

End-point assessment plan for Information Manager apprenticeship standard

Apprenticeship standard reference number	Level of this end point assessment (EPA)	Integrated
ST0762	4	No

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Introduction and overview

This document sets out the requirements for end-point assessment (EPA) for the Information Manager apprenticeship standard. It is for end-point assessment organisations (EPAOs) who need to know how EPA for this apprenticeship must operate. It will also be of interest to Information Manager apprentices, their employers and training providers.

Full time apprentices will typically spend 24 months on-programme (before the gateway) working towards the occupational standard, with a minimum of 20% off-the-job training. All apprentices will spend a minimum of 12 months on-programme.

The EPA period should only start, and the EPA be arranged, once the employer is satisfied that the apprentice is deemed to be consistently working at or above the level set out in the occupational standard, all of the pre-requisite gateway requirements for EPA have been met and that they can be evidenced to an EPAO.

All pre-requisites for EPA assessment methods must also be complete and available for the independent assessor as necessary.

For level 3 apprenticeships and above apprentices without English and mathematics at level 2 must achieve level 2 prior to taking their EPA.

The EPA must be completed within an EPA period typically lasting 5 months, beginning when the apprentice has passed the EPA gateway.

The EPA consists of 2 discrete assessment methods.

The individual assessment methods will have the following grades:

Assessment method 1: Work-based project report and presentation with questions and answers

- Fail
- Pass
- Distinction

Assessment method 2: Professional discussion underpinned by a portfolio of evidence

- Fail
- Pass
- Distinction

Performance in the EPA will determine the overall apprenticeship standard and grade of:

- Fail
- Pass
- Distinction

EPA summary table

On-programme (typically 24 months)	Training to develop the occupation standard's knowledge, skills and behaviours.
End-point Assessment Gateway	<ul style="list-style-type: none"> • Employer is satisfied the apprentice is consistently working at, or above, the level of the occupational standard. • English/mathematics Level 2 <p>Apprentices must complete:</p> <ul style="list-style-type: none"> • a portfolio of evidence.
End Point Assessment (which would typically take 5 months)	<p>Assessment Method 1: Work-based project report and presentation with questions and answers</p> <p>With the following grades:</p> <ul style="list-style-type: none"> • Fail • Pass • Distinction <p>Assessment Method 2: Professional discussion underpinned by a portfolio of evidence</p> <p>With the following grades:</p> <ul style="list-style-type: none"> • Fail • Pass • Distinction

Length of end-point assessment period:

The EPA must be completed within an EPA period typically lasting 5 month(s), beginning when the apprentice has passed the EPA gateway.

The portfolio should be submitted to the EPAO at the Gateway.

If the apprentice fails any parts of the assessment method, it should be retaken within the typical EPA period in-line with the requirements set out in this assessment plan.

Order of assessment methods

The assessment methods can be delivered in either order.

Gateway

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

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

English and mathematics at level 2.

For those with an education, health and care plan or a legacy statement, the apprenticeship's English and mathematics minimum requirement is Entry Level 3 and a British Sign Language qualification is an alternative to English qualifications for those for whom this is their primary language.

For the Work-based project report and presentation with questions and answers, the apprentice will be required to submit:

- The project title and brief summary which is submitted to the EPAO at the Gateway.

The project title and brief summary requirements are as follows:

- The apprentice will scope out and provide a brief summary of what the project will cover and will submit this to the EPAO at the Gateway. This should demonstrate that the work-based project report will provide sufficient opportunity for the apprentice to meet the assessment criteria. The brief summary is not assessed and will typically be no longer than 500 words.
- The brief summary need to include a summary of the project plan, research requirements, an overview of how the project will be planned including timeframes and the date that the work-based project report has to be submitted to the independent assessor taking into account the deadlines stipulated within this assessment plan.

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

- A portfolio of evidence which is submitted to the EPAO at the Gateway.

The portfolio of evidence requirements are as follows:

- The apprentice will have prepared a portfolio of evidence during the on-programme phase to support the professional discussion. The format and structure of the portfolio must be agreed between the employer and apprentice and will be presented electronically.
- The portfolio of evidence will be submitted to the EPAO at the gateway.
- Reflective accounts and self-evaluation cannot be included as evidence.

