

End-point assessment plan for **Historic Environment** **Advisor** apprenticeship standard

Apprenticeship standard number	Apprenticeship standard level	Integrated end-point assessment
ST0831	7	No

Contents

Introduction and overview	2
EPA summary table	3
Length of end-point assessment period.....	4
Gateway	4
Order of assessment methods	6
Assessment methods.....	6
Weighting of assessment methods	12
Grading	12
Re-sits and re-takes	18
Reasonable adjustments	19
Roles and responsibilities	20
Internal Quality Assurance (IQA)	22
Affordability	22
Professional body recognition	22
Mapping of knowledge, skills and behaviours (KSBs)	23

Introduction and overview

This document sets out the requirements for end-point assessment (EPA) for the **Historic Environment Advisor** 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 **Historic Environment Advisor** apprentices, their employers and training providers.

Full time apprentices will typically spend **36** months on-programme (before the gateway) working towards the occupational standard, with a minimum of 20% off-the-job training. All apprentices must 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 can be evidenced to an EPAO.

As a gateway requirement and prior to taking the EPA, apprentices must achieve all approved qualifications mandated in the **Historic Environment Advisor** standard.

These are:

- **A Masters degree in a relevant Conservation or Archaeology of the Historic Environment or Heritage specialism e.g. Conservation of the Historic Environment, Cultural Heritage Management, Historic Building Conservation, Archaeology of Buildings.**

For level 3 apprenticeships and above apprentices without English and mathematics at level 2 must achieve level 2 prior to taking their EPA. British Sign Language (BSL) qualifications are an alternative to English qualifications for those who have BSL as their primary language.

The EPA must be completed within an EPA period lasting typically **6 month(s)**, after the EPA gateway.

The EPA consists of **2** discrete assessment methods.

The individual assessment methods will have the following grades:

Assessment method 1: Project with questioning

- Fail
- Pass
- Distinction

Assessment method 2: Professional discussion underpinned by portfolio

- Fail
- Pass
- Distinction

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

- Fail
- Pass
- Distinction

EPA summary table

On-programme (typically 36 months)	Training to develop the occupation standard's knowledge, skills and behaviours (KSBs).
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. <p>Apprentices must achieve the following approved qualifications mandated in the occupational standard:</p> <ul style="list-style-type: none"> A Masters degree in a relevant subject (see Gateway section below). English and mathematics Level 2 <p>Apprentices must complete:</p> <ul style="list-style-type: none"> The employer and the apprentice must agree the outline, scope and subject of their project and submit it to the EPAO for approval at the gateway. At the gateway apprentices must submit a portfolio of evidence to the EPAO. It is for the apprentice, in discussion with their employer, to decide when the portfolio is complete and ready for submission to the EPAO.
End-point assessment (which will typically take 6 months)	<p>Assessment method 1: Project with questioning</p> <p>With the following grades:</p> <ul style="list-style-type: none"> Fail Pass Distinction <p>Assessment method 2: Professional discussion underpinned by portfolio</p> <p>With the following grades:</p> <ul style="list-style-type: none"> Fail Pass Distinction
Professional recognition	<p>Aligns with recognition as:</p> <ul style="list-style-type: none"> A Member with Chartered Institute for Archaeologists A Chartered Member with Chartered Institute of Building

Length of end-point assessment period

The EPA will be completed within an EPA period lasting typically of **6 month(s)**, after the EPA gateway. Any supporting material which underpins an EPA assessment method should be submitted on entry to the gateway.

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.

Apprentices must achieve the following approved qualifications as mandated in the occupational standard:

- For level 3 apprenticeships and above apprentices without English and mathematics at level 2 must achieve level 2 prior to taking their EPA. British Sign Language (BSL) qualifications are an alternative to English qualifications for those who have BSL as their primary language.
- A Masters degree in a relevant Conservation or Archaeology of the Historic Environment or Heritage specialism e.g. Conservation of the Historic Environment, Cultural Heritage Management, Historic Building Conservation, Archaeology of Buildings.

