

Apprenticeships in

Engineering and Manufacturing

Pearson Level 4 End-point Assessment for
Asset Manager





Pearson Level 4 End-point Assessment for Asset Manager

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1 The Asset Manager Apprenticeship

What are Pearson End-point Assessments?

End-point assessment (EPA) takes place at the end of the apprenticeship programme when the apprentice has passed through gateway and been signed off as ready for the assessment by their employer. It is a synoptic assessment of the knowledge, skills and behaviours outlined in the apprenticeship standard learnt throughout the apprenticeship programme.

Purpose

The purpose of the EPA is to confirm that the apprentice has met the required level of knowledge, skills and behavioural standards set by employers and that they are competent in their role as an Asset Manager.

Asset Managers work in a range of industries that manage physical assets. They may be employed by asset-owning companies, outsourced services companies or asset management consultants. They contribute to the asset management function within an organisation, helping to ensure physical assets are managed in a way to achieve the organisation's objectives and provide an appropriate level of service. This will involve interacting with the wider business. Asset Managers are responsible for ensuring asset management complies with legal frameworks and legislation, including public health, health and safety, economic and environmental.

This apprenticeship standard aligns with the following professional recognition:

- Associate for The Institute of Asset Management.

2 Summary of End-point Assessment

EPA Detail	Pearson Level 4 End-point Assessment for Asset Manager
Qualification number (QN)	610/3915/9
Regulation start date	20/03/2024
First Pearson assessment	21/04/2025
Assessment Methods	<ul style="list-style-type: none"> • Project: Business Case and Evidence, Presentation with Questions • Interview, underpinned by a Portfolio of Evidence <p><i>Refer to Section 5 for detailed information about each assessment method.</i></p>
Grading	Pass/Merit/Distinction <i>Refer to Section 3 for detailed information.</i>
Duration of apprenticeship programme	The typical duration for this apprenticeship is 18 months but this will depend on the individual apprentice's previous experience and access to opportunities to gain the full range of competences.
Gateway requirements	<ul style="list-style-type: none"> • Employer confident that the apprentice is working at or above the occupational standard • Achieved English and mathematics at Level 2, as a minimum. 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. • For the Project: Business Case and Evidence, Presentation with Questions, the Project subject, title and scope must be agreed with Pearson. • For the Interview, apprentices must have compiled and submitted a Portfolio of Evidence.

EPA Detail	Pearson Level 4 End-point Assessment for Asset Manager
Time period for completion of EPA	<p>The EPA will be completed within an EPA period lasting typically for six months, starting when Pearson has confirmed that all gateway requirements have been met.</p> <p>The assessment methods can be delivered in any order.</p>
Apprenticeship certification	<p>The certificate for the apprenticeship is awarded by the Institute for Apprenticeships and Technical Education (IfATE), through a process administered by the Education and Skills Funding Agency (ESFA). As the end-point assessment organisation (EPAO), Pearson will claim certificates on behalf of apprentices.</p>
Digital badging	<p>On successful completion of their EPA, apprentices are issued a securely verified Credly digital credential or 'badge.' The digital badge can be easily shared online via social networks allowing them to showCase their talent and grow their presence in a professional community.</p> <p>Further information about Credly digital credentials can be found at www.pearson.com/en-gb.html (Discover Pearson Businesses).</p>

3 EPA structure

Pearson Level 4 End-point Assessment for Asset Manager

The EPA for the Asset Manager apprenticeship consists of the following two assessment methods:

- Project: Business Case and Evidence, Presentation with Questions
- Interview, underpinned by a Portfolio of Evidence.

The table below gives a summary of the structure of the end-point assessment.

End-point assessment methods	Duration	Assessment method grading
Project: Business Case and Evidence, Presentation with Questions	Business Case 120 hours Presentation and Questions 45 mins	Fail/Pass/Distinction
Interview, underpinned by a Portfolio of Evidence	Interview must last for 60 minutes	Fail/Pass/Distinction

The assessment methods can be delivered in any order.

The result of one assessment method does not need to be known before starting the next.

EPA Grading

The grading for this EPA is Pass/Merit/Distinction.

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

Apprentices who fail one or more assessment method will be awarded an overall EPA 'fail'.

In order to gain an overall EPA 'pass', apprentices must achieve a pass in both assessment methods.

In order to achieve an overall EPA 'merit', apprentices must achieve a distinction in one of the assessment methods and a pass in the other assessment method.

In order to achieve an overall EPA 'distinction', apprentices must achieve a distinction in both assessment methods.

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

EPA Assessment Method 1: Project: Business Case and Evidence, Presentation with Questions	EPA Assessment Method 2: Interview, underpinned by a Portfolio of Evidence	End-point assessment grade
Fail	Any grade	Fail
Any grade	Fail	Fail
Pass	Pass	Pass
Pass	Distinction	Merit
Distinction	Pass	Merit
Distinction	Distinction	Distinction

Any grade = fail, pass, or distinction

4 Assessment

Assessment plan

Pearson's approach to assessing this EPA is set by the assessment plan for the apprenticeship standard. This document is available in *Annexe A*.

Language of assessment

Apprentices must use English only during the assessment of this EPA.

An apprentice taking the EPA may be assessed in British Sign Language for the purpose of reasonable adjustment.

Further information on the use of language in assessment is available in our *Use of languages in qualifications policy*, available on our website.

Gateway

Before progressing to the EPA from on-programme, all apprentices must be signed off by their employer, through the 'gateway'. This gateway sign off confirms that apprentices have the level of occupational knowledge, skills and behaviours required to achieve the apprenticeship.

The EPA-specific requirements for gateway are stated in *Section 2: Summary of End-point Assessment* and the Assessment Plan in *Annexe A*.

Employers must complete a *Gateway Declaration Form and Portfolio Authentication Form* (see *EPA Resource Pack*) with the apprentice. The form and the associated gateway Evidence to prove apprentices have met the requirements must be supplied to Pearson before the EPA can take place.

5 End-point Assessment Methods

Assessment Method 1: Project: Business Case and Evidence, Presentation with Questions

Structure

The Project: Business Case and Evidence, Presentation with Questions assesses apprentices' knowledge, skills and behaviours from the apprenticeship standard, in line with the assessment plan requirements. It is assessed by a Pearson independent end-point assessor (IEA).

