The business case: the apprentice has ensured the outcomes have been achieved | 4 |
| K2 | Methods for achieving business case outcomes: communicating required outcomes to stakeholders, managing stakeholders to ensure achievement of outcomes, monitoring progress towards outcomes and amending activities accordingly | 4 | | | |

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## Module 5     Scope Management

| Assessment criteria | | | | | |
|---|---|---|---|---|---|
| **Ref** | **Knowledge**<br>Apprentices will need to: | **Maps to standard** | **Ref** | **Skill**<br>Apprentices will need to: | **Maps to standard** |
| K1 | Explain the use of requirement management in own organisation | 5 | S1 | Determine changes required in the scope of a project | 5 |
| K2 | Describe methods used to evaluate previous projects | 5 | S2 | Manage changes in the scope of a project | 5 |
| K3 | Explain change control, including how it is applied to changes to the project scope | 5 | | | |
| K4 | Evaluate methods of managing changes to baselines | 5 | | | |
| K5 | Analyse project configuration management, including its application | 5 | | | |

## Delivery content and guidance

| Ref | Knowledge | Maps to standard | Ref | Skill | Maps to standard |
|-----|-----------|------------------|-----|-------|------------------|
| K1 | Requirements management: The process of documenting, analysing, tracing, prioritising and agreeing on requirements and then controlling change and communicating to relevant stakeholders. It is a continuous process throughout a project | 5 | S1 | Changes required: project plans (including scoping documents), version control, spreadsheets, scope statements, documents relating to requirements, examples of communication, documents relating to estimates/budgets, timelines, use of online project management software | 5 |
| K2 | Evaluation methods: return on investment (ROI), return on assets (ROA), return on capital invested (ROCI), net present value (NPV), surveys, questionnaires, customer satisfaction, stakeholder feedback, project evaluation | 5 | S2 | Managing changes in scope: evidence of managing assumptions, dependencies and constraints and includes project plans (including scoping documents), version control, spreadsheets, scope statements, documents relating to requirements, examples of communication, documents relating to estimates/budgets, timelines, use of online project management software | 5 |
| K3 | Change control: the process through which all requests to change the baseline scope of a project, programme or portfolio are captured, evaluated and then approved, rejected or deferred | 5 | | | |
| K4 | Baselines include: schedule baseline, cost baseline, scope baseline | 5 | | | |
| K5 | Project configuration management (PCM) refers to: Collective body of processes, activities, tools and methods project practitioners can use to manage items during the project life cycle. It addresses the composition of a project, the documentation defining it, and other data supporting it | 5 | | | |

## Module 6     Consolidated Planning

| Assessment criteria | | | | | |
|---|---|---|---|---|---|
| **Ref** | **Knowledge**<br>Apprentices will need to: | **Maps to standard** | **Ref** | **Skill**<br>Apprentices will need to: | **Maps to standard** |
| K1 | Explain the purpose and formats of consolidated plans to support project management | 6 | S1 | Consolidate and document the fundamental components of projects | 6 |
| K2 | Illustrate how consolidated plans can be used to balance project components | 6 | S2 | Monitor progress against a consolidated plan | 6 |
| K3 | Describe how lessons learned can be applied when planning future projects | 6 | S3 | Refine consolidated plans, implementing change control processes, where relevant | 6 |
| **Delivery content and guidance** | | | | | |
| **Ref** | **Knowledge** | **Maps to standard** | **Ref** | **Skill** | **Maps to standard** |
| K1 | Purpose: to combine planning, application and reporting of projects<br><br>Consolidation of: lessons learnt, scope, procedures, roles and responsibilities, schedules, communication, risk log, project approval, quality requirements dependencies and opportunities | 6 | S1 | Documents: consolidated plans, minutes from meetings, witness testimony, e-mail, reports, spreadsheets | 6 |
| K2 | The apprentice must scope, schedule, resources, budgets, risks and quality requirements<br><br>Plan uses: to identify clashes in resources, timelines, cut work to fit available budget, use balance points for remaining work, cutting and adding work, optimising outcomes, considered alignment of resources and funding points vs deliverables | 6 | S2 | Progress monitoring tools: Gantt charts, critical pathway analysis, smart objectives, project plans | 6 |
| K3 | Continuous improvement: formal mechanisms for project evaluation and reporting and how this influences decision making | 6 | S3 | Refinement tools: consolidated plans, minutes from meetings, witness testimony, e-mail, reports, spreadsheets | 6 |