- The portfolio should contain written accounts of activities that have been completed and referenced against the knowledge, skills and behaviours, supported by appropriate evidence, such as video/audio extracts; written statements; project plans; reports; minutes; observation reports; presentations; feedback from managers, supervisors or peers; papers or reports written by the apprentices; performance reviews.
- The content must be sufficient to evidence the apprentice can apply the knowledge, skills and behaviours required as mapped to assessment method 2 (Professional Discussion). There must be at least one piece of evidence relating to each knowledge, skill and behaviour mapped to assessment method 2. One piece of evidence can be referenced against more than one knowledge, skill or behavioural requirement. It is expected that there will be typically be a minimum of 10 pieces and a maximum of 15 pieces of evidence.

Assessment methods

Assessment Method 1: Work-based project report and presentation with questions and answers (This Method has 2 components.)

Method 1 Component 1: Work-based project

Overview

The work-place project report is compiled after the apprentice has gone through the Gateway process.

The work-based project report should be designed to ensure that the apprentice's work meets the needs of the business, is relevant to their role and allows the relevant KSBs to be demonstrated for the EPA. Therefore the project's subject, title and scope will be agreed between the employer and the EPAO. The employer will ensure it has a real business application and the EPAO will ensure it meets the requirements of the EPA (including suitable coverage of the KSBs assigned to this assessment method).

The work-based project report represents the skills, knowledge and behaviours mapped to this method. It provides a substantive evidence base from a business-related project to demonstrate the application of knowledge, skills and behaviours. The work-place project will take place after the apprentice has entered the gateway. Each work-place project must enable the following to be demonstrated:

- the application of knowledge, skills and behaviours mapped to this method
- the approach to planning and completion of the work-based project

The work-based project may be based on any of the following (these are examples):

- review and implement a change plan to improve efficiency within the workplace
- review current practice in order to ensure cost savings
- evaluate a working practice and make recommendations on how this can be used to performance at work

A work-based project title and brief summary will be submitted to the EPAO at the gateway. This can be done via email. The EPAO will sign the project title and brief summary off within two weeks. Once the project title and brief summary have been signed off by the EPAO, the project and report write up must be completed and submitted to the EPAO within 12 weeks. It is envisaged that the project will typically take 8 weeks to research and the report write-up will typically take up to a further 4 weeks.

The rationale for this assessment method is:

This assessment method has been selected as it is the most valid method to assess competency as Individuals in this occupation will undertake projects. This method will enable apprentices to demonstrate a range of KSBs on a real piece of work, which will add value to their employer. Employers have stated that any project that delivers real margin benefit to the business will be supported by businesses. This means it is also cost effective.

Delivery

Once the EPAO has signed off the work-place project title, brief summary and terms of reference, apprentices will conduct the work-based project.

The employer will ensure the apprentice has sufficient time and the necessary resources, within the EPA period, to plan and undertake the work-based project.

The apprentice will need to consider the availability of company and external resources required to complete the work-based project. They must also ensure they are fully aware of the KSBs the work-based project intends to assess as that is what the grading of the work-based project will be based on. The work-based project is likely to incorporate a stage review process. This is likely to be a monthly progress review with the employer, at the employer's request, to ensure the work-based project and resources are on track as per the original terms of reference.

Whilst completing the work-based project report the apprentice should be subject to the supervision arrangements outlined below:

- Normal line management controls. The apprentice may work as part of a team which could include technical internal or external support however the report will be the apprentices own work and will be reflective of their own role and contribution.

Apprentices will conduct a work-based project and submit an electronic or paper-based report to the EPAO after a maximum of 12 weeks following confirmation that the EPAO has signed off the project title and brief summary.

Apprentices must produce a report of 4,500 words (+/- 10%), excluding references, appendices and diagrams, based on a work-based project. The word count of 4,500 words is set to encourage the use of graphs and diagrams to present findings as this reflects workplace expectations. The work-based project report must include a one-page summary outlining recommendations (included in the word count). The work-based project report must provide an opportunity for the apprentice to provide evidence of the knowledge, skills and behaviours mapped to this assessment method. All work relating to the work-based project (including any research undertaken) and report write-up, must be completed during the EPA period.

