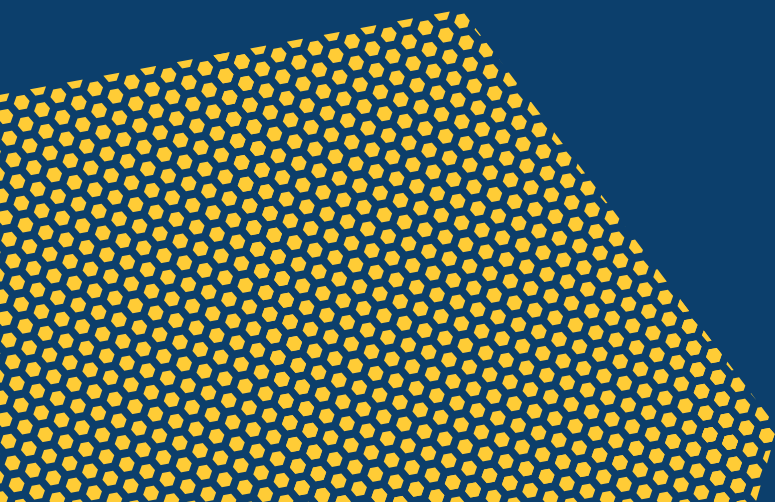




TQUK Level 4 End-Point Assessment for  
ST0310 **Associate Project Manager V1.4**

Qualification Number: 610/0996/9

# Standard Specification



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# Key Information

Reference:	ST0310
Version:	V1.4
Level:	4
Typical duration to gateway:	18 months
Typical EPA period:	5 months
Maximum funding:	£7,000
Route:	Business and administration
Approved for delivery:	19 August 2016
Lars code:	128
EQA provider:	Ofqual
Review:	This apprenticeship standard will be reviewed in accordance with IfATE's change request policy.
Qualification Number	610/0996/9

# Apprenticeship Summary

## Overview of the Role

Managing project work and teams for businesses and other organisations.

## Occupation Summary

This occupation is found in small, medium, and large organisations within the public, private and third sectors. Associate project managers work in all sectors such as government, retail, food and drink, infrastructure, education, charities, research, and banking. The working environment can vary from being in an office, on site, at client and contractor's locations, and working remotely.

The broad purpose of the occupation is to contribute to the successful delivery of a project, ensuring its scope and benefits are achieved as planned. They do this primarily by identifying, resourcing, scheduling, and monitoring the activities that need to happen in a certain sequence and timescale. They monitor the project objectives and milestones and adjust plans in accordance with evolving circumstances.

Associate project managers are key to enabling organisations meet their business goals by successful project delivery. Projects are diverse in nature and could involve anything from banking through to construction. Projects can be large or small and deliver a required product that either creates something new or improves efficiency and effectiveness, such as designing and constructing a new motorway or implementing a new IT system. Many organisations deliver their own projects, using in-house associate project managers to work on scope they might be already familiar with. Some associate project managers work on a contract basis or for specialist organisations that deliver outsourced project work on behalf of clients.

In their daily work, an employee in this occupation interacts with a range of internal stakeholders including members of their own team and other departments such as IT, legal, finance, strategy, HR, operations, commercial, marketing, sustainability, senior management, and governing decision-making bodies. They also interact with a range of external stakeholders such as members of the public, investors, customers, regulators, suppliers, auditors, and partners. They will typically report to the Project Manager who ensures the delivery of the project scope.

An employee in this occupation will be responsible for identifying, defining, and delivering some or all the aspects of a projects lifecycle within the limits set by the project manager. Associate project managers work on their own and in a range of team settings.

They may contribute to the drafting of business cases that justify why a project is required. They will collaborate with stakeholders to negotiate and allocate project activities to members of the integrated project team.

The associate project manager will be monitoring progress using relevant project tools and techniques and is also responsible for quality assuring work to completion. They will report on progress and adapt plans as needed.

They will apply codes of practice, legislation, and regulation in respect of the organisation's areas of operation. This will apply not only to legal and ethical responsibilities but will include the central placement of inclusion and sustainability. Associate project managers manage conflicting project and current political objectives such as net carbon zero and risk management to influence successful outcomes.