## Module 7        Schedule Management

| Assessment criteria | | | | | |
|---|---|---|---|---|---|
| Ref | Knowledge<br>Apprentices will need to: | Maps to standard | Ref | Skill<br>Apprentices will need to: | Maps to standard |
| K1 | Compare how scheduling and estimating tools and techniques are used in project management | 7 | S1 | Prepare schedules for project activities | 7 |
| K2 | Explain how to select appropriate metrics used to assess work performed against the schedule | 7 | S2 | Maintain schedules for project activities | 7 |
| K3 | Illustrate how progress monitoring is used to assess work performed against the schedule | 7 | | | |
| K4 | Illustrate how schedule management methods are used to evaluate and revise activities to improve confidence in delivery of a project | 7 | | | |

| Delivery content and guidance | | | | | |
|---|---|---|---|---|---|
| Ref | Knowledge | Maps to standard | Ref | Skill | Maps to standard |
| K1 | Scheduling and estimating tools: Gantt charts, Critical pathway analysis, PERT charts, work breakdown structures (WBS), schedule network analysis, planning horizon, parametric estimating, three-point estimates, bottom-up estimating | 7 | S1 | Scheduling tools: Gantt charts, critical pathway method, PERT charts, work breakdown structure (WBS), online software packages, spreadsheets | 7 |
| K2 | Metrics: goal metrics, KPIs, qualitative metrics, quantitative metrics, actionable metrics, informational metrics; metrics relating to resources, risk, quality, stakeholder engagement, cost | 7 | S2 | Maintaining schedule considerations: metrics relating to resources, risk, quality, stakeholder engagement, cost and relevant workplace metrics (qualitative and quantitative) | 7 |
| K3 | Progress monitoring: monitoring of budget, scope, schedule, resources and tasks to be completed. The monitoring of progress would be how often, how monitored and how reported | 7 | | | |
| K4 | Schedule management methods: the use of PERT and Gantt charts, review of critical, risk evaluation and resource management | 7 | | | |

## Module 8    Risk and Issue Management

| Delivery content and guidance | | | | | |
|---|---|---|---|---|---|
| Ref | Knowledge | Maps to standard | Ref | Skill | Maps to standard |
| K1 | Evaluate the need for a risk management plan | 8 | S1 | Identify and monitor a project risk or opportunity | 8 |
| K2 | Outline how to implement a risk management plan | 8 | S2 | Plan and implement responses to project risk/opportunity | 8 |
| K3 | Compare risk management methods and techniques used to identify threats and opportunities | 8 | S3 | Contribute to a risk management plan | 8 |
| K4 | Investigate mitigating actions that minimise risk and optimise opportunities | 8 | S4 | Respond to and manage project issues within the given governance structure | 8 |