The following should be included in the work-based project report:

1. Background and introduction
2. Outline of the key issue, challenges or opportunity
3. Justification and scope for the work-based project
4. Evidence of effective research
5. Potential benefits (cost saving, improved productivity, quality) and drawbacks including commercial, contractual and organisational etc.
6. Potential risks
7. Consideration of legislation, regulation, industry and organisational policies, procedures and requirements
8. Proposed plan for implementation and work breakdown structure
9. Stakeholder engagement
10. Measures of success

11. One-page summary outlining recommendations

The project report must map, in an appendix, how it evidences the relevant KSBs for this assessment method.

Marking

The independent assessor will review the work-based project report in a timely manner, as determined by the EPAO, and without extending the EPA unnecessarily. Similarly, all quality control processes will also be conducted in a timely manner, as determined by the EPAO.

Required supporting material

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

- Marking sheet
- Feedback template to provide feedback to the apprentice
- A guidance document for employers and apprentices on how the assessment will take place, including timescales.

Method 1 Component 2: Presentation with questions and answers

The independent assessor must review the project report before the presentation with questions and answers. The work-based project report and presentation with questions and answers will be graded together as one assessment method. The presentation with questions and answers should be scheduled to take place as soon as possible after the work-based project has been reviewed.

Overview

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

The presentation will be based on the apprentice's work-based project report and will cover:

- A summary of the work-based project and the apprentice's role and level of responsibility
- The key issues or challenges on the project and how they were met
- The practical application of relevant knowledge, skills and behaviours
- The options considered, solutions identified and reasons why some options were not feasible
- What the apprentice achieved and how this was achieved.

The presentation will be completed and submitted after the gateway and will be presented to an independent assessor, either face-to-face or via online video conferencing. If using an online platform, EPAOs must ensure appropriate measures are in place to prevent misrepresentation.

The apprentice will prepare, complete and submit the presentation to the independent assessor 10 days before the presentation.

The rationale for this assessment method is:

The presentation is part of the overall "Work-based Project and Presentation" assessment method. The rationale behind the use of the presentation element is that it replicates the work undertaken by competent individuals in this profession. They are expected to be able to make presentations to individuals and groups. The presentation allows the project to be explored in more depth.

Delivery

The presentation with question and answers will last for 40 minutes. The presentation will typically last for 20 minutes and the question and answers a further 20 minutes. The independent assessor has the discretion to increase the time of the presentation by up to 10% to allow the apprentice to complete their last point.

The independent assessor will ask a minimum of 5 questions at the end of the presentation. The questions will be drawn from a question bank supplied by the EPAO and those generated by the assessor to confirm the independent assessor's understanding of the presentation and how it demonstrates the relevant knowledge, skills and behaviours. Follow-up questions are allowed to seek clarification.

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

- PowerPoint
- Videos
- Interactive demonstrations
- Computer
- Notes

The presentation will be conducted as follows:

The presentation will take place on a one-to-one basis between the independent assessor and the apprentice.

A copy of the project report and presentation must be sent to the EPAO at least 10 days in advance of the presentation and this must outline details of any visual aids to be used and specify any equipment required. The assessor will review the presentation alongside the project report and prepare questions to be asked at the end of the presentation.

EPAOs must schedule the presentation and questioning elements to take place during the end-point assessment period after the completion of the project report, giving an apprentice a minimum of 10 days' notice of the time, date and venue.

The independent assessor will make all grading decisions. The work-based project report and presentation with questions and answers will be graded holistically as one assessment method.

Venue

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

- employer's premises
- other suitable venue selected by the EPAO (e.g. a training provider)
- Skype

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

The presentation may be conducted face-to-face or via an electronic platform e.g. video-conferencing. EPAOs must ensure appropriate methods to prevent misrepresentation are in place should an electronic option be used, for example, screen share and 360-degree camera function.

Support material

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

- Marking template.
- Feedback template to provide feedback to the apprentice
- Documentation to gather evidence and decisions including grades awarded to ensure consistency of feedback to the apprentice.
- EPAO question bank

Assessment Method 2: Professional discussion underpinned by a portfolio of evidence (This Method has 1 component.)