Project: Business Case and Evidence, Presentation with Questions	
<p>Component 1: Business Case and Evidence</p> <p>Component 2: Evidence with Questions</p>	<p>The Project involves the apprentice completing a significant and defined piece of work that has a real business benefit.</p> <p>The Project must be based on addressing a 'real-life' asset management risk, problem or an issue that needs resolution. The Project should be capable of implementation and should aim to add value to the organisation.</p> <p>At gateway, apprentices submit to a 500-word synopsis and milestone plan. Once this is signed off, they complete their 5000-word Business Case.</p> <p>The Presentation content must be completed after the gateway and submitted by the apprentice with their Business Case and Evidence.</p> <p>The Presentation must focus on their Project and cover the apprentice's recommendations for their business for the management of the asset group or system.</p>
Duration	<p>The typical duration of the Project should be equivalent to 120 hours work; the work does not have to be completed consecutively. The Project must be submitted a maximum of 16 weeks after the gateway.</p> <p>The Evidence with Questions must last for 45 minutes (+10% at the discretion of the IEA; 15 minutes for the evidence and 30 minutes for the questioning).</p>

Project: Business Case and Evidence, Presentation with Questions	
Grading	<p>Fail/Pass/Distinction.</p> <p>The grading criteria for this assessment method can be found in the assessment plan in <i>Annexe A</i>.</p>
Preparation	<p>Employers will ensure apprentices have sufficient time and the necessary resources, within this period to plan and conduct the Project.</p> <p>The Project must be based on addressing a 'real-life' asset management risk, problem or an issue that needs resolution. The Project shall be capable of implementation and should aim to add value to the organisation.</p>
Delivery and conduct	<p>Apprentices have a maximum of 16 weeks to complete the Project: Business Case and Evidence, (starting when their Project outline is signed off after the gateway).</p> <p>The Project outcome must be in the form of a Business Case and Evidence. The Business Case has a maximum word limit of 5,000 words (+/-10%). Supporting Evidence should be included in an appendix.</p> <p>The Presentation with Questions involves the apprentice presenting the to the IEA, followed by questioning. It may be conducted either face-to-face or via online video conferencing.</p> <p>To deliver the Presentation, the apprentice must have access to audio-visual equipment (if required) that facilitates presentations.</p> <p>The Business Case production should take place in the apprentice's workplace or suitable location for example training provider's premises.</p> <p>The Presentation and Questioning is conducted in a suitable, controlled environment. The venue should be a quiet room, free from distraction and external influence.</p>
Assessment	<p>The Project is submitted to the IEA once it is completed. It is assessed by the IEA using the published grading criteria. The IEA will identify questions based on the Project.</p>

Standards Assessed

The Project: Business Case and Evidence, Presentation with Questions assesses the following areas from the Apprenticeship Standard:

Standard area	KSB ref	Apprenticeship standard outcomes
Knowledge	K3	Impact of organisational context on asset management: regulatory frameworks, stakeholders, governance and asset management policy, objectives strategy and plan.
	K5	Asset systems; effect of each asset on the system and impact of external factors.
	K9	Optioneering, cost benefit analysis; asset management multicriteria decision making (cost, risk, performance, sustainability, compliance and intangibles).
	K10	Creative thinking and problem-solving techniques.
	K12	Performance monitoring of asset life cycle activities
	K13	Asset and asset systems; health, condition, and performance assessment methods.
	K14	Project management, resource and time management techniques.
	K16	Risk management and its application to asset management: risk assessment, quantification, mitigation and impact.
	K17	Techniques to assess asset risk; causes and effects: Failure Mode Event/Effects Critically Analysis (FMEA/FMECA), Root cause analysis and Bow Tie analysis.
	K18	Legislation: Health and Safety at Work, Environmental Protection.
	K22	Communication techniques including plain English – verbal, written and presentation.
	K24	Data analysis and interpretation techniques. Data presentation techniques (charts, diagrams and tables).
	K25	Information technology (IT) systems and processes asset registers, work management systems, word processing, spreadsheets, email, presentation.
K26	Information and data security/management requirements; cyber security, General Data Protection Regulations (GDPR), data protection and integrity.	

Standard area	KSB ref	Apprenticeship standard outcomes
Skills	S1	Identify the organisation's context and constraints that affect asset management.
	S3	Estimate and calculate Life Cycle Cost (LCC) or Total Cost of Ownership (TCO) for assets/asset systems.
	S4	Use techniques to identify interventions for assets/asset system and estimate benefits.
	S5	Apply multi criteria decision making methods to proposed intervention options.
	S6	Select and use decision support tools to make asset management recommendations.
	S7	Develop asset life-cycle plans including performance monitoring and business case.
	S9	Plan and manage projects.
	S10	Assess asset health, condition, and performance.
	S13	Assess and quantify asset, asset system and asset management activity-related risks; identify mitigation options.
	S14	Comply with legislation, asset management standards and company policies.
	S15	Use information technology systems and processes: for example, asset registers, work management systems, word processing, spreadsheets, email, presentation.
	S16	Collate and analyse asset/asset system data and information.
	S17	Interpret and present data - qualitative and/or quantitative.
S18	Communicate with colleagues and stakeholders – verbal, written and evidence.	

Standard area	KSB ref	Apprenticeship standard outcomes
Behaviours	B1	Committed to compliance with legislation, asset management standards and company policies.
	B2	Focusses on value and outcomes in alignment with organisational objectives and stakeholders' expectations.
	B6	Reliable and self-motivated, takes responsibility for work and seeks to deliver against personal objectives.

Assessment Method 2: Interview, underpinned by a Portfolio of Evidence

Structure

The Interview, underpinned by a Portfolio of Evidence, assesses apprentices' knowledge, skills and behaviours from the apprenticeship standard, in line with the assessment plan requirements. It is assessed by a Pearson independent end-point assessor (IEA).