| Delivery content and guidance | | | | | |
|---|---|---|---|---|---|
| Ref | Knowledge | Maps to standard | Ref | Skill | Maps to standard |
| K1 | Needs for risk management: it prepares for foreseeable risks, estimates impact, defines responses, should include likelihood of risks occurring, impact of risk, responsibilities and owners of risks, contingencies etc | 8 | S1 | Evidence examples could include an example of a project risk/opportunity plan and examples of using monitoring techniques, such as a risk register.<br><br>Evidence of the use of metrics for monitoring could also be included.<br><br>Apprentices should understand the alignment of risks to programme plan and resource / financial planning to identify potential costs mitigation plans and the reduction of risks and issues. | 8 |
| K2, K3 | Risk management plan: the steps for completing a and how this is implemented within the project. Mechanisms for implementing include ensuring buy in from senior management, raising awareness of risks with project team and ensuring that appropriate management strategies are in place<br><br>Risk management methods: Risk register, Issue log, Risk matrix, Fishbone diagram, P3 Management,  qualitative techniques (probability and impact assessment, influence diagrams and expected value calculations), quantitative techniques (Monte Carlo analysis, decision trees, sensitivity analysis) | 8 | S2 | Plan and implement responses: evidence examples could include clips of verbal communication, examples of related written communication, agendas, minutes, team feedback, witness statements, appraisals, project meetings, team meetings and other work products. | 8 |
| K4 | Mitigating actions: an action taken to minimise the impact of a risk and mitigate any issues that arise, such as contingencies and how it can be applied. | 8 | S3 | Evidence examples could include clips of verbal communication, examples of related written communication, appraisal, agendas, minutes, team feedback, witness statements, appraisals, project meetings, team meetings, team feedback and other work products | 8 |

## Module 9    Contract Management and Procurement

| Assessment criteria | | | | | |
|---|---|---|---|---|---|
| **Ref** | **Knowledge**<br>Apprentices will need to: | **Maps to standard** | **Ref** | **Skill**<br>Apprentices will need to: | **Maps to standard** |
| K1 | Explain the requirements of contracts in project management | 9 | S1 | Contribute to a procurement process | 9 |
| K2 | Evaluate the implications of contracts for organisations | 9 | S2 | Contribute to the definition of contractual agreements | 9 |
| K3 | Explain the procurement process for projects | 9 | S3 | Contribute to the management of a contract | 9 |
| K4 | Analyse legal procedures and ethical considerations for managing contracts | 9 | | | |
| **Delivery content and guidance** | | | | | |
| **Ref** | **Knowledge** | **Maps to standard** | **Ref** | **Skill** | **Maps to standard** |
| K1 | Contract requirements: agreeing the schedule, what functions are required, agreeing costs, consequences for underperformance etc | 9 | S1 | Contribution: identifying the specific needs (emails, project documentation), project specifications, standards specifications, vendor lists, tender documents, purchase orders, pricing structure, delivery documentation, terms and conditions | 9 |
| K2 | Implications of contracts:  expected outcomes, complaint procedures, legally binding requirements, adherence to contracts, penates for failing to adhere to contracts, legal consequences for non-performance | 9 | S2 | Evidence examples could include agenda and/or minutes of meetings, e-mails, project documentation, previous contracts, legal advice | 9 |
| K3 | The procurement process: initiating and planning, selecting, contract writing, monitoring, and closing and completing | 9 | S3 | Management of contract includes: emails, project plans, communication plans, risk logs, operational plans, invoices, technical specifications, intellectual property, outsourcing, use of contract management software, reports, budgetary documentation | 9 |
| K4 | Legal procedures for managing contracts: the requirements for negotiating and executing a contract, managing performance, modification and termination of a contract<br><br>Ethical considerations include: cultural, environmental, equality etc | 9 | | | |

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## Module 10    Quality Management