For **Project with questioning**, the apprentice will be required to submit:

- The employer and the apprentice must agree the outline, scope and subject of their project report and submit it to the EPAO for approval at the gateway. The EPAO will then confirm that the proposed project is appropriate within 2 weeks of the gateway. This must occur before the apprentice commences work on the project. The project must be designed to suit the role of the apprentice within the organisation and the work needs of the employer. The project must be a genuine piece of project work that is conducted on behalf of the employer, and subject to the employer's expected standards and quality.
- It is recommended that the employer discusses the intended project details with the EPAO before the gateway, who will also provide guidance about selecting a project to the employer and apprentice.

For **Professional discussion underpinned by portfolio**, the apprentice will be required to submit:

- At the gateway, apprentices must submit a portfolio of evidence to the EPAO. It is for the apprentice, in discussion with their employer, to decide when the portfolio is complete and ready for submission to the EPAO. The evidence collected in the portfolio should cover all of the KSBs assigned to the professional discussion assessment and the employer must have signed off the portfolio as a valid record of the apprentice's own work.
- The EPAO will review the portfolio within a maximum 4 week period from the gateway. Once

read and reviewed, the independent assessor will send the proposed plan of assessment for the professional discussion to the apprentice. This will clarify all roles and responsibilities as they pertain to professional discussion. A minimum of 2 weeks must be allowed between the independent assessor sharing the assessment plan for the professional discussion with the apprentice and the professional discussion being conducted.

- Apprentices could choose to submit the portfolio evidence in a way which suits their own personal learning style, such as by:
 - Hard copy portfolio: A physical folder which the apprentice can run through during the questioning to show examples of the work.

or

- Digital portfolio: Apprentices may choose to produce this on their computer, provided they are able to share this with the EPAO at the gateway and can refer to it during the professional discussion if needed. This could either be completed using presentation software, or other suitable method depending on the apprentice, provided it can be easily accessed. EPAOs may choose to use their own online portfolio system to support this if they choose.

Evidence in the portfolio must be drawn from at least 2 contrasting projects which the apprentice has worked on during the apprenticeship. By 'contrasting' it is meant that these projects must show variation in the place, site, building or landscape, and purpose of project (e.g. two listing recommendation projects are not acceptable). This provides breadth of coverage of the KSBs. There must be sufficient evidence in the portfolio to support all the KSBs being assessed by this method, and the evidence must be mapped to the relevant KSBs in the appendix (see below). Evidence may be used to demonstrate more than one KSB; a qualitative as opposed to quantitative approach is required. There must be at least one piece of evidence relating to each knowledge, skill and behaviour mapped to this assessment method, this means there will typically be ten pieces of evidence in the portfolio. One piece of evidence can be referenced against more than one knowledge, skill or behavioural requirement. The portfolio will evidence all relevant KSBs mapped to the professional discussion assessment method. The portfolio is used to underpin this assessment method and is not directly assessed.

- The portfolio is expected to typically contain (examples not a definitive list, other evidence sources allowable):
 - Product Evidence: project or assessment reports, surveys, drawings, results of analysis
 - Witness testimonies from colleagues, clients or senior managers (any employer contributions should focus only direct observation of evidence (for example witness statements) rather than opinions)
 - Evidence of communications
 - Images or videos of work undertaken (to a maximum of 30 minutes and/or 20 images. This does not include the images delivered as product evidence or case studies)
 - Case studies which include critical evaluation
 - Authentication of portfolio by employer.

Order of assessment methods

The assessment methods can be delivered in any order, but it is recommended that the project is completed first. If the project report is completed first, there may be an opportunity to conduct the Professional Discussion and the questioning for the project on the same day and by the same assessor (after the review period for the project has passed), and this should be considered to ensure the end-point assessment is cost-effective.

Assessment methods

Assessment method 1: Project with questioning (This assessment method has 2 components.)

Assessment method 1 component 1: Project

Overview

The project is compiled after the apprentice has gone through the gateway.

The work-based project should be designed to ensure that the apprentice's work meets the needs of the business, is relevant to their role and allows the relevant KSBs to be 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 EPAO should sign-off the project title to confirm its suitability prior to the project commencing, this will be within 2 weeks of the gateway.**

The rationale for this assessment method is:

This assessment method has been chosen as it is fundamental to what the apprentices will be doing on a day to day basis. Historic Environment Advisors regularly have to produce reports of different types for different audiences throughout their careers. A detailed report focusing on a Historic Environment Advice project will be an effective way by which apprentices will be able to assess, analyse and evaluate what they have worked on, enabling them to demonstrate their underpinning knowledge, specialist skills and their role in the decision making for a specific project.