Method 2 Component 1: Professional Discussion

Overview

This assessment will take the form of a professional discussion, which must be appropriately structured to draw out the best of the apprentice's competence and excellence and cover the KSBs assigned to this assessment method. It will involve questions that will focus on coverage of prior learning or activity and problem solving.

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

- employer's premises
- a suitable venue selected by the EPAO (e.g. a training provider's premises)
- Skype

The rationale for this assessment method is:

This assessment method was selected as a valid way to draw out KSBs, in particular behaviours, which would be less likely to naturally occur in the work-based project and presentation. It is commonplace for people in this occupation to engage in detailed technical discussions, so this assessment method mirrors their day-to-day work.

Delivery

The independent assessor will conduct and assess the professional discussion.

The professional discussion must last for 60 minutes. The independent assessor has the discretion to increase the time of the professional discussion by up to 10% to allow the apprentice to complete their last answer. Further time may be granted for apprentices with appropriate needs in line with the EPAOs Reasonable Adjustment Policy.

During this method, the independent assessor must combine questions from the EPAO's question bank and those generated by themselves.

The professional discussion will be conducted as set out here:

This is a 1:1 conversation in an appropriate environment (a quiet room free from distraction). Evidence must be captured using documentation produced by the EPAO. The assessor will ask a minimum of 12 open questions. Questions can be taken from an EPAO question bank or be those generated by the independent assessor. Follow up questions can be used to draw out further evidence.

The apprentice should be encouraged to refer to their portfolio of evidence during the professional discussion to support their responses. The independent assessor should have a minimum of 10 days to review the contents of the portfolio in order to generate appropriate questions.

Video conferencing can be used to conduct the professional discussion, but the EPAO must have processes in place to verify the identity of the apprentice and ensure the apprentice is not being aided in any way e.g. use of a 360 degree camera to allow the assessor to look around the room during the interview.

The independent assessor must use the assessment tools and procedures that are set by the EPAO to record the professional discussion.

The independent assessor will make all grading decisions.

Venue

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

Other relevant information

A structured specification and question bank must be developed by EPAOs. The 'question bank' must be of sufficient size to prevent predictability and review it regularly (and at least once a year) to ensure that it, and its content, are fit for purpose. The specifications, including questions relating to the underpinning knowledge, skills and behaviours, must be varied yet allow assessment of the relevant KSBs.

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

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

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

- Documentation to gather evidence and decisions including grades awarded.
- EPAO question bank

Weighting of assessment methods

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

Grading Descriptors

Assessment method 1: Work-based project and presentation with questions and answers

KSBs	Fail	Pass (all criteria to be met)	Distinction (all criteria to be met)
K1 K2 K3 K4 K7 K8 K12 K13 K16 S1 S2 S3 S4 S5 S7 S8 S11 S12 S13 S14 S19 B2 B6 B10 B11	Does not meet the pass criteria	<p>Explain how they apply relevant regulations, policies and protocols to the information that they manage and process. (K1, S1)</p> <p>Explains how the concept of the Common Data Environment (CDE) impacted on the project and how they maintained integrity and ensured data remained secure. (K2, K8, S2)</p> <p>Describes the information storage and exchange processes used in the job role and the different models within them such as digital, 3D etc; including how this is analysed in order to validate accuracy (K3, S3)</p> <p>Identifies and outlines the security accreditations (such as List N and List X) and the classifications for them; and they are evaluated in order to make recommendations for future resource planning for information management requirements. (K4, S4)</p> <p>Describes how basic engineering, construction, asset, procurement and operational systems impact on the execution of the job</p>	<p>Develops and categorises analysed processes for data that are appropriate and authentic and details how this is stored throughout the project or asset; making recommendations for changes to processes in order to meet audit requirements. (S3, S7)</p> <p>Explains when they have identified a risk to data integrity and security, detailing what recommendations were made and what actions were taken by the organisation to minimise any on-going and future risks. (S5)</p> <p>Generates new timely design control processes and workflows for a project within their organisation, revising where necessary to maintain clear and accurate version control reports and audit histories. (S8, S11)</p>