| Assessment criteria | | | | | |
|---|---|---|---|---|---|
| **Ref** | **Knowledge**<br>Apprentices will need to: | **Maps to standard** | **Ref** | **Skill**<br>Apprentices will need to: | **Maps to standard** |
| K1 | Examine quality management processes used for projects | 10 | S1 | Contribute towards the development of a quality management plan | 10 |
| K2 | Outline quality assurance processes used for projects | 10 | S2 | Manage project assurance | 10 |
| K3 | Explain quality improvements for projects | 10 | S3 | Contribute towards project peer reviews | 10 |
| K4 | Evaluate the outcomes of a quality management plan | 10 | S4 | Utilise own organisation's continual improvement process | 10 |
| **Delivery content and guidance** | | | | | |
| **Ref** | **Knowledge** | **Maps to standard** | **Ref** | **Skill** | **Maps to standard** |
| K1, K2 | Quality: the discipline applied to ensure that both the outputs (or products) of the project and the process by which the outputs (or products) are delivered meet the required needs of stakeholders. Quality management processes include: customer satisfaction, costs of non performance/compliance, continuous improvement and evaluation, buy in from stakeholders and senior management, audit trail and sign off. | 10 | S1 | Development of a quality management plan: strategic and operational plans, project plans, quality standards, team meetings, stakeholder plans, emails, KPIs, witness statements, quality tools, reporting documents, risk log. Also, a quality management and assurance log to 'sign off' acceptance or failure. Noting the link to lessons learnt. | 10 |
| K3 | Quality improvements: quality objectives, key project deliverables, key processes, quality standards, quality control, assurance | 10 | S2 | Project assurance evidence examples include: agendas, minutes, emails, communications plan, project and team meetings, witness statements, presentations, appraisals, reports | 10 |
| K4 | Analysis must include metrics for processes and quality standards, Root Cause Analysis, Sigma Six, Kaizen, the 5 Why's, PDSA (plan, do, study, act), internal process improvement tools and lessons learnt | 10 | S3 | Peer review: 360-degree feedback, team meetings, feedback forms, internal feedback software, lessons learnt, acceptance criteria, customer quality experience quality responsibilities requirements for specialist work, change control processes, any other tools to secure the quality standards | 10 |
| | | | S4 | Continual improvement: Root Cause Analysis, Sigma Six, Kaizen, the 5 Why's, PDSA (plan, do, study, act), internal process improvement tools and lessons learnt | 10 |

## Module 11    Resource Management

| Assessment criteria | | | | | |
|---|---|---|---|---|---|
| Ref | Knowledge<br>Apprentices will need to: | Maps to standard | Ref | Skill<br>Apprentices will need to: | Maps to standard |
| K1 | Outline the use of resource analysis in a project management setting | 11 | S1 | Develop resource management plans for project activities | 11 |
| K2 | Justify the use of resource allocation in a project management setting | 11 | S2 | Acquire and manage resources to deliver a project | 11 |
| K3 | Evaluate the use of resource commitment in a project management setting | 11 | S3 | Monitor progress in line with resource management plans | 11 |

## Delivery content and guidance

| Ref | Knowledge | Maps to standard | Ref | Skill | Maps to standard |
|-----|-----------|------------------|-----|-------|------------------|
| K1 | Resources: Human resources, capital, assets, infrastructure, machinery, materials, technology, property | 11 | S1 | Resource management plans: planning documents (identifying resources), project plan, procurement plan, service level agreements, contracts, mobilisation documentation, policies and procedures, meetings, minutes, agendas, e-mails, presentations, operational plans, team meetings, stakeholder plans, budget documentation, witness statements, spreadsheets

Evidence in the form of written and tracked documentation should be available throughout the project lifecycle demonstrating the changing nature of the subject area. Apprentices should be able to provide and explain this. | 11 |
| K2 | Resource allocation: the process by which resources are mapped against activities which are often shown as aggregated resource histograms against a timescale Resource allocation smoothing levelling and scheduling: techniques used to determine and manage appropriate levels of resource through analysis of the task. Allocation and commitment of required resources must be in line with the project plan | 11 | S2 | Resources include: team meetings, project documents, e-mails, operational plans, SMART objectives resource plans, orders, purchase orders, capacity requests, Resource management includes commitment and acceptance | 11 |
| K3 | Resource commitment: the allocation and confirmation that the resource has been assigned to that activity Apprentices should also be aware that resource acceptance is the agreement of the customer accepting the resource is sufficient to achieve the task | 11 | S3 | Progress monitoring through: spreadsheets, monitoring software, project plans, KPI's, minutes of meetings, e-mails | 11 |