Delivery

Apprentices will conduct a project in the form of **a report**.

The employer and the apprentice must agree the outline, scope and subject of their project and submit it to the EPAO for approval at the gateway. The EPAO will then confirm that the proposed project is appropriate within 2 weeks of the gateway. This must occur before the apprentice commences work on the project. The project must be designed to suit the role of the apprentice within the organisation and the work needs of the employer. The project must be a genuine piece of project work that is conducted on behalf of the employer, and subject to the employer's expected standards and quality.

Apprentices will need to be supported in identifying the suitable project. It is expected that the project subject will be identified in conjunction with their supervisor to ensure that it is of sufficient depth and is not being formally assessed as part of a different assessment process. The employer will ensure the apprentice has sufficient time and the necessary resources, within this period, to plan and undertake the project (e.g. any potential constraints such as permissions or practical access to datasets that might prevent the apprentice completing the project report within the allowed time period must be resolved prior to the project being agreed).

The project will be conducted as set out here:

The project is compiled after the apprentice has gone through the gateway process. The apprentice will conduct their project and submit it to the EPAO after a maximum of 10 weeks of the project title being agreed.

Whilst completing the project, the apprentice should be subject to the supervision arrangements outlined below:

The employer will be responsible for supervising the project, setting key milestones for the completion of different phases of the project, making sure that the apprentice has sufficient time and the necessary resources to plan and undertake the project. The project should take typically 8 weeks of the apprentice's time within the 10 weeks allowed.

The project (including the appendices) should be submitted electronically to the EPAO. When the project is submitted, the employer and the apprentice should verify the submitted work is that of the apprentice.

Project content

The project should be of a type, and on a subject, which the apprentice would encounter during their usual work practice, for example, an assessment, research, scoping or recommendation project which will involve significant independent thought concerning the approaches and methodologies used and the conclusions reached. The report is a new piece of work which commences after the apprentice has passed the gateway. However, the project report may be based on a dataset the apprentice has encountered during their apprenticeship, for example, it may use a Historic Environment Record dataset which the apprentice has used previously.

The project report should provide a final formal document or work product which the project has achieved (e.g. a Listing or Designation recommendation, or a chapter or section of a larger work such as an Environmental Impact Assessment) as the appendix, with the main body of the report providing the background research and methods used to create the final document. This reflects genuine work practice, in which a Historic Environment Advisor would select or develop a methodology for the research, identify sources for the research, select or develop a method of analysis and identify the appropriate standards for the work, prior to embarking on the research itself to support their final contribution to a formal work product for external stakeholders. The report should provide an outline of the project from inception through to completion. The apprentice should seek to articulate their underpinning knowledge of the theory and practice relevant to their specialism and professional judgement and ethics.

Example project titles might include:

- 'Listing recommendation for 2 High Street, Newtown, Essex';
- 'Scoping chapter for Environmental Impact Assessment for proposed housing development at Newtown, Essex';
- 'Statement of Universal Value for World Heritage Site at Newtown, Essex',

- 'Evaluation framework for measuring the benefits of a restoration project at Newtown, Essex';
- 'Feasibility study for reuse of a Listed Building in Newtown, Essex',
- 'Audience development plan for the Scheduled Monument at Newtown, Essex'.

As a minimum the project report must include:

- 1) Summary:** Provide a brief outline of the report and the work presented, including final document produced.
- 2) Introduction:** Outline relevant background information such as the type of place and project under consideration, and the datasets used. Summarise previous work and explain what lead to the current research and the circumstances for this project.
- 3) Aims:** Explain the aims of the project undertaken and the purpose of the work.
- 4) Methods:** Describe the approaches, methods and procedures used to procure the final document and explain and justify why these were selected. This section should also include consideration of health and safety risks and their mitigation and a discussion of relevant policy frameworks and professional standards.
- 5) Conclusion:** summary of the outcomes/ results and implications of the findings for the stakeholder/ client.
- 6) Appendices:** these must include (a) final document or work product, (b) mapping of how project evidences the relevant KSBs for this assessment method.