They work within agreed budgets and available resources, and work without high levels of supervision, usually reporting to the project manager. They may occasionally be responsible for decision making, but more often will guide or influence the decisions of others.

They must also escalate project issues beyond the scope of their role or when they identify significant project risks and issues.

They analyse and incorporate lessons learned into future project management and to keep their project skills up to date.

They contribute to overall project aims in line with customer requirements.

They will understand how their role supports the wider organisation and project structure.

## Professional Recognition

This apprenticeship aligns with Association for Project Management for Associate Membership.

# Assessment Methods

The end-point assessment (EPA) for this standard consists of two assessment methods/components:



Written project report with presentation and questioning



Professional discussion underpinned by a portfolio of evidence

## Assessment Order

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 Window

The EPA period starts when Training Qualifications UK (TQUK) confirms the gateway requirements have been met and is typically five months.

## Gateway Considerations

Before the apprentice can start their EPA, the training provider is required to upload the following:

- Photo ID
- Portfolio of evidence
- Project Report Title and Scope

At gateway, the training provider is also requested sign a declaration to confirm that the English and maths requirements have been met in line with the funding rules.

# Written project report with presentation and questioning

## Assessment Overview

The written project report involves the apprentice completing a significant and defined piece of work that has a real business application and benefit. The written project report must meet the needs of the employer's business and be relevant to the apprentice's occupation and apprenticeship. The agreed project will present a typical business task, appropriate for demonstrating the skills and knowledge on the standard.

This assessment method has **two components**:

1. written project report
2. presentation with questions and answers.

Together, these components give the apprentice the opportunity to demonstrate the knowledge, skills, and behaviours (KSBs) mapped to this assessment method.

## Delivery

The following are examples of the types of written project report the apprentice could submit.

- Work as part of an integrated project team to produce the design, manufacture, installation, commissioning and handover of a piece of equipment to be replaced on a nuclear site. Engaging with stakeholders on a regular basis to ensure their requirements are safely met to time and cost, whilst abiding to the appropriate laws and legislations.
- Deliver a major infrastructure project by defining customer requirements, determining if they are feasible and develop a business case to enable the project to commence. Work with subject matter experts to conduct surveys and undertake risk analysis. Produce a health and safety file throughout the stages of project delivery to be handed to the asset owner upon project completion.
- Manage the supply chain to develop a new piece of software, producing, and completing the testing schedule for the software prior to implementing it into the organisation. Evaluate the learning from this project and apply it into the recommendations to ensure continuous improvements are made.
- Plan and deliver a project to improve outcomes in a challenged organisation area based on initial evaluation of performance. Engage with stakeholders to develop buy in and create working relationships to enable you to be embedded within the site. Identify appropriate improvement interventions and create schedule for delivery. Keep updated records to enable reporting within governance structure at appropriate level of detail and provide updates to central teams where required.

To ensure the written project report is suitable, TQUK will sign-off the written project report's title and scope at gateway. A brief project scoping document must be submitted to TQUK of no more than **500 words**, showing that the project will provide the opportunity for the apprentice to cover the KSBs mapped to this assessment method, and meet them at the highest available grade. This document is not assessed.

Although the research and project will be undertaken and completed on-programme, so before the gateway, **the apprentice must start the written project report after the gateway**. The project itself is not part of the EPA. The employer should ensure the apprentice has the time and resources, within the written project report period, to plan and complete their written project report.

The project will typically be undertaken on the employer's premises. The apprentice may work as part of a team to assist in the completion of a project or elements of a project, which could include internal colleagues or technical experts. The project may be of any size such as a large or small project. The apprentice must however complete their written project report and presentation unaided and it must be reflective of their own role and contribution. The apprentice and their employer must confirm this when the written project report and any presentation materials are submitted.

### Component 1: Written project report

The written project report must include at least:

- an executive summary (or abstract)
- an introduction
- the scope of the project (including key performance indicators, aims and objectives)
- an outline project delivery schedule
- an estimate of cost
- learning from change outcomes
- project outcomes, did it deliver the benefits included? was it completed to time and cost?
- identification of findings
- recommendations and conclusions
- references
- an appendix containing mapping of KSBs to the report.