## Module 12    Context

<table>
<tr><td colspan="6"><strong>Assessment criteria</strong></td></tr>
<tr><td>Ref</td><td>Knowledge<br>Apprentices will need to:</td><td>Maps to standard</td><td>Ref</td><td>Skill<br>Apprentices will need to:</td><td>Maps to standard</td></tr>
<tr><td>K1</td><td>Contrast the different contexts in which projects can be delivered</td><td>12</td><td>S1</td><td>Apply project management skills, in line with own organisation's standards</td><td>12</td></tr>
<tr><td>K2</td><td>Analyse the interdependencies between projects, programmes and portfolio management</td><td>12</td><td></td><td></td><td></td></tr>
<tr><td>K3</td><td>Describe phases and key review points within project life cycles</td><td>12</td><td></td><td></td><td></td></tr>
<tr><td colspan="6"><strong>Delivery content and guidance</strong></td></tr>
<tr><td>Ref</td><td>Knowledge</td><td>Maps to standard</td><td>Ref</td><td>Skill</td><td>Maps to standard</td></tr>
<tr><td>K1</td><td>Contexts: health, safety and environmental management, and sectors such as manufacturing, management, construction</td><td>12</td><td>S1</td><td>Project management skills: leadership, communication, scheduling, risk management, cost management, negotiating, critical thinking, task management, quality management</td><td>12</td></tr>
<tr><td>K2</td><td>Interdependencies include: cost, time, scope, research and development, budgets, schedules, resources<br>Project is the individual task, programme is a group of projects and portfolio is a group of programmes</td><td>12</td><td></td><td></td><td></td></tr>
<tr><td>K3</td><td>Project life cycle: initiation, planning, execution, monitoring and control, closure, when to review, how to review etc</td><td>12</td><td></td><td></td><td></td></tr>
</table>

## Module 13    Leadership

| Assessment criteria | | |
|---|---|---|
| **Ref** | **Knowledge**<br>Apprentices will need to: | **Maps to standard** |
| K1 | Analyse how the project vision, values and objectives link to strategic objectives | Behaviour |
| K2 | Recommend how the vision, values and objectives can be communicated and reinforced to team members and stakeholders | Behaviour |
| K3 | Compare a range of leadership styles used in project management | Behaviour |
| K4 | Examine leadership qualities used in project management | |
| K5 | Outline the importance of motivation on team performance within project management | Behaviour |
| K6 | Evaluate the characteristics of the working environment which encourages and sustains high performance | Behaviour |

## Delivery content and guidance

| Ref | Knowledge | Maps to standard |
|-----|-----------|------------------|
| K1 | Links can include: Enables planning, resourcing, focus, delivery, monitoring. What project vision, values and objectives might be (for example in a business case, project plan etc) and what strategic objectives are | Behaviour |
| K2 | Communication and reinforcement could be in: Meetings, e-mails, one on one, training, visuals, presentations, online posting, consistent messaging, newsletters, follow up | Behaviour |
| K3 | Leadership styles include: autocratic, bureaucratic, charismatic, democratic, laissez-faire, people oriented, servant leadership, task orientated leadership | Behaviour |
| K4 | Leadership styles include: autocratic, bureaucratic, charismatic, democratic, laissez-faire, people oriented, servant leadership, task orientated leadership | Behaviour |
| K5 | The link between motivation and performance could include: improved performance levels, reduction in staff turnover, reduction of absenteeism, reduction in resistance to change | Behaviour |
| K6 | The link between motivation and performance could include: improved performance levels, reduction in staff turnover, reduction of absenteeism, reduction in resistance to change | Behaviour |