		<p>role and how the information is handed over to the end user, meeting quality acceptability requirements. (K7, K12, S14)</p> <p>Describes the scope of responsibilities regarding information management within the job role and why it is important to be flexible whilst focussing on the end result. (K13, B6)</p> <p>Explains risk management approaches and how they relate to information management and where they have identified and managed a risk. (K16, S5)</p> <p>Describes how they validate, manage, disseminate and store information throughout all stages of a project or asset through embedding consistent data control processes and workflows and preparing and delivering timely written and verbal reports. (S7, S8, S11)</p> <p>Evaluates information sharing and storage issues using analytical skills in order to provide solutions that meet both contractual and regulatory requirements. (S12, S13, B2, B11)</p> <p>Explains how they evaluate their own work and its impact on the organisation and what actions they take to improve performance. (S19, B10)</p>	
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Assessment method 2: Professional discussion underpinned by a portfolio of evidence

KSBs	Fail	Pass	Distinction
K5 K6 K9 K10 K11 K14 K15 K17 K18 K19 S6 S9 S10 S15 S16 S17 S18 B1 B3 B4 B5 B7 B8 B9	Does not meet the pass criteria	<p>Describes how to design and implement project management and asset management systems to be consistent with effective contractual arrangements. (K5, K15)</p> <p>Describe the types and styles of communication and business reports, presentations and training events that they would use to draft work plans and strategies including where they have delegated work and/or responsibilities in relation to management of information. (K6, S6)</p> <p>Describe a range of solutions and formats for information planning and management and why secure access and integration is important. (K9, K17)</p> <p>Provides examples of line management principles, allocation of duties and work scheduling and how they apply them in order to establish and maintain effective relationships with colleagues, clients, and stakeholders at all levels. (K10, K14, B3)</p> <p>Describes how delegated budgets can be effectively managed and the techniques they use in their role. (K11)</p> <p>Describes the purpose of supply chain competency</p>	<p>Evaluates a range of solutions for the creation, storage and validation of information; detailing where it can be merged and analysing secure access making recommendations on where this access needs to be changed. (S15)</p> <p>Explains when they have designed and implemented a project management system and what actions they took in order to meet customer requirements, contractual arrangements and commercial implications. (S10)</p> <p>Analyses secure access making recommendations on when this access needs to be changed. (S15)</p>

		<p>assessment and how this meets information delivery requirements. (K18)</p> <p>Explains how they would use a solution or format for the creation, dissemination, storage, validation and merging of information, ensuring secure access and effective integration; applying security accreditations relating to job role and establishing project and asset systems as required in the job role. (S9, S10, S15)</p> <p>Explains how they have prepared and delivered training on information management to internal and external stakeholders. (S16).</p> <p>Explains how they demonstrate commitment to equality and diversity in their role working with clients and stakeholders. (B1, B4)</p> <p>Describes how they manage a delegated budget to estimate resources, manpower and associated costs to ensure compliance with baseline and changes to scope for future development and innovation requirements. (K11, S17)</p> <p>Explains how they ensure a safe, secure and healthy working environment through personal responsibility and behaviour (B7)</p> <p>Explains the importance of continual professional development and their approach to this. (B8, B9)</p> <p>Explains when they have led a team and describes how they used coaching and</p>	
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		mentoring skills in order to support the development of individuals within the team to improve both their individual and team performance. (S18, B5)	
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Overall EPA grading

All EPA methods must be passed for the EPA to be passed overall.

To achieve a pass, the apprentice must achieve a pass in both assessment methods

To achieve a distinction, the apprentice must achieve a distinction in both assessment methods by meeting all pass and all distinction descriptors.