The written project report must have a word count of **3,500 words** (with an allowed tolerance of 10% above or below at the apprentice's discretion). Appendices, references and diagrams are not included in this total. The apprentice must produce and include a mapping in an appendix, showing how the written project report evidences the KSBs mapped to this assessment method.

The apprentice must complete and submit the written project report and any presentation materials to TQUK by the end of **week 12 of the EPA period**.

## Component 2: Presentation with questions

The apprentice must prepare and deliver a presentation to the End-Point Assessor. After the presentation, the assessor must ask the apprentice questions about their written project report and presentation. The presentation should cover:

- an overview of the project
- the project scope
- how this scope was delivered (including schedule, milestones and key resources)
- summary of delivery tasks undertaken by the apprentice
- project outcomes

The presentation with questions must last **60 minutes**. This will typically include a **presentation of 20 minutes and questioning lasting 40 minutes**. The assessor must use the full time available for questioning, and can increase the time of the presentation and questioning by up to 10% to allow the apprentice to complete their last point or respond to a question if necessary.

The End-Point Assessor must ask at least **six questions**. Follow up questions are allowed where clarification is required. The purpose of these questions is:

- to verify that the activity was completed by the apprentice
- to seek clarification where required
- to assess those KSBs that the apprentice did not have the opportunity to demonstrate with the report, although these should be kept to a minimum
- to assess level of competence against the grading descriptors

The apprentice must submit any presentation materials to TQUK at the same time as the report, i.e. by the end of week 12 of the EPA period. The apprentice must notify TQUK at that point of any technical requirements for the presentation.

During the presentation, the apprentice must have access to:

- audio-visual presentation equipment
- flip chart and writing and drawing materials
- computer

The End-Point Assessor must have at least **two weeks** to review the written project report and any presentation materials to allow them to prepare questions. The apprentice must be given at least **two weeks'** notice of the presentation with questions.

The presentation with questions must take place in a suitable venue, for example the employer's premises, in a [controlled environment](#), free from any distractions. The presentation with questions can be conducted by video conferencing using Microsoft Teams.

## Grading

The End-Point Assessor will make all grading decisions.

This assessment is graded fail, pass, or distinction, according to the [grading criteria](#).

To achieve a pass in this assessment, the apprentice must meet all the pass criteria. To be awarded a distinction, they must meet all the pass criteria and all the distinction criteria. If the apprentice does not meet all the pass criteria, this assessment will be graded as a fail.

**Written project report with presentation and questioning - KSBs and Grading Criteria**

Project management tools and techniques	
Pass	Explains how they use project monitoring and techniques to understand the project context and to track, interpret and report on performance. (K4, S1)
	Describes how they use configuration management and change control to schedule and maintain projects and manage resources through the project lifecycle. (K19, K21, K22, S25, S26)
	Describes the need and benefit of the governance structure and ethical and sustainable procurement processes and how they impact on their role. (K5, K24)
Dist.	Justifies the techniques they use to track, interpret, and report on project performance and how they have supported successful delivery of the project within its context. (K4, S1)
K4 Techniques used to understand the project context, such as PESTLE (political, economic, social, technological, legal, and environmental), SWOT (strength, weakness, opportunities, threats) or VUCA (velocity, uncertainty, complexity, ambiguity).	
K5 The need and benefit of the project governance structure, requirements, and process and the impact on their role.	
K19 Configuration management and change control.	
K21 Project scheduling and maintenance, including critical path analysis.	
K22 Allocation and management of resources throughout the project life cycle.	
K24 Procurement strategies and processes that are both ethical and sustainable.	
S1 Use project monitoring and reporting techniques to track, interpret and report on performance.	
S25 Use configuration management and change control to schedule and maintain projects.	
S26 Manages resources through the project lifecycle.	