## Behaviours

| | Ref | Behaviours<br>Apprentices will need to: |
|---|---|---|
| Collaboration and team work | B1 | Understands and is effective as part of an integrated team. |
| Leadership | B2 | Communicates direction, and supports the vision for project delivery. |
| Effective and appropriate communication | B3 | Working effectively with and influencing others, taking account of diversity and equality. |
| Effective and appropriate communication | B4 | Influences and facilitates effective team performance. |
| Drive for results | B5 | Demonstrates clear commitment to achieving results, and improving performance. |
| Integrity, ethics, compliance and professionalism | B6 | Promotes the wider public good in all actions, acting in a morally, legally and socially appropriate manner. |
| Integrity, ethics, compliance and professionalism | B7 | Promotes and models the highest standards of professional integrity, ethics, trust and continued development. |

# End-point Assessment Coverage

Each End-point Assessment will cover specific elements of the modules within the standard. These modules are selected by the apprentice and will therefore be confirmed at the Planning meeting conducted by the End-point Assessor. This coverage for each module is as follows. The coverage is taken from the amplification above.

| Module | Coverage |
|---|---|
| Governance | K1- K6, S1-S2 |
| Stakeholder and communications management | K1-K6, S1-S4 |
| Budgeting and cost control | K1- K4, S1- S4 |
| Business case and benefits | K1-K2, S1 |
| Scope management | K1-K5, S1-S2 |
| Consolidated planning | K1-K3, S1-S3 |
| Schedule management | K1- K4, S1-S2 |
| Risk and issue management | K1- K4, S1-S4 |
| Contract management and procurement | K1- K4, S1- S3 |
| Quality management | K1- K4, S1- S4 |
| Resource management | K1-K3, S1-S3 |
| Context | K1, S1-S3 |
| Collaboration and team work | B1 |
| Leadership | B2<br>K1-K6 |
| Communication | B3-B4 |
| Drive for results | B5 |
| Integrity, ethics, compliance and professionalism | B6- B7 |

## Re-Assessment
If the apprentice fails an assessment, this will need to be completed again. Apprentices may complete the other assessments while they prepare to complete the failed assessment. For a list of the re-sit costs, please see the Innovate website. It is the responsibility of the employer and the employer/training provider to ensure that apprentices are ready to pass the End-point Assessments and it is expected that apprentices will pass the assessments first time.

## Assessment Overview
The assessments can be completed in any order the apprentice prefers and can also be completed on the same day.

The End-point Assessor will review the evidence for each apprentice and grade the apprentice on the following scale: Fail/ Pass/Merit/Distinction. The End-point Assessor will make the final decision as to whether or not the standard has been met.

All apprentices must take all elements of the End-point Assessment and achieve a minimum of 60% for each component.

| Assessment method | Assessed By | Weighting | Marks and Grading |
|---|---|---|---|
| Presentation supported by portfolio of evidence | End-point Assessor | 33.3% | Marked out of 25; 5 marks for each of the 5 modules. Combined with the total marks to allocate grading |
| Professional Discussion supported by portfolio of evidence | End-point Assessor | 66.6% | Marked out of 50; 5 marks for each of the 10 modules. Combined with the total marks to allocate grading |

## Grading

The marks will be combined to provide an overall grade. The grade is allocated on the following marks being achieved:

| Grade | Total Mark | Total % |
|---|---|---|
| Distinction | 66 to 75 | 88+ |
| Merit | 56 to 65 | 75 – 87 |
| Pass | 45 to 55 | 60 – 74 |
| Fail | 44 or below | <60 |

Marks will be allocated based on the following scoring information for both the presentation and the professional discussion.

| 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 |

## Internal Quality Assurance

Internal quality assurance is conducted by Innovate Awarding. All assessments completed by an apprentice are subject to Innovate Awarding's Internal Quality Assurance Policies.