The project report has a word count of 5,000 words. A tolerance of plus or minus 10% is allowed. Appendices, references, diagrams, and the final document or work product will not be included in this total.

Marking

The independent assessor will review and mark the project report and questioning holistically and in a timely manner (recommended time period is 1 month), 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.

The independent assessor may consult with an independent technical expert where clarification is needed concerning specialist content within the project. Clarification will be sought for this reason only. The assessment decision is made solely by the independent assessor. Any technical expert that is utilised in this role must have no direct connection with, and be independent of, the candidate and employer.

Supporting material

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

- **Project selection guidance:** This is to be developed by the EPAO and it will provide practical

guidance for the apprentice and employer on how to select a project of appropriate subject, outline and scope for the assessment.

- **Assessment Preparation Form:** This is to be developed by the EPAO and will be used as the basis for this assessment method. This will include each of the KSB criteria to be assessed by the Project and a space for the topic of the project the apprentice is choosing to undertake. This will allow the apprentice to explain how the project will enable them to evidence the required EPA. This can then be approved by the EPAO prior to initiation of the project.
- **Marking Guidance:** This will detail the specific criteria that assessors must use to mark the apprentices work.
- **Assessment Report:** The EPAO must also develop an appropriate 'Assessment Report', where the summary of assessment decisions resulting from the Project Questioning will be outlined. This will be used as the basis of moderation and the recording of final assessment decisions.

Assessment method 1 component 2: Questioning

Overview

This assessment will take the form of **Questioning** 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 the questions that will focus on clarifying the evidence of those KSBs which may be expanded on via discussion.

The rationale for this assessment method is:

Questions are intended to check the apprentice's knowledge and to provide additional detail to confirm whether the apprentice has failed, passed or achieved a distinction. Questions will be generated by the assessor in response to the specific project report.

Delivery

The apprentice will be given 10 working days notice from the EPAO (or 2 weeks) to prepare for the assessment. The independent assessor will conduct and assess the **Questioning**.

The **Questioning** must last for 30 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 Adjustments policy. The Technical Expert will not attend the questioning component of this method.

During this method, the independent assessor must generate their own questions based on their review of the project report.

The **Questioning** will be conducted as set out here:

The independent assessor will ask a minimum of 6 questions. Additional follow up questions are allowed, to seek clarification and to make an assessment against the grading descriptors.

Questions and responses will be documented in the 'assessment report' to ensure it can be verified.

Video conferencing can be used to conduct the **Questioning**, but the EPAO must have processes in place to verify the identity of the apprentice and ensure the apprentice is not being aided in some way.

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

The independent assessor will make all grading decisions.

Venue

The Questioning should take place in a quiet room, free from distractions and influence. It can take place in any of the following:

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

Supporting material

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

- **Marking Guidance:** This will detail the specific criteria that assessors must use to mark the apprentices work.

Other relevant information

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

Assessment method 2: Professional discussion underpinned by portfolio

(This assessment method has 1 component)

Assessment 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. **The apprentice may use their portfolio to support their responses.**

The rationale for this assessment method is:

This assessment method enables apprentices to cover a wide range of KSBs, which will not naturally be covered by a project, in an effective and efficient way. Linking it back to specific work the apprentice has undertaken through the portfolio will allow the EPAO to effectively determine whether the apprentice is working at the appropriate level by enabling them to draw upon examples of real work they have undertaken which they can use to demonstrate their practical skills, behaviours as well as their underpinning knowledge.

Delivery

The apprentice will be given 10 working days notice from the EPAO (or 2 weeks) to prepare for the assessment. The independent assessor will conduct and assess the professional discussion.

The professional discussion must last for 120 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 Adjustments 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 assessment will take the form of a two-way professional discussion which is underpinned by a portfolio containing evidence for the specific KSBs being assessed by this method. During the

assessment, a minimum of 10 questions will be drawn from both a question bank and those designed by the independent assessor to ensure that each of the KSBs are being assessed in a consistent manner. In responding to these questions, apprentices are expected to refer to their portfolio of evidence, enabling them to provide evidence of work undertaken and demonstrate how they have appropriately understood and applied the KSBs being assessed. Follow up questions may be asked by the assessor if necessary to clarify the apprentice's answers.

The professional discussion 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 work the apprentice has undertaken during their apprenticeship as well as wider questioning to test the apprentice's underpinning knowledge.