Interview, underpinned by a Portfolio of Evidence	
Summary	<p>The Interview underpinned by a Portfolio of Evidence is a planned, structured discussion between the apprentice and the IEA. It is designed to draw out the best of the apprentice's competence and excellence to cover the mapped KSBs.</p> <p>The Interview is underpinned by a Portfolio of Evidence. Apprentices prepare the Portfolio of Evidence during the on-programme part of their apprenticeship. The portfolio is not directly assessed, it supports the discussion.</p>
Duration	60 minutes
Portfolio	Apprentices are required to provide work-based evidence in a Portfolio to validate and support their responses in the Interview. This Portfolio is submitted prior to the Interview.
Grading	<p>Fail/Pass/Distinction</p> <p>The grading criteria for this assessment method can be found in the assessment plan in <i>Annexe A</i>.</p>
Delivery and conduct	<p>The Interview underpinned by a Portfolio of Evidence will be conducted face to face or remotely.</p> <p>The Interview will have a minimum of 10 questions. Questions will be open and may be designed to seek evidence in relation to one or more topics.</p> <p>Apprentices can refer to and illustrate their answers with evidence from their Portfolio of Evidence.</p> <p>The Interview should take place in a quiet room, free from distractions and influence.</p>
Assessment	The IEA will review the apprentice's responses against the Pass and Distinction grade criteria.

Standards Assessed

The Interview assesses the following areas from the Apprenticeship Standard.

Standard area	KSB ref	Apprenticeship standard outcomes
Knowledge	K1	Asset management standards: ISO55000, British Standard Institute (BSI) Publicly Available Specification (PAS) 55.
	K2	Management systems for asset management: policy, strategy, objectives, plans and continual improvement.
	K4	Different types of assets and classification approaches; hierarchy, function and value.
	K6	Asset/system service and performance requirements; service level.
	K7	Continuous improvement techniques.
	K8	Asset costing and valuation techniques; cost estimation (maintenance, operation, renewal), depreciation, whole life costing, and social, environmental, safety and reputational cost.
	K11	Asset life cycle activities: demand analysis and future requirements, creation and acquisition or rationalisation, operation, resilience, redundancy, shutdown, obsolescence, outage management, future asset capability.
	K15	Types of asset maintenance: preventive, predictive, corrective.
	K19	Sustainable development; impact on environment of asset management and asset management activities.
	K20	Supply chain; types of suppliers, their role, and contractual relationships.
	K21	Collaborative working techniques: personality types, influencing, negotiating, networking, and equality, diversity and inclusion.
K23	Business ethics including corporate governance, bribery, discrimination, socially responsible organisations.	

Standard area	KSB ref	Apprenticeship standard outcomes
Skills	S2	Identify asset service and performance requirements.
	S8	Classify assets, asset systems, life cycle stages and activities.
	S11	Select and apply fault finding technique(s) to identify causes and effects of assets/asset system failures.
	S12	Apply continuous improvement techniques.

Standard area	KSB ref	Apprenticeship standard outcomes
Behaviours	B3	Collaborates, within teams and across disciplines.
	B4	Shares knowledge and good practice, gives and receives feedback, provides help and support.
	B5	Adaptable for example, seeks new ways of doing things.
	B7	Committed to continued professional development.

6 Delivery of End-point Assessment

End-point assessment planning and scheduling

Employers and/or training providers must have an agreement in place to conduct EPAs with Pearson, and apprentices must be registered on the ACE360 system. Once the gateway Evidence has been uploaded to ACE360, this will alert the IEA to review the Evidence and start the planning and scheduling process.

The purpose of the EPA planning meeting is to share information with the IEA in order to support the assessment process and to agree a plan for the upcoming assessment activities for the apprentices. The IEA will agree a plan and schedule for each assessment activity. The end-point assessment planning meeting can be conducted remotely using appropriate technology.

All assessment methods must be completed within the time period specified in *Section 2: Summary of End-point Assessment*.

Reassessment

Reassessment, including both resit and retake, is permitted in agreement between Pearson and the employer. The timescale will be agreed on a Case-by-Case basis with Pearson. As part of that agreement, any reassessments must not provide an apprentice with an unfair advantage over others.

For additional EPA-specific requirements, refer to the assessment plan in *Annexe B*.

Booking reassessment

Reassessment is requested using the ACE360 system. Once the request is confirmed, the allocated IEA will liaise with the key contact to start the scheduling process.

Appeals

The *End-point assessment enquiries and appeals policy* is available on the Pearson website and ACE Knowledge base. This has full information about what will happen if an apprentice or centre wishes to query the result of an assessment.

7 Access to assessment

Access to assessment for apprentices with disabilities or specific needs

Equality and fairness are central to our work. Our *Equity, diversity and inclusion in Pearson qualifications and related services policy* requires all apprentices to have equal opportunity to access our assessments, and that our EPAs are awarded in a way that is fair to every apprentice.

We are committed to making sure that:

- apprentices with a protected characteristic (as defined by the Equality Act 2010) are not, when they are taking one of our assessments, disadvantaged in comparison to apprentices who do not share that characteristic
- all apprentices achieve the recognition they deserve from their EPA and that this achievement can be compared fairly to the achievement of their peers.

For apprentices with disabilities and specific needs, the assessment of their potential to achieve the EPA must identify, where appropriate, the support that will be made available to them during delivery and assessment.

Centres must deliver the EPA in accordance with current equality legislation. For full details of the Equality Act 2010, please [visit www.legislation.gov.uk](http://www.legislation.gov.uk)

Reasonable adjustments

A reasonable adjustment relates to an adjustment that helps to reduce the effect of a disability or a physical or mental health condition, which may place the apprentice at a disadvantage compared to others. If an apprentice requires any adjustment to their assessment then this must be recorded within the ACE360 system to support the discussion at the EPA planning meeting.

Pearson will apply the *Reasonable adjustment matrix* published by the Institute for Apprenticeships and Technical Education (IfATE).

Further guidance: [Submitting Reasonable Adjustments Requests](#)

8 Malpractice

Dealing with malpractice in assessment

'Malpractice' refers to acts that undermine the integrity and validity of assessment, the certification of qualifications and/or may damage the authority of those responsible for delivering the assessment and certification.

Pearson does not tolerate actual or attempted malpractice by apprentices, centre staff or centres in connection with Pearson qualifications. Pearson may impose sanctions on apprentices, centre staff or centres where malpractice or attempted malpractice has been proven.