Managing information	
Pass	Summarises how they schedule, prepare and monitor activities that contribute to the overall objectives, and the importance of aligning project and organisational objectives. (K2, S12)
	Describes the approaches taken to maintain a business case and how they manage the benefits which will be achieved through successful delivery of the project. (K10)
	Describes technology, software, and methods they use to define, record, integrate, deliver, and manage the scope of the project and how they use them to identify and monitor risks and issues planning and implementing responses to them. (K12, K30, S14)
	Explains how and when to apply estimating methods to work within the approved project budget taking ownership and accountability for this task. (K18, S21, B3)
	Explains how they used continual improvement and lessons learned from projects to support the preparation or maintenance of a Resource Management Plan to drive project activities. (S16, S17)
Dist.	Evaluates the approaches they take to maintain a business case, what benefits they achieve and how they ensure successful delivery of a project. (K10)
	Explains the importance of continual improvement and the use of lessons learnt from projects and recommend how they would use these to drive future project activities. (S16, S17)
K2 The importance of alignment between the project and organisational objectives.	
K10 Approaches to the maintenance of a business case and the management of the benefits which will be achieved upon the successful delivery of the project.	
K12 Methods used to define, record, integrate, deliver, and manage scope.	
K18 How and when to apply different estimating methods.	
K30 Technology and software used in the performance of project management activities.	
S12 Prepare, monitor, and schedule activities that contribute to the delivery of the overall project schedule and objectives.	
S14 Identify and monitor project risks and issues; and plan and implement responses to them.	
S16 Use an organisation's continual improvement process including lessons learned to improve performance.	
S17 Support the preparation or maintenance of a resource management plan for project activities.	
S21 Work within the approved project budget.	
B3 Has accountability and ownership of their tasks and workload.	

Managing stakeholders	
<b>Pass</b>	Describes the communication techniques they use to support the project vision and ensure buy in to objectives, through collaborating and maintaining stakeholder relationships' (K14, S6, B2)
<b>Dist.</b>	N/A
K14 Communication techniques and approaches to interact with stakeholders to meet their requirements.	
S6 Communicate and support the project vision, to ensure buy in to the project objectives.	
B2 Works collaboratively and builds strong relationships with others across the organisation and external stakeholders.	
Research, analysis and evaluation	
<b>Pass</b>	Describes the principles they use to evaluate project success and an integrated Project Management Plan ensuring that lessons learned are captured and how they may impact on future projects, including how these are used to recommend areas for improvement. (K26, S11)
	Explains how they would evaluate the impact of project objectives and respond to challenges around sustainability and the UK Government's policy to achieve net carbon zero. (K28)
	Demonstrates how they collate and analyse information to support negotiations on project objectives and provide feedback on a project business case to ensure the project remains valid. (S7, S9)
<b>Dist.</b>	Critically evaluates the principles they use to evaluate project success and the impact of the objectives on sustainability and how these support recommendations for improvement areas on future projects. (K26, K28, S11)
K26 Principles for evaluating project success, including how lessons learned are captured and can impact future project delivery.	
K28 The impact of project objectives and how to respond to challenges around sustainability and the UK Government's policy to achieve net carbon zero.	
S7 Collate and analyse information and provide input to support negotiations relating to project objectives.	
S9 Review and provide feedback on a project business case to ensure the project remains valid.	
S11 Evaluate an integrated project management plan to provide recommendations on areas for improvement.	

# Portfolio of Evidence

Apprentices must compile a portfolio containing evidence during the on-programme period of the apprenticeship. It should only contain evidence related to the knowledge, skills and behaviours (KSBs) that will be assessed by the professional discussion. The portfolio will typically contain **20 discrete pieces of evidence**.

Evidence should be mapped against the KSBs assessed by the professional discussion and may be used to demonstrate more than one KSB. The apprentice must provide evidence for all the KSBs. Incomplete portfolios will be rejected at the gateway stage.

The [Portfolio Mapping and Tracking Form](#) allows the apprentice to identify which piece of evidence meets each KSB.

Evidence sources may include workplace documentation and records, for example:

- workplace policies and procedures
- reports
- presentations
- witness statements
- annotated photographs
- video clips with a maximum total duration 10 minutes; the apprentice must be in view and identifiable

Any employer contributions to the portfolio of evidence should focus on direct observation of performance (a witness statement, for example) rather than opinions.

This is not a definitive list; other evidence sources are possible. However, the evidence provided must be valid and attributable to the apprentice.