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

Assessment method 1: Work-based project and presentation with questions and answers	Assessment method 2: Professional Discussion underpinned by a portfolio of evidence	Overall grading
Fail	Fail	Fail
Fail	Pass	Fail
Pass	Fail	Fail
Fail	Distinction	Fail
Distinction	Fail	Fail
Pass	Pass	Pass
Pass	Distinction	Pass
Distinction	Pass	Pass
Distinction	Distinction	Distinction

Roles and responsibilities

Role	Responsibility
Apprentice	As a minimum, apprentices should: <ul style="list-style-type: none"> • Complete the on-programme element of the apprenticeship • Prepare for and complete the EPA • Undertake 20% off-the-job training as arranged by the employer and training provider
Employer	As a minimum, employers should: <ul style="list-style-type: none"> • Identify when the apprentice is ready to pass the gateway and undertake their EPA • Notify the EPAO that the apprentice has passed the gateway
EPAO	As a minimum EPAOs should: <ul style="list-style-type: none"> • Provide training and CPD to the independent assessors they employ to undertake the EPA • Have no direct connection with the apprentice, their employer or training provider i.e. there must be no conflict of interest • Have processes in place to conduct internal quality assurance and do this on a regular basis • Organise standardisation events and activities in accordance with this plan's IQA section • Organise and conduct moderation of independent assessors' marking in accordance with this plan • Have, and operate, an appeals process
Independent assessor	As a minimum an Independent assessor should: <ul style="list-style-type: none"> • Be independent of the apprentice, their employer and training provider(s) i.e. there must be no conflict of interest • Hold or be working towards an independent assessor qualification e.g. A1 and have had training from their EPAO in terms of good assessment practice, operating the assessment tools and grading • Have the capability to assess the apprentice at this level • Attend the required number of EPAOs standardisation and training events per year (as defined in the IQA section)
Training provider	As a minimum the training provider should: <ul style="list-style-type: none"> • Work with the employer to ensure that the apprentice is given the opportunities to develop the KSBs outlined in the standard and monitor their progress during the on-programme period • Advise the employer, upon request, on the apprentice's readiness for EPA prior to the gateway • Plays no part in the EPA itself

Internal Quality Assurance (IQA)

Internal quality assurance refers to the requirements that EPA organisations must have in place to ensure consistent (reliable) and accurate (valid) assessment decisions. EPA organisations for this EPA must:

- appoint independent assessors who have knowledge of the following occupational areas: Experience in establishing and managing systems that effectively manage information for a complex project involving more than 1 stakeholder and using relevant software.
- appoint independent assessors who have recent relevant experience of the occupation/sector at least one level above the apprentice gained in the last three years or significant experience of the occupation/sector.
- appoint independent assessors who are competent to deliver the end-point assessment
- provide training for independent assessors in terms of good assessment practice, operating the assessment tools and grading
- have robust quality assurance systems and procedures that support fair, reliable and consistent assessment across the organisation and over time.
- operate induction training for independent assessors when they begin working for the EPAO on this standard and before they conduct an End Point Assessment.
- Ensure that Independent assessors attend at least 1 standardisation event per year.

Re-sits and re-takes

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

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

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

Any assessment method re-sit or re-take should be taken within 6 months, otherwise the entire EPA must be taken again, unless in the opinion of the EPAO exceptional circumstances apply outside the control of the apprentice or their employer.

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

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

Affordability

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

- Using an employer's premises
- Skype
- Implementing a project with real business benefits.

Professional body recognition

Professional body recognition is not relevant to this occupational apprenticeship.

Reasonable adjustments

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

Mapping of knowledge, skills and behaviours (KSBs)

Assessment method 1: Work-based project and presentation with questions and answers

Knowledge
K1 Regulations, data protection, protocols, standards, and guidelines relating to effective management and control of information and how they are applied in the organisation
K2 Understanding of the concept of the Common Data Environment (CDE) as the primary source of information used by stakeholders to collect, manage and disseminate information, whether this is through one or multiple systems of record
K3 Information storage and exchange processes, systems and outputs within a team and across a project and asset. Principles of the mechanisms for formal and informal information distribution, whether this is complex models (such as 3D) or documentation/data (using mechanisms like COBie), use of workflow for digital delivery of information through business processes, and information types and how/where these are stored.
K4 The details and implications of security accreditation, ISO27001, PAS 1192 Part 5 and industry specific requirements such as List N (Nuclear) and List X (Defence) and information classification such as sensitive and classified
K7 Basic engineering, construction, asset, procurement and operational systems and the role they play in the execution of projects and how information flows between these systems
K8 Understanding of information standards as they relate to implementation and compliance of requirements and how these might impact systems that manage the CDE
K12 Processes to securely hand over information in a manner that supports the future management of the asset
K13 Scope of responsibilities for the management of information
K16 Principles of risk management and processes for mitigating risk