AI misuse is deemed by Pearson and the other JCO awarding organisations to be a form of plagiarism. AI misuse can involve plagiarising content produced by AI tools and/or incomplete or poor acknowledgement of AI use. More information can be found in the JCO AI Use in Assessments guidance here: *AI Use in Assessments: Protecting the Integrity of Qualifications* – JCO Joint Council for Qualification

Malpractice may occur or be suspected in relation to any unit or type of assessment within a qualification. For further details on malpractice and advice on preventing malpractice by apprentices, please see Pearson's *Centre Guidance: Dealing with Malpractice*, available on our website.

Centres are required to take steps to prevent malpractice and to assist with investigating instances of suspected malpractice. Apprentices must be given information that explains what malpractice is and how suspected incidents will be dealt with by the centre. The *Centre Guidance: Dealing with Malpractice* document gives full information on the actions we expect you to take.

Pearson may conduct investigations if we believe a centre is failing to conduct assessments according to our policies. The above document gives further information, examples, and details the sanctions that may be imposed.

In the interests of apprentices and centre staff, centres need to respond effectively and openly to all requests relating to an investigation into an incident of suspected malpractice.

Apprentice malpractice

The head of centre is required to report incidents of suspected apprentice malpractice that occur during the delivery of Pearson qualifications. We ask centres to complete JCO Form M1 (www.jcq.org.uk/malpractice) and email it with any supporting documents (signed statements from the apprentice, invigilator, copies of evidence, etc) to the Investigations Processing team at candidatemalpractice@pearson.com. The responsibility for determining any appropriate sanctions on apprentices lies with Pearson.

Apprentices must be informed at the earliest opportunity of the specific allegation and the centre's malpractice policy, including the right of appeal. Apprentices found guilty of malpractice may be disqualified from the qualification for which they have been entered with Pearson.

Failure to report malpractice constitutes staff or centre malpractice.

Tutor/centre malpractice

The head of centre is required to inform Pearson's Investigations team of any incident of suspected malpractice (which includes maladministration) by centre staff, before any investigation is undertaken. The head of centre should inform the Investigations team by submitting a JCQ M2 Form (downloadable from www.jcq.org.uk/malpractice) with supporting documentation to pqsmalpractice@pearson.com. Where Pearson receives allegations of malpractice from other sources (for example Pearson staff, anonymous informants), the Investigations team will conduct the investigation directly or may ask the head of centre to assist.

Pearson reserves the right in cases of suspected malpractice to withhold the issuing of results/certificates while an investigation is in progress. Depending on the outcome of the investigation, results and/or certificates may not be released or they may be withheld.

You should be aware that Pearson may need to suspend certification when undertaking investigations, audits and quality assurances processes. You will be notified within a reasonable period of time if this occurs.

Sanctions and appeals

Where malpractice is proven, we may impose sanctions such as:

- mark reduction for affected assessments
- disqualification from the qualification
- debarment from registration for Pearson qualifications for a period of time.

If we are concerned about your centre's quality procedures we may impose sanctions such as:

- requiring centres to create an improvement action plan
- requiring staff members to receive further training
- placing temporary suspensions on certification of learners
- placing temporary suspensions on registration of learners
- debarring staff members or the centre from delivering Pearson qualifications
- suspending or withdrawing centre approval status.

The centre will be notified if any of these apply.

Pearson has established procedures for considering appeals against sanctions arising from malpractice. Appeals against a decision made by Pearson will normally be accepted only from the head of centre (on behalf of apprentices and/or members or staff) and from individual members (in respect of a decision taken against them personally). Further information on appeals can be found in the JCQ Appeals booklet (<https://www.jcq.org.uk/exams-office/appeals>).

9 Further information

Edexcel, BTEC and Pearson Work Based Learning contact details:

- <https://qualifications.pearson.com/en/contact-us.html>

Books, software and online resources for UK schools and colleges:

- www.pearsonschoolsandcolleges.co.uk

Document that further supports the information in this specification:

- *EPA Service Guide* (Pearson, this is made available to approved centres).

10 Glossary

Term	Description
Apprenticeship Standard	A short document prepared by a Trailblazer group that sets out concisely the requirements to be competent in a job role. All apprenticeship standards are published on www.gov.uk .
Assessment Plan	This document is also prepared by a Trailblazer group and sets out the requirements that end-point assessment organisations must follow when assessing the EPA.
Competence	The minimum knowledge, skills and behaviours (KSBs) required to perform a job role effectively.
Assessment Methods	The different assessments that form the overarching EPA. Most EPAs will typically have between two and four assessment methods that assess set parts of the overarching standard.
End-point Assessment	A synoptic assessment of the knowledge, skills and behaviours outlined in the apprenticeship standard that have been learned throughout the apprenticeship programme. The apprentice has to pass the EPA to be successful in their apprenticeship programme and demonstrate competence.
End-point Assessment Organisation (EPAO)	Approved to deliver EPA. Employers select an approved EPAO from the Education & Skills Funding Agency's Apprenticeship Provider and Assessment Register (APAR).
Gateway	The point at which the apprentice is identified as being competent by their employer and therefore ready to plan to take their end-point assessment. There are requirements for maths and English to enter gateway and there may be other requirements, such as mandatory qualifications, that vary depending on the apprenticeship standard.
Independent End-point Assessor	The assessor appointed by Pearson to work with the apprentice and employer to plan their EPA during gateway and then assess the apprentice in the final EPA.
On-programme	The first and main part of the apprenticeship when the apprentice is developing their KSBs towards competence. All apprentices must spend at least 20% of their on-programme time completing off-the-job training.

Term	Description
Resit	Occurs when an apprentice feels comfortable to attempt their EPA again, with no additional training or learning, e.g. failing an assessment method on one or two criteria, due to test nerves
Retake	Occurs when an apprentice needs a period of additional training or learning to support them to reattempt their EPA, e.g. failing an assessment method on multiple criteria, due to lack of preparation or not being able to articulate their response in line with the criteria
Trailblazer group	A group of employers who have worked together to agree the apprenticeship standard and write the associated assessment plan.
Institute for Apprenticeships and Technical Education (IfATE)	IfATE is a non-departmental public body that oversees the development, approval and publication of apprenticeship standards and assessment plans. In addition, the institute is responsible for technical education, including T Levels.