## External Quality Assurance

The external quality assurance organisation for the Associate Project Manager standard is Institute for Apprenticeships. The external quality assurance organisation may require access to an apprentice's assessments and they may need to speak to the apprentice directly. Innovate Awarding has a responsibility to accommodate any reasonable request made by the external quality assurance organisation.
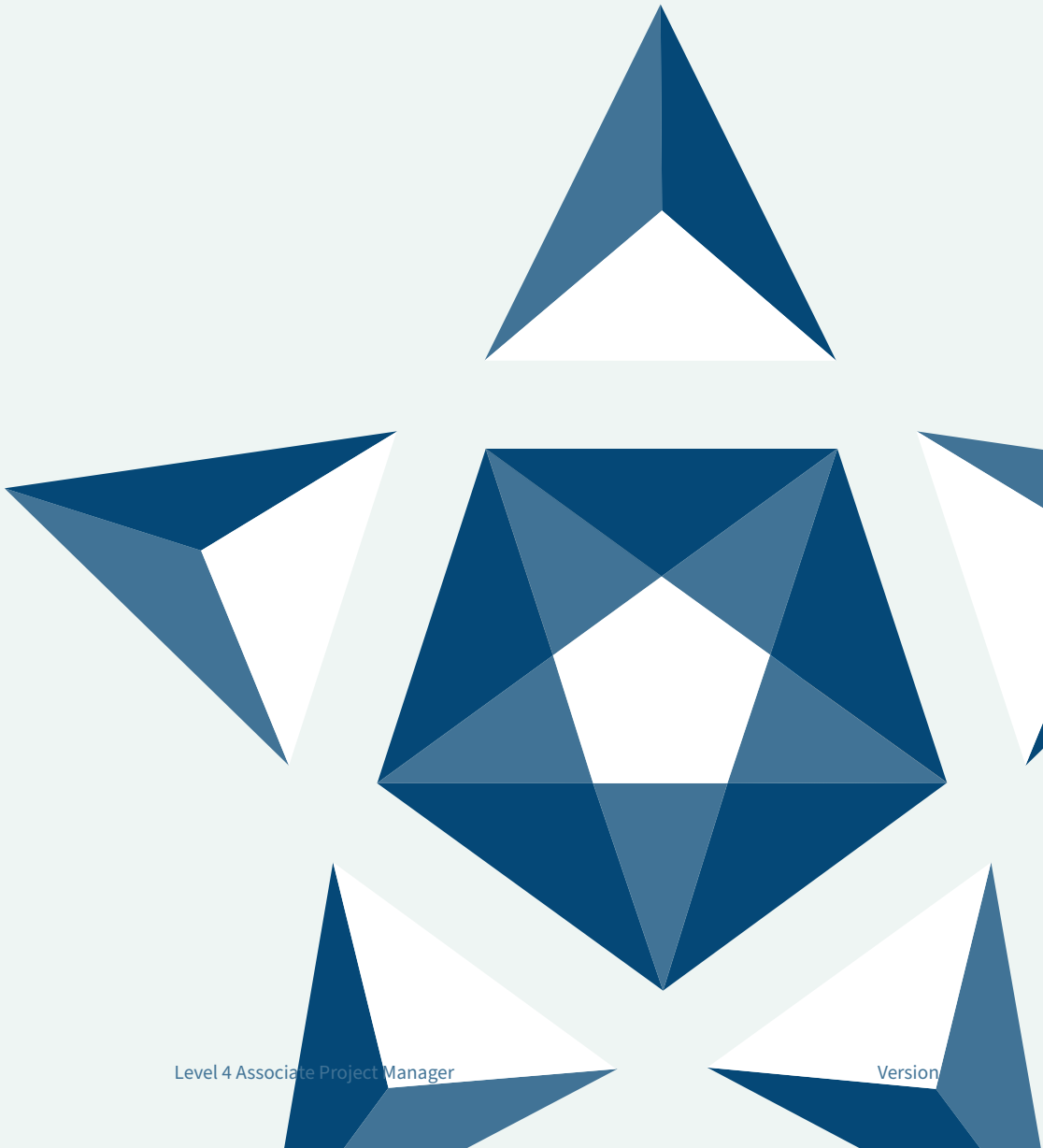
# Further Information

*www.innovateawarding.org/apprenticeshipstandards*

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