The portfolio is not to be assessed but is to be used as the basis of the professional discussion. Video conferencing can be used to conduct the professional discussion, but the EPAO must have processes in place to verify the identity of the apprentice and ensure the apprentice is not being aided in some way.

The 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. It can take place in any of the following:

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

Other relevant information

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

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 judgements.

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

- **Portfolio Guidance:** The EPAO must prepare a document which outlines what the portfolio must contain and how it should be prepared. This must include:
 - **Summary Template:** This is to detail each of the KSBs along one side and provide space for the apprentice to provide a description of the evidence they have attached alongside the evidence.
 - **Advice on how to structure a hard copy or digital portfolio,** indicating software or methods they might find useful.
 - **A summary of the permissible evidence types which the apprentices should expect to include (as outlined above).**
- **Assessment report:** The EPAO must also develop an appropriate assessment report, where the

summary of assessment decisions can be outlined for the professional discussion. This report will record the final assessment decision and will be used as the basis for any moderation.

- **Question bank:** A structured specification and question bank must be developed by EPAOs. This should include standard questions which can be used for each of the KSB for which the apprentice will be providing responses to. The question bank must be of sufficient size to prevent predictability and the EPAO must review it regularly to ensure that it, and its contents, are fit for purpose. The specifications, including questions relating to the underpinning knowledge, skills and behaviours, must be varied yet allow for consistent assessment of the relevant KSBs.

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

Weighting of assessment methods

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

Grading

Assessment method 1: Project with questioning

Fail – does not meet the pass criteria

Pass – meets all the pass criteria

Distinction – meets all the pass criteria and all the distinction criteria

KSBs	Pass grade descriptor	Distinction grade descriptor
K1, K2, K3, K4, K5, K7, K8, K9, K12 S1, S2, S3, S4, S6, S8, B1	Applies knowledge of, and demonstrates ability to work within, the statutory legislation, policies, frameworks, strategies, professional standards, industry best practices and compliance processes relevant to their work within the historic environment, [K1, K2, S1, S2]	Reviews and evaluates the impact of new policies, strategies and perspectives, in order to demonstrate understanding of the significance of the project subject within wider research and sector contexts, and is able to predict the impact of their recommendations. [K1, K2, S1, S2]

	<p>Articulates the significance of conservation principles and archaeological or architectural practice and chronology and how this might influence analysis and decision making [K4, K5]</p> <p>Evaluates established and new techniques for investigation, research, documentation and management of historic environments, and how to monitor others using these techniques. [K3]</p> <p>Provides advice and guidance within the appropriate medium to clients, colleagues and stakeholders within their area of specialism [S3]</p> <p>Analyses the underpinning theory, current academic research and broad research agendas relevant to their project subject [K8]</p> <p>Presents written arguments effectively and demonstrates understanding of the contexts in which evidence for the protection and enhancement of the historic environment is delivered [S4]</p> <p>Designs and implements a project plan. Conducts specialist research, investigations and analysis to make informed decisions. [S6]</p>	<p>Critically evaluates where the application of new techniques for investigation, research, documentation and management of historic environments benefitted, or could have done if applied, the project outcomes. [K3, K8, S6]</p> <p>Evaluates project plan and is able to identify issues relating to specialist research and investigations, justifying how these were considered and how findings will inform future projects. [S6]</p> <p>Critically evaluates and justifies selected methods of giving advice and guidance on the historic environment to demonstrate how their learning generated through the project could inform future projects or have wider sector application. [K7, S8]</p>
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	<p>Produces information on the historic environment using a range of information and uses this information to provide advice and guidance both verbally and through written reports. [K7, K9, S8]</p> <p>Explains workplace and industry standard Health and Safety policies, including risk assessments, and how these relate to industry standards. [K12]</p> <p>Demonstrates how they take reasonable care for the health and safety of themselves and others [B1]</p>	
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Assessment method 2: Professional discussion underpinned by portfolio