Annexe A: Assessment Plan

End-point assessment plan for asset manager apprenticeship standard

Apprenticeship standard number	Apprenticeship standard level	Integrated end-point assessment
ST0861	4	No

Introduction and overview

This document sets out the requirements for end-point assessment (EPA) for the asset manager apprenticeship standard. It explains how EPA for this apprenticeship must operate.

It provides the EPA design requirements for end-point assessment organisations (EPAOs) for this apprenticeship standard. It will also be useful for apprentices undertaking this apprenticeship, their employers and training providers.

EPA must be conducted by an EPAO approved to deliver EPA for this apprenticeship standard. Each employer should select an approved EPAO from the Education & Skills Funding Agency's Register of end-point assessment organisations (RoEPAO).

Full-time apprentices will typically spend 18 months on-programme (before the gateway) working towards this occupational standard. All apprentices must spend a minimum of 12 months on-programme. All apprentices must spend a minimum of 20% of on-programme time undertaking off-the-job training.

Before starting EPA, an apprentice must meet the gateway requirements. For this apprenticeship they are:

- the employer must be content that the apprentice is working at or above the occupational standard
- apprentices must have achieved English and mathematics at Level 2¹
- apprentices must have agreed the subject, title and scope for their EPA project with their EPAO
- apprentices must have compiled and submitted a portfolio of evidence to underpin the EPA interview

The EPAO must confirm that all required gateway evidence has been provided and accepted as meeting the gateway requirements. The EPAO is responsible for confirming gateway eligibility. Once this has been confirmed, the EPA period starts. This EPA should then be completed within an EPA period lasting typically for six months.

This EPA consists of two discrete assessment methods.

¹ 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. British Sign Language (BSL) qualifications are an alternative to English qualifications for those who have BSL as their primary language.

It will be possible to achieve the following grades in each end-point assessment method:

Assessment method 1: Project: business case and evidence, presentation with questions

- fail
- pass
- distinction

Assessment method 2: Interview, underpinned by a portfolio of evidence

- fail
- pass
- distinction

Performance in these assessment methods will determine the overall apprenticeship standard grade of:

- fail
- pass
- merit
- distinction

EPA summary table

<p>On-programme (typically 18 months)</p>	<p>Training to develop the knowledge, skills and behaviours (KSBs) of the occupational standard.</p> <p>Training towards English and mathematics Level 2¹, if required.</p> <p>Compiling a portfolio of evidence to underpin the interview.</p>
<p>End-point assessment gateway</p>	<p>The employer must be content that the apprentice is working at or above the level of the occupational standard.</p> <p>Achieved English and mathematics at Level 2¹, as a minimum.</p> <p>For the project: business case and evidence, presentation with questions, the project subject, title and scope must be agreed with the EPAO.</p> <p>For the interview, apprentices must have compiled and submitted a portfolio of evidence.</p>
<p>End-point assessment (typically 6 months)</p>	<p>Grades available for each assessment method</p> <p>End-point assessment method 1: Project: business case and evidence, presentation with questions:</p> <ul style="list-style-type: none"> · fail · pass · distinction <p>End-point assessment method 2: Interview, underpinned by a portfolio of evidence:</p> <ul style="list-style-type: none"> · fail · pass · distinction <p>Overall EPA and apprenticeship can be graded:</p> <ul style="list-style-type: none"> · fail · pass · merit · distinction
<p>Professional recognition</p>	<p>This apprenticeships standard has professional recognition.</p> <p>The Institute of Asset Management (IAM):</p> <ul style="list-style-type: none"> · Associate level

Length of end-point assessment period

The EPA will be completed within an EPA period lasting typically for six months, starting when the EPAO has confirmed that all gateway requirements have been met.

Order of end-point assessment methods

The assessment methods can be delivered in any order.

The result of one assessment method does not need to be known before starting the next.

EPA gateway

The apprentice should only enter the gateway once the employer is content that the apprentice is working at or above the level of the occupational standard. 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.

The EPAO determines when all other gateway requirements have been met, and the EPA period will only start once the EPAO has confirmed this.

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

- achieved 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. British Sign Language (BSL) qualifications are an alternative to English qualifications for those who have BSL as their primary language.
- for the project: business case and evidence, presentation with questions, the apprentice must have the subject, title and scope agreed by their EPAO. Apprentices must provide:
 - a detailed milestone delivery plan, no longer than 16 weeks
 - 500-word synopsis of their planned project
- for the interview, the apprentice must have compiled and submitted a portfolio of evidence – see requirements below

· **Portfolio of evidence requirements:**

- apprentices must compile a portfolio of evidence during the on-programme period of the apprenticeship
- it must contain evidence related to the KSBs that will be assessed by the interview
- the portfolio of evidence will typically contain 10 discrete pieces of evidence
- evidence must be mapped against the KSBs assessed by the interview
- evidence may be used to demonstrate more than one KSB; a qualitative as opposed to quantitative approach is suggested
- evidence sources may include:
 - workplace documentation/records, for example workplace policies/procedures, records
 - witness statements
 - annotated photographs
 - video clips (maximum total duration 10 minutes); the apprentice must be in view and identifiable

This is not a definitive list; other evidence sources are possible.
- it should not include reflective accounts or any methods of self-assessment
- any employer contributions should focus on direct observation of performance (for example witness statements) rather than opinions
- the evidence provided must be valid and attributable to the apprentice; the portfolio of evidence must contain a statement from the employer and apprentice confirming this
- the portfolio of evidence must be submitted to the EPAO at the gateway

The portfolio of evidence is not directly assessed. It underpins the interview and therefore should not be marked by the EPAO. EPAOs should review the portfolio of evidence in preparation for the interview but are not required to provide feedback after this review of the portfolio.

End-point assessment methods

The apprentice will be assessed against the KSBs assigned to the assessment methods outlined below, as shown in the mapping section of this EPA plan.

End-point assessment method 1: Project: business case and evidence, presentation with questions

Overview

This assessment method has two components:

1. business case and evidence
2. presentation with questions

A project involves the apprentice completing a significant and defined piece of work that has a real business benefit. The project must be undertaken after the apprentice has gone through the gateway.

The 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 assessed 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), as shown in the mapping of assessment methods. The EPAO must refer to the grading descriptors to ensure that projects are pitched appropriately.