Skills
S1 Proficiently apply regulations including data protection, standards, guidelines and quality requirements as they pertain to information process and output
S2 Assist with the operation and maintenance of a Common Data Environment (CDE) and ensure the (CDE) maintains integrity and follows agreed protocols and that data remains secure
S3 Establish processes and accurately analyse, audit, verify and validate data as being accurate, appropriate, attributable, authentic and relevant according to protocols
S4 Evaluate and make recommendations around information work processes, quality improvement and future resource planning for information management requirements

S5 Identify and manage risk, put in place mitigating actions to minimise risk data integrity and security
S7 Validate, manage, disseminate and store information throughout all stages of a project or asset
S8 Design and embed consistent data control processes and workflows accounting for status, maturity, version control, revision control, audit history and approval processes
S11 Prepare and deliver timely, accurate and clear written and verbal reports
S12 Define and implement solutions to information sharing and storage problems
S13 Evaluate requirements and provide solutions for embedding contractual and regulatory requirements
S14 Define and manage processes for staged and progressive handover of information and structured formats in line with delivery schedules, duly verified to meet quality acceptability requirements
S19 Reflect and evaluate own work and its impact on the organisation to plan for improved performance

Behaviours

B2 Demonstrate analytical skills to effectively solve problems
B6 Maintain a focus on the end result and be flexible while adopting a lean and agile approach
B10 Adopt a reflective approach to evaluating own work and its impact on the organisation to plan for improved performance
B11 Maintain an open mind, be inquisitive and apply learning to take advantage of innovation and new methods of working

Assessment method 2: Professional discussion underpinned by a portfolio of evidence

Knowledge
K5 How to design and implement project management and asset management systems incorporating specification of requirement, definition of process, configuration and approach
K6 Types and styles of communication and business reports, presentations and training events
K9 Range of solutions and formats for the design, procurement, creation, building, operation, storage, validation, dissemination, inter-operability and merging of information and to provide secure access and integration
K10 Line management practice and principle and how they are applied in the organisation
K11 Estimation and budget management techniques that ensure income and expenditure
K14 Practice and principle of allocation of duties and work scheduling and how they operate in the organisation
K15 Contractual and commercial implications relating to the management of information
K17 Concept of information planning, what is required and at what lifecycle stage
K18 Supply chain competency assessment to meet information delivery requirements
K19 The importance of reflection and evaluation of own work and their impact on the organisation

Skills
S6 Draft work plans, strategies, delegate responsibilities and work instructions defining the scope of information management that comply with aims, objectives, planned milestones and organisation procedure
S9 Advise on the implications of security accreditation, ISO27001, PAS 1192 Part 5 and industry specific requirements such as List N (Nuclear) and List X (Defence) and information classification
S10 Establish and consistently implement project and asset systems including specification requirements, definition of processes, configuration and appropriate training plans
S15 Effectively use a range of solutions and formats for the creation, dissemination, storage, validation and merging of information, ensuring secure access and effective integration
S16 Prepare and deliver effective training on information management to internal and external stakeholders, monitor the effectiveness of this training and reflect on feedback to inform continuous quality improvement within the scope of responsibility
S17 Estimate resources, manpower and associated costs to ensure compliance with baseline and changes to scope for future development and innovation requirements
S18 Apply principles of effective line management in line with organisation practice

Behaviours
B1 Act professionally, show commitment to the industry and employer and work collaboratively across multiple disciplines
B3 Establish and maintain effective relationships with clients, internal and external stakeholders and colleagues at all levels
B4 Demonstrate a commitment to equality, diversity and inclusion, and act ethically with integrity and respect
B5 Committed to lead, manage and coach others effectively
B7 Foster a safe, secure and healthy working environment through personal responsibility and behaviour
B8 Effective self-manage, prioritise and proactively approach work and continuous professional development
B9 Flexible to changing working environment and demands, resilient under pressure