Fail – does not meet the pass criteria

Pass – meets all the pass criteria

Distinction – meets all the pass criteria and all the distinction criteria

KSBs	Pass grade descriptor	Distinction grade descriptor
K6, K10, K11, K13, K14, K15, K16, K17, K18 S5, S7, S9, S10, S11, S12, S13, S14, S15 B2, B3, B4, B5, B6	<p>Evaluates professional judgement and ethical behaviour and describes the impact they have achieved when they have shared their knowledge of the historic environment with the public [S10]</p> <p>Explains the impact achieved when they have supported colleagues and internal or external stakeholders, and explain how they achieved the outcome with a focus on quality assurance. [S7, S12]</p> <p>Demonstrates strategic leadership and teamwork in the context of driving change and innovation within the context of organisational, sectoral and wider governmental and commercial strategic priorities relevant to the historic environment. [B4]</p> <p>Justifies how their personal action planning and CPD contributes to advances in practice and the body of knowledge of the historic environment through research, publication, participation in professional and academic networks and events [K10, S11, B3]</p> <p>Identifies new theory, policy and practice and applies it in order to support heritage protection, management and policy development, and to assess their own, and others', gaps in knowledge</p>	<p>Critically evaluates how the raising of awareness, appreciation and understanding of the historic environment and the promotion of good conservation practice is able to bring benefits to a diverse range of stakeholders. [S10]</p> <p>Critically evaluates how their personal action planning and CPD contributes to advances in practice and the body of knowledge of the historic environment by demonstrating active understanding of, and participation in, relevant professional networks [K10, S11, B3]</p> <p>Evaluates and justifies the use of new theory, policy and practice and its application to develop alternative</p>

	<p>and/or skills [K14, S9]</p> <p>Articulates appropriate techniques and materials for the repair of historic buildings and monuments [K15]</p> <p>Explains the principles of sustainability and how they are applied to the historic environment, and explains the contribution of the historic environment to placemaking, planning and economic development within the wider context in which it is carried out [K17, S13, K6]</p> <p>Explains the approaches they have used to achieve successful outcomes when leading different types of projects, including describing how they manage resources and how they have contribute to quality assurance. [K11, S5]</p> <p>Evaluates the professional ethics and codes of conduct involved in the management of projects and the historic environment, including recognising conflicts of interests and appropriate processes for dealing with these. Collaborate with work colleagues and other stakeholders to resolve conflicts of interest and deal with confidential data according to the agreed protocol [B6, K16]</p> <p>Justifies decisions made using a range of data to determine next steps and describe how they have managed their workload when there are multiple sources of data [K18, S15]</p> <p>Justifies the techniques used to communicate with a range of stakeholders to make needs and</p>	<p>ways of strategic working and to address sector-wide challenges. [K14, S9]</p> <p>Evaluates where sustainability principles in the historic environment were, or may have been, able to positively impact the wider outcomes (e.g. socio-economic) of a project [K17, S13]</p> <p>Analyses and justifies the changes made to the management of a complex project in response to external factors. [K11, K18, S5, S9]</p> <p>Evaluates how the professional ethics and codes of conduct involved in the management of projects and the historic environment may impact colleagues and stakeholders in other professions [K16, S15, B3]</p> <p>Identifies situations where the recommendations derived from critical analysis, interpretation and evaluation of complex historic environmental information have the potential to change sector-wide historic environment practice [K18, S15]</p>
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	<p>expectations clear. [K13, B5]</p> <p>Explains when they have presented verbal and written arguments clearly and effectively. [S14]</p> <p>Evaluates when they have acted independently to solve problems which arise when dealing with complex projects [B2]</p>	<p>Critically evaluates communication with colleagues, stakeholders or the public to enhance the professional and public benefit of a project. [K13, S10, B5]</p>
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Overall EPA grading

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

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

Apprentices must pass all pass criteria in both assessment methods in order to pass.

In order to be offered a distinction, apprentices must have met all distinction criteria across both assessment methods in order for a distinction to be awarded.

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

Project with questioning	Professional Discussion underpinned by portfolio	Overall grading
Fail	Any grade	Fail
Any grade	Fail	Fail
Pass	Pass	Pass
Pass	Distinction	Pass
Distinction	Pass	Pass
Distinction	Distinction	Distinction

Any grade = fail, pass, or distinction.

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 must be taken within an additional 4 months from the fail notification, 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.

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.