The independent assessor will assess the components of this assessment method holistically. The independent assessor will make all grading decisions.

The rationale for this assessment method is:

- it assesses the apprentice undertaking key activities of an asset manager, in normal working conditions, which will allow them to perform at their best
- it allows for a wide range of asset manager work to be demonstrated
- it provides a cost-effective assessment, as it minimises independent assessor time and makes use of the apprentice's employer's workplace, equipment, and resources, and should contribute to workplace production
- it is holistic

Project

The project must be based on addressing a 'real-life' asset management risk, problem or an issue that needs resolution. The project shall be capable of implementation and should aim to add value to the organisation.

The EPAO must sign off the project's subject, title and scope to confirm its suitability at gateway.

The project starts after the apprentice has gone through the gateway. The typical duration of the project should be equivalent to 120 hours work; the work does not have to be completed consecutively. The project must be submitted 16 weeks after the gateway.

The employer should ensure the apprentice has sufficient time and the necessary resources, within this period, to plan and undertake the project.

Whilst completing the project, the apprentice should be subject to the workplace's normal supervision arrangements.

The following activities should be undertaken as part of the project:

- ensures stakeholder requirements are taken into account
- consideration of assets within the system
- cost and benefit analysis, and options appraisal
- historical and future asset performance
- risk analysis, quantification, and management
- multi-criteria decision making
- detailed data collection and analysis

The project may relate to an asset class across a portfolio or a segment of assets by functional system.

Component 1. Business case and evidence

Delivery

The project outcome should be in the form of a business case and evidence.

The business case should include:

- an executive summary
- the outcomes of the project – recommendations and conclusions
- the benefits
- the barriers overcome
- the actions undertaken including the project timeline
- the stakeholder support and other resources required
- the long-term measures of success
- an appendix containing supporting evidence – see requirements below

Evidence should include:

- literature searches
- other evidence relating directly to the project, such as drawings, spreadsheets, financial reports, data reports, quality/compliance records, pictures, or links to video clips. This is not a definitive list, other evidence sources are possible

Evidence requirements:

- only evidence directly related to the project can be included
- video clips must be combined maximum total duration of 10 minutes
- the evidence provided must be valid and attributable to the apprentice

The business case has a maximum word limit of 5,000 words. A tolerance of plus or minus 10% is allowed at the apprentice's discretion. Evidence, references, and diagrams will not be included in this total. The business case must map, in an appendix, how the business case and evidence demonstrate the KSBs mapped to this assessment method. It is expected that some evidence may cover multiple KSBs.

The apprentice will conduct their project and submit the business case and supporting evidence to the EPAO after a maximum of 16 weeks from the gateway. The business case and evidence can be submitted in paper form or electronically. The presentation materials should also be submitted at the same time as the business case and evidence.

When the business case and evidence is submitted, the employer and the apprentice should provide a statement to verify the submitted work is that of the apprentice.

Project location

The business case production should take place in the apprentice's workplace or suitable location for example training provider's premises.

Component 2. Presentation with questions

Delivery

A presentation with questions involves an apprentice presenting to an independent assessor, followed by questioning from the independent assessor. It may be conducted either face-to-face or via online video conferencing. The presentation with questions must last for 45 minutes (15 minutes for the presentation and 30 minutes for the questioning) +10% at the independent assessor's discretion.

The presentation content must be completed after the gateway and submitted by the apprentice with their business case and evidence.

The presentation must focus on their project and cover the apprentice's recommendations for their business for the management of the asset group or system.

The purpose of the questioning is:

- to verify that the project is the apprentice's own work
- to seek clarification on the business case and evidence
- to assess the depth and breadth of knowledge, skills and behaviours
- to assess those KSBs that the apprentice did not have the opportunity to demonstrate during the project, although these should be kept to a minimum

The presentation will last for 15 minutes.

Apprentices must be given at least two-weeks' notice of the date and time of the presentation. The independent assessor will have a minimum of two weeks to review the business case, evidence and presentation prior to the presentation date.

To deliver the presentation, the apprentice must have access to audio-visual equipment (if required) that facilitates presentations. The apprentice needs to notify the EPAO at the submission of the presentation of any technical requirements for the presentation component.

The apprentice must be given the opportunity to prepare themselves prior to the start of the presentation (uploading presentation, etc), before the assessment starts.

Questions must be asked. The purpose of questioning is to assess the apprentice's level of competence against the grading descriptors. Those KSBs that the apprentice did not have the opportunity to demonstrate during the business case and supporting evidence can instead be covered by questioning, although these should be kept to a minimum.

The duration should be fixed at 30 minutes for the questioning +10% at the independent assessor's discretion. The independent assessor must use the full time available for questioning to allow the apprentice the opportunity to evidence occupational competence at the highest level available, unless the apprentice has already achieved the highest grade available.

The independent assessor must ask a minimum of four questions at the end of the presentation. They may ask follow-up questions where clarification is required.

Independent assessors must use their EPAO's question bank as a source for questioning and are expected to use their professional judgment to tailor those questions appropriately.

Independent assessors are responsible for generating suitable follow-up questions in line with the EPAOs training and standardisation process.

KSBs met and answers to questions, must be recorded by the independent assessor. The independent assessor will make all grading decisions.

The project must be subject to the EPAO's moderation processes; therefore, a moderator may be present during the presentation with questions.

Assessment location

EPAOs must ensure that the presentation and questioning elements are conducted in a suitable, controlled environment. The venue should be a quiet room, free from distraction and external influence.

The presentation with questions may take place in:

- employer's premises
- a suitable venue selected by the EPAO, such as the training provider's premises
- through a secure on-line video conference facility

Specific venue requirements that must be in place: audio-visual equipment (if required) that facilitates presentations.

Video conferencing can also be used to conduct the presentation but the EPAO must have processes in place to verify the identity of the apprentice and ensure the apprentice is not being aided.

Question and resource development

EPAOs will create and set open questions to assess KSBs mapped to this assessment method. Each EPAO must develop 'question banks' of sufficient size to prevent predictability and review them regularly (and at least once a year) to ensure the questions they contain are fit for purpose. Independent assessors must use the question bank as a source for questioning and are expected to use their professional judgment to tailor those questions appropriately.