**The portfolio of evidence should not include reflective accounts or any methods of self-assessment.**

As the portfolio is to underpin the professional discussion, it is not directly assessed or marked. It will only be reviewed to prepare questions for the professional discussion, and the End-Point Assessor will not be required to give feedback on the portfolio after this review.

# Professional discussion underpinned by a portfolio of evidence

## Overview

The professional discussion involves the End-Point Assessor and the apprentice having a formal two-way conversation. It must be structured to give the apprentice the opportunity to demonstrate the knowledge, skills, and behaviours (KSBs) mapped to this assessment method to the highest available grade.

The End-Point Assessor will conduct and assess the professional discussion, which must last for **60 minutes**. The End-Point Assessor can increase the time by up to 10% to allow the apprentice to respond to a question if necessary.

The apprentice must have **two weeks'** notice of the professional discussion, and the End-Point Assessor must have at least **two weeks** to review the supporting documentation.

The apprentice must have access to their portfolio of evidence during the professional discussion to refer to and illustrate their answers with evidence from the portfolio.

The End-Point Assessor must ask at least **six questions**. Follow-up questions are allowed where clarification is required.

The professional discussion must take place in a suitable venue, for example the employer's premises, in a [controlled environment](#), free from any distractions. The professional discussion can be conducted by video conferencing using Microsoft Teams.

## Grading

The End-Point Assessor will make all grading decisions.

This assessment is graded fail, pass, or distinction according to the [grading criteria](#).

To achieve a pass in this assessment, the apprentice must meet all the pass criteria. To be awarded a distinction, they must meet all the pass criteria and all the distinction criteria.

If the apprentice does not meet all the pass criteria, this assessment will be graded as a fail.

**Professional discussion underpinned by a portfolio of evidence - KSBs and Grading Criteria**

Business requirements and objectives	
Pass	Describes the differences between projects and business as usual including how they seek learning and professional development opportunities in both settings. (K1, B5)
	Explains the importance of the content and purpose of a business case and how underpinning data is used to support the written submission through the governance process. (K9, S20)
Dist.	N/A
K1 The differences between projects and business as usual.	
K9 Importance, content, and purpose of a business case.	
S20 Provide underpinning data to support the written submission through the governance process.	
B5 Seeks learning opportunities and continuous professional development.	
Regulation and legislation	
Pass	Explains the regulatory and legislative requirements which impact on their role and how they apply them to the projects they are delivering. (K27, S23)
Dist.	N/A
K27 Relevant regulations and legislation such as data protection, and how they impact on their role.	
S23 Apply relevant legislation, regulations, codes of practice, and ethical guidance where appropriate to their work.	

Project management tools and techniques	
Pass	Describes the interdependencies between project, programme, and portfolio management and how these influence the purpose, format, and significance of the project management plan. (K3, K11)
	Explains the differences and comparative benefits between functional, matrix and project structures, how they interact with the principles of project risk and issue management and how data is used to inform actions to take to mitigate risks on the project. (K6, K23, S24)
	Outlines the different roles and responsibilities in a project and what techniques they use to manage conflict and negotiation within their area of responsibility. (K7, K16, S4)
	Describes the differences and comparative benefits between linear, iterative and hybrid life cycle approaches. (K8)
	Discusses the role and purpose of quality requirements, planning and control in a project environment and the principles of conducting project management activities which are ethical and inclusive. (K25, K29)
Dist.	Analyses project risk and issue management principles and the impact they may have on the successful delivery of a project. (K23)
	Justifies how project management activities ensure that all activities undertaken are ethical and inclusive. (K29)
K3 The interdependencies between project, programme, and portfolio management.	
K6 The differences and comparative benefits between functional, matrix and project structures.	
K7 Different roles and responsibilities within a project environment.	
K8 The differences and comparative benefits between linear, iterative and hybrid life cycle approaches.	
K11 The purpose, format, and significance of the project management plan.	
K16 Techniques for managing conflict and negotiation.	
K23 Principles of project risk and issue management.	
K25 The role and purpose of quality requirements, planning and control in a project environment.	
K29 Principles of conducting project management activities which are ethical and inclusive.	
S4 Resolve conflict as and when required with stakeholders within limits of responsibility.	
S24 Use data to inform decisions on actions to take to mitigate risks on project.	