Roles and responsibilities

Apprentice	<ul style="list-style-type: none"> • participate in development opportunities to improve their knowledge skills and behaviours as outlined in the standard • meet all gateway requirements when advised by the employer • understand the purpose and importance of EPA and undertake EPA
Employer	<ul style="list-style-type: none"> • support the apprentice to achieve the KSBs outlined in the standard to their best ability • determines when the apprentice is working at or above the level outlined in the standard and is ready for EPA • select the EPAO • confirm all EPA gateway requirements have been met • confirm arrangements with EPAO for the EPA (who, when, where) in a timely manner • ensure apprentice is well prepared for the EPA • Should not be involved in the delivery of the EPA
EPAO	<p>As a minimum EPAOs should:</p> <ul style="list-style-type: none"> • appoint independent assessor to conduct the EPA • 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 that is communicated to the Apprentices when the EPA period begins.
Independent assessor	<p>As a minimum an independent assessor should:</p> <ul style="list-style-type: none"> • be independent of the apprentice, their

	<p>employer and training provider(s) i.e. there must be no conflict of interest</p> <ul style="list-style-type: none"> • 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 • attend the required number of EPAOs standardisation and training events per year (as defined in the IQA section)
Independent Technical expert (appointed by EPAO)	<p>When they are appointed by the EPAO, the technical expert will:</p> <ul style="list-style-type: none"> • have no direct connection with the apprentice, their employer or training provider i.e. there must be no conflict of interest • provide independent technical review of the content of the project to the independent assessor, only where required. This will solely be to provide clarification concerning specialist content within the project where required (e.g. if the project contains specialist scientific dating or species identification which requires verification). • not contribute to the general assessment of the project or contribute to the assessment grade. The assessment decision is made solely by the independent assessor. • not attend the Questioning session.
Training provider	<p>As a minimum the training provider should:</p> <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:
 - Be currently practising or have recent relevant experience in a relevant Conservation; or Archaeology of the Historic Environment; or Heritage specialism and able to demonstrate, through academic or professional qualifications and CPD, a level of expertise appropriate to assessing apprentices working at Level 7
 - Be able to demonstrate, through academic or professional qualifications and CPD, an appropriate level of knowledge of the Conservation or Archaeology of the Historic Environment or Heritage specialism / sector in which the apprentice is working. This means direct, recent, experience of the area of practice in a professional context.
 - Have a clear understanding of the Historic Environment Advisor Apprenticeship standard.
 - Appoint independent assessors and technical experts who are competent to deliver the end-point assessment and who meet the following minimum requirements:
 - Be a trained assessor with recognised assessment qualification or be working towards one
 - Have no relationship with the apprentice or the employer.
 - 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 and standardisation events for independent assessors when they begin working for the EPAO on this standard and before they deliver an updated assessment method for the first time
 - ensure all independent assessors attend standardisation events on an ongoing basis and at least once per year for this Standard.

Affordability

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

- using an employer's premises
- using audio-visual remote link where EPAO, employer and apprentice deem this appropriate.
- holding professional discussion and project Q&A on the same day, with the same assessor where possible.

Professional body recognition

This apprenticeship is designed to prepare successful apprentices to meet the requirements for recognition as a:

Member with Chartered Institute for Archaeologists
Chartered Member with Chartered Institute of Building

Mapping of knowledge, skills and behaviours (KSBs)

Assessment method 1: Project with questioning

Knowledge
K1 relevant statutory legislation, policies, frameworks, strategies, and best practice for the historic environment.
K2 standards and compliance processes for the historic environment.
K3 established techniques of investigation, research, documentation and management for the historic environment, as well as new techniques or approaches and their associated risks. How to conduct these techniques, and how to monitor others doing so.
K4 conservation principles and the agents of deterioration, and how to evaluate the significance and condition of the historic environment.
K5 British archaeological or architectural practice and chronology, including expert understanding and recognition of archaeological site or building types, styles, and periods.
K7 when and how to provide advice and guidance, either verbally, through written reports, publication or public speaking.
K8 current academic research, and regional, national and international research agendas, developing and expanding on knowledge within their area of expertise.
K9 editorial, drawing and report writing techniques required within the historic environment.
K12 their Employer's Health and Safety Policy and Procedures and operational procedures, including risk assessment, and how those relate to industry standards.