Independent assessors are responsible for generating suitable follow-up questions in line with the EPAO's training and standardisation process. The questions relating to 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.

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

- Independent assessor assessment materials which include:
 - Training materials
 - Administration materials
 - Moderation and standardisation materials
 - Guidance materials
 - Grading guidance
- Question bank
- Guidance documentation for the apprentice and employer

End-point assessment method 2: Interview, underpinned by a portfolio of evidence

Overview

This assessment method has one component.

An interview consists of an independent assessor asking an apprentice a series of questions to assess their competence against the KSBs. The independent assessor leads this process to obtain information from the apprentice to enable structured assessment decision-making to occur.

The rationale for this assessment method is:

- allows for assessment of KSBs that do not occur on predictable or regular basis and may not naturally be assessed as part of the project
- it allows for testing of responses where there are a range of potential answers depending on the context of the apprentice's workplace
- it is a cost effective, as apart from a venue it does not require additional resources

Delivery

The independent assessors will conduct and assess the interview.

The interview must last for 60 minutes. The independent assessor has the discretion to increase the time of the interview by up to 10% to allow the apprentice to complete their last answer.

The interview will have a minimum of 10 questions. During this method, the independent assessor must combine questions from the EPAO's question bank and those generated by themselves.

The purpose of the questions will be to assess the following topics:

- asset management concepts and systems
- asset management decision making
- asset management life cycle activities
- risk management
- resource management and collaboration

The interview will be conducted as follows.

EPAOs must make arrangements for the interview with the apprentice's employer.

Apprentices must be given at least two-weeks' notice of the date and time of the interview.

Questions should be open. Additional follow up questions are allowed, to seek clarification and to make a judgement against the grading descriptors.

Questions may be designed to seek evidence in relation to one or more topics.

The independent assessor should adapt their questions to the apprentice's individual circumstances following a review of their portfolio of evidence. The independent assessor should have a minimum of five working days to review the portfolio of evidence.

Apprentices must have access to their portfolio of evidence during the interview.

Apprentices can refer to and illustrate their answers with evidence from their portfolio of evidence, however the portfolio of evidence is not directly assessed.

Apprentices are expected to understand and use relevant occupational language that would be typical of a competent person in this occupation.

Evidence from the interview, underpinned by a portfolio of evidence, must be assessed using the grading criteria for this assessment method.

The interview must be subject to the EPAO's moderation processes; therefore, a moderator may be present during the interview.

KSBs met and answers to questions, must be recorded by the independent assessor. The independent assessor will make all grading decisions.

Assessment location

The interview should take place in a quiet room, free from distractions and influence. Video conferencing can also be used to conduct the interview but the EPAO must have processes in place to verify the identity of the apprentice and ensure the apprentice is not being aided.

The interview can take place in any of the following:

- employer's premises
- a suitable venue selected by the EPAO, such as the training providers premises

Question and resource development

A 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. Independent assessors must use the question bank as a source for questions and are expected to use their professional judgment to tailor those questions appropriately. Independent assessors are responsible for asking suitable questions in line with the EPAO's training and standardisation process.

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

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

- assessment specifications
- grading guidance
- question bank (for independent assessors only, not for wider distribution)
- assessment recording documentation
- guidance document for employers and apprentices on the process / timescales for the assessment as well as a description of the purpose
- guidance document for independent assessors on how to carry out the assessment

Overall EPA grading

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

Performance in the EPA will determine the apprenticeship grade of fail, pass, merit or distinction.

Independent assessors must individually grade each assessment method, according to the requirements set out in this plan.

EPAOs must combine the individual assessment method grades to determine the overall EPA grade.

Apprentices who fail one or more assessment method will be awarded an overall EPA 'fail'.

In order to gain an overall EPA 'pass', apprentices must achieve a pass in both assessment methods.

In order to achieve an overall EPA 'merit', apprentices must achieve a distinction in one of the assessment methods and a pass in the other assessment method.

In order to achieve an overall EPA 'distinction', apprentices must achieve a distinction in both assessment methods.

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 – Project: business case and evidence, presentation with questions	Assessment method 2 – Interview, underpinned by a portfolio of evidence	Overall grading
Fail	Any grade	Fail
Any grade	Fail	Fail
Pass	Pass	Pass
Pass	Distinction	Merit
Distinction	Pass	Merit
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 at the employer's discretion. The apprentice's employer will need to agree that either a re-sit or re-take is an appropriate course of action.

A re-sit does not require further learning, whereas a re-take does.

Apprentices should have a supportive action plan to prepare for a re-sit or a re-take.

An apprentice who fails one or more assessment method, and therefore the EPA in the first instance, will be required to re-sit or re-take.

If the apprentice fails the project assessment method, they may amend the business case and presentation in line with the independent assessor's feedback, rather than complete a new project.

The timescale for a re-sit/re-take is agreed between the employer and EPAO. A re-sit is typically taken within two months of the EPA outcome notification. The timescale for a re-take is dependent on how much re-training is required and is typically taken within four months of the EPA outcome notification.

All assessment methods must be taken within a six-month period, otherwise the entire EPA will need to be re-sat/re-taken.

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

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.

Roles and responsibilities

Role	Responsibility
Apprentice	<p>As a minimum, apprentices should:</p> <ul style="list-style-type: none"> · participate in and complete on-programme training to meet the KSBs as outlined in the occupational standard for a minimum of 12 months · undertake 20% off-the-job training as arranged by the employer and training provider · understand the purpose and importance of EPA · undertake the EPA including meeting all gateway requirements
Employer	<p>As a minimum, employers should:</p> <ul style="list-style-type: none"> · work with the training provider (where applicable) to support the apprentice in the workplace to provide the opportunities to develop the KSBs · arrange and support a minimum of 20% off-the-job training to be undertaken by the apprentice · decide when the apprentice is working at or above the occupational standard and so is ready for EPA · select the EPAO · ensure that all supporting evidence required at the gateway is submitted in accordance with this EPA plan · remain independent from the delivery of the EPA · confirm arrangements with the EPAO for the EPA (who, when, where) in a timely manner (including providing access to any employer specific documentations as required, for example company policies) · ensure that the EPA is scheduled with the EPAO for a date and time which allow appropriate opportunity for the KSBs to be met · ensure the apprentice is well prepared for the EPA · ensure the apprentice is given sufficient time away from regular duties to prepare for and complete any post-gateway elements of the EPA, and that any required supervision during this time (as stated within this EPA plan) is in place · where the apprentice is assessed in the workplace, ensure that the apprentice has access to the resources used on a daily basis