Managing information	
Pass	Discuss information management and how it is used to ensure that integrated schedules support critical path analysis, interface management, resource forecasting and risk management. (K15, S22)
	Describe the presentation techniques they use and explain how they apply change control processes to support the management of project scope and deliver quality plans using digital tools and software to meet the project objectives. (K31, S10, S15, S19)
Dist.	Justifies why they have applied change control processes and how these supported the management of project scope. (S10)
K15 The use of information management.	
K31 Presentation tools and techniques.	
S10 Apply change control processes to support the management of project scope.	
S15 Deliver a Quality Management Plan which contributes to quality control processes.	
S19 Use digital tools and software to meet project objectives for example research, collaboration, presentations, and resolution of problems.	
S22 Ensure that integrated schedules support critical path analysis, interface management, resource forecasting and risk management.	

Managing stakeholders	
Pass	Describes how they identify, analyse, and manage stakeholders and adapt their communications to work flexibly to changing circumstances. (K13, S5, B1)
	Outlines the techniques used for working collaboratively, managing, and engaging with stakeholders and how they use these to influence and negotiate to create a positive outcome for the project. (K17, S2, S3)
	Demonstrates how they operate professionally in order to work with stakeholders to deliver the project. (S18, B4)
Dist.	Evaluates the communications they use with stakeholders to influence, negotiate, and resolve conflict to create a positive outcome for the project and how they would adapt their style to suit the audience. (S5, S18, B1)
K13 The identification, analysis, and management of stakeholders.	
K17 Techniques for working collaboratively within a team and with stakeholders.	
S2 Manage and engage with stakeholders.	
S3 Influence and negotiate with others to create a positive outcome for the project.	
S5 Adapt communications to different stakeholders.	
S18 Work with stakeholders to deliver the project.	
B1 Works flexibly and adapts to circumstances.	
B4 Operates professionally with integrity and confidentiality.	
Research, analysis and evaluation	
Pass	Describes the principles of earned value management (EVM) and the interpretation of EVM information, and how this is used to monitor and analyse budgets. (K20, S8)
	Explains how they evaluate the Risk Management Plan to address threats to delivery and solutions they have recommended. (S13)
Dist.	Evaluates the principles of earned value management (EVM) they have used, and the recommendations they have made on how this is used to monitor and analyse budgets. (K20, S8)
K20 The principles of earned value management (EVM) and the interpretation of EVM information.	
S8 Monitor and analyse project budgets.	
S13 Evaluate and make recommendations on the risk management plan to threats to delivery and recommend solutions.	

# Overall Grading

The overall grades available for this apprenticeship are fail, pass, or distinction. Each assessment component is graded individually. Once an apprentice has completed all assessment components, the grades are combined as described in the table below to determine an apprentice's overall grade.

Written project report with presentation and questioning	Professional Discussion underpinned by a portfolio of evidence	Overall Grade
A fail in any assessment component will result in a fail overall		
Pass	Pass	Pass
Distinction	Pass	Pass
Pass	Distinction	Pass
Distinction	Distinction	Distinction

# Resits and Retakes

If an apprentice fails one or more assessment method(s), they are eligible for a resit or a retake at their employer's discretion.

A resit does not need further learning, whereas a retake does. An apprentice should have a supportive action plan to prepare for a resit or a retake.

Resits are typically taken within two months of the fail notification. The timescale for a retake is dependent on how much retraining is required, but they are typically taken within three months of the fail notification.

Failed assessment methods must be resat or retaken within a six-month period from the fail notification, otherwise the entire EPA will need to be resat or retaken in full.

If the apprentice fails the project assessment method, they will be given four weeks to rework the report in line with the feedback given and submit the amended report.

If an apprentice requires a resit or retake, their EPA grade will be capped at a pass, unless Training Qualifications UK determines there are exceptional circumstances.

Resits and retakes are not offered to an apprentice wishing to move from pass to a higher grade.

# Appeals

Training Qualifications UK's Appeals Policy, including time frames, can be found [here](#).