Skills
S1 contextualise, interpret and apply relevant statutory legislation, policies, frameworks, strategies, and best practice for the historic environment.
S2 establish and monitor implementation of standards and compliance processes for the historic environment.
S3 provide expert advice and guidance to clients, colleagues and stakeholders, exercising appropriate judgement and decision making and recognising when to involve others.
S4 prepare and deliver evidence for the enhancement or protection of the historic environment, including that required for relevant hearings, inquiries, public meetings, appeals, written statements, proofs of evidence and expert witness testimony.
S6 design, execute and monitor project plans and investigations. Conduct specialist research and investigation, reformulate and interpret complex historic environment data to provide specialist analysis.
S8 lead on, produce, review, or update documentation and information on the historic environment using relevant analytical, editorial, drawing and report writing techniques.

Behaviours

B1 take reasonable care for the health and safety of themselves and of others, including members of the public, who may be affected by their acts or omissions at work

Assessment method 2: Professional discussion underpinned by portfolio

Knowledge

K6 wider political, social and economic context of the historic environment and other sectors within the individual's specialist area of work (e.g. construction, planning, design, tourism), their relationship to historic environment decision-making and the roles and responsibilities of statutory authorities, heritage organisations and specialists.

K10 how to develop a personal action plan for learning and self-development with realistic but challenging objectives, expectations and priorities, and how to align this with the interests of the organisation/employer.

K11 techniques for the leadership, management and delivery of projects, including complex projects with many interacting factors. Techniques include budgeting, timetabling and quality assurance, assessment of skillsets and capacity of wider teams. How to review and report on the quality of other's work.

K13 the needs and expectations of a range of customers, colleagues and stakeholders. How to communicate effectively, including management of stakeholders, mediation, public engagement and partnership working.

K14 how to practice in line with current theories and methodologies, and to question and reframe these to develop fresh perspectives and new ways of working to manage complex historic environmental conceptual issues at senior level in a strategic context.

K15 appropriate techniques and materials for the repair of historic buildings and monuments.

K16 professional ethics and codes of conduct involved in the management of projects and the historic environment, including recognising conflicts of interests and appropriate processes for dealing with these.

K17 how to assess sustainability in the historic environment, and the contribution of the historic environment to placemaking, planning and economic development issues.

K18 how to demonstrate critical analysis, interpretation and evaluation of complex historic environmental information, synthesising multi-source data and concepts to make high level recommendations and drive changes in historic environment practice in keeping with organisational and sectoral strategic priorities.

Skills
S5 lead and work as part of a team to manage and deliver projects of all scales and complexities. Be responsible for own work, and where applicable have significant personal accountability for others and/or the allocation of resources, in a wide variety of contexts.
S7 review and report on the quality of other's work constructively and effectively, including technical work, be responsible for quality assurance.
S9 apply policy to decision making, including developing new approaches and policy and best practice guidance. Assess and evidence gaps in knowledge or skills to support heritage protection, management and policy development.
S10 raise awareness, appreciation and understanding of the historic environment, promoting good conservation practice, including through public engagement activities.
S11 contribute to advances in the body of knowledge and historic environment practice, through research, publication, participation in professional and academic networks and events.
S12 supervise, train and develop colleagues, external clients and stakeholders where relevant.
S13 apply relevant sustainability principles to historic environment projects.
S14 present verbal and written arguments clearly and effectively.
S15 manage significant workloads of complex and conflicting data from multiple sources, demonstrating fluency with a wide range of historic environment theory, method and data sources, that can be used to challenge, reformulate and produced clear strategic recommendations and significant changes in historic environment advice.

Behaviours
B2 be capable of conceptual thought, independent decision-making and professional judgement in order to solve problems and tackle complex projects with many interacting factors
B3 commit to quality and their continuous professional development
B4 work effectively individually and as part of a team, including providing strategic leadership. Contributing to, and supporting others to, work and drive change and innovation within the context of organisational, sectoral and wider governmental and commercial strategic priorities relevant to the historic environment.
B5 develop and maintain honest and constructive client and colleague relationships. Be approachable and able to communicate with all levels of their own and other organisations, as well as the general public
B6 be resilient and deal with controversial issues and conflicts of interest, difficult situations and confidential data sensitively. Be sensitive to and aware of the significance of the historic environment, and the needs of its stakeholders, being conscious of integrity, honesty and professional ethical requirements.