EPAO	<p>As a minimum, EPAOs should:</p> <ul style="list-style-type: none"> • agree the EPA price • understand the occupational standard • appoint administrators (and invigilators where required) to administer the EPA as appropriate • provide training for independent assessors in terms of good assessment practice, operating the assessment tools and grading • provide adequate information, advice and guidance documentation to enable apprentices, employers and training providers to prepare for the EPA • arrange for the EPA to take place, in consultation with the employer • deliver the EPA as outlined in this EPA plan in a timely manner • where the apprentice is not assessed in the workplace, ensure that the apprentice has access to required resources and liaise with the employer to agree this if necessary • use appropriate assessment recording documentation to ensure a clear and auditable process is in place for providing assessment decisions and feedback to all relevant stakeholders • have no direct connection with the apprentice, their employer or training provider. In all instances including when the EPAO is the training provider (i.e. HEI) there must be no conflict of interest • have policies and procedures for internal quality assurance (IQA), and maintain records of regular and robust IQA activity and moderation for external quality assurance (EQA) purposes • conform to the requirements of the nominated external quality assurance provider (EQAP) • conform to the requirements of the Register of End-Point Assessment Organisations (RoEPAO) • deliver induction training for independent assessors, and for invigilators and markers where used • undertake standardisation activity on this apprenticeship standard for all independent assessors before they conduct an EPA for the first time, if the EPA is updated and periodically as appropriate (a minimum of annually) • manage invigilation of apprentices in order to maintain security of the assessment in line with their malpractice policy • verify the identity of the apprentice being assessed • use language in the development and delivery of the EPA that is appropriate to the level of the occupational standard • request certification via the Apprenticeship Service upon successful achievement of the EPA
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<p>Independent assessor</p>	<p>As a minimum, an independent assessor should:</p> <ul style="list-style-type: none"> • have the competence to assess the apprentice at this level and hold any required qualifications and experience in line with the requirements of the independent assessor as detailed in the IQA section of this EPA plan • understand the occupational standard and the requirements of this EPA • have, maintain and be able to evidence up to date knowledge and expertise of the subject matter • deliver the end-point assessment in-line with the EPA plan • comply with the IQA requirements of the EPAO • have no direct connection or conflict of interest with the apprentice, their employer or training provider; in all instances including when the EPAO is the training provider (i.e. HEI) • attend induction training • attend standardisation events when they begin working for the EPAO, before they conduct an EPA for the first time and a minimum of annually on this apprenticeship standard • assess each assessment method, as determined by the EPA plan, and without extending the EPA unnecessarily • assess against the KSBs assigned to each assessment method, as shown in the mapping of assessment methods and as determined by the EPAO, and without extending the EPA unnecessarily • make all grading decisions • record and report all assessment outcome decisions, for each apprentice, following instructions and assessment recording documentation provided by the EPAO in a timely manner • use language in the development and delivery of the EPA that is appropriate to the level of the occupational standard
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<p>Training provider</p>	<p>As a minimum, the training provider should:</p> <ul style="list-style-type: none"> • work with the employer and support the apprentice during the off-the-job training to provide the opportunities to develop the knowledge, skills and behaviours as listed in the occupational standard • conduct training covering any knowledge, skill or behaviour requirement agreed as part of the Commitment Statement (often known as the Individual Learning Plan) • monitor apprentices progress during any training provider led on-programme learning • advise the employer, upon request, on the apprentice's readiness for EPA <p>remain independent from delivery of the EPA. Where the training provider is the EPA (i.e. HEI) there must be procedures in place to mitigate against any conflict of interest.</p>
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Reasonable adjustments

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

Internal Quality Assurance (IQA)

Internal quality assurance refers to the strategies, policies and procedures that EPA organisations must have in place to ensure valid, consistent and reliable end-point assessment decisions. EPAOs for this EPA must adhere to all requirements within the Roles and Responsibilities section and:

- have effective and rigorous quality assurance systems and procedures that ensure fair, reliable and consistent assessment across employers, places, times and independent assessors
- appoint independent assessors who are competent to deliver the end-point assessment and who:
 - have recent relevant experience of the occupation/sector to at least the same occupational level of the apprenticeship standard gained in the last three years or significant experience of the occupation/sector
 - relevant professional recognition at a minimum of level 6. For example, Chartered engineer
- operate induction training for independent assessors and any other personnel involved in the delivery and or/assessment of the EPA (e.g. markers and invigilators)
- provide training for independent assessors in terms of good assessment practice, operating the assessment tools and grading
- where appropriate, provide ongoing training for markers and invigilators
- provide standardisation activity for this apprenticeship standard for all independent assessors:
 - before they conduct an EPA for the first time
 - if the EPA is updated
 - periodically as appropriate (a minimum of annually)
- conduct effective moderation of assessment decisions and grades
- conduct appeals where required, according to the EPAO's appeals procedure, reviewing and making final decisions on assessment decisions and grades

Value for money

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

- completing applicable assessment methods online (i.e. computer-based assessment)
- utilising digital remote platforms to conduct applicable assessment methods
- using the employer's premises
- conducting assessment methods on the same day

It is anticipated that the project presentation with questions and interview will be conducted on the same day to reduce costs however, this is not a requirement.

Professional recognition

This apprenticeship standard has professional recognition. The Institute of Asset Management (IAM):

- Associate level

Mapping of knowledge, skills and behaviours (KSBs)

Assessment method 1. Project: business case and evidence, presentation with questions

Knowledge
K3. Impact of organisational context on asset management: regulatory frameworks, stakeholders, governance and asset management policy, objectives strategy and plan.
K5. Asset systems; effect of each asset on the system and impact of external factors.
K9. Optioneering, cost benefit analysis; asset management multicriteria decision making (cost, risk, performance, sustainability, compliance and intangibles).
K10. Creative thinking and problem-solving techniques.
K12. Performance monitoring of asset life cycle activities.
K13. Asset and asset systems; health, condition, and performance assessment methods.
K14. Project management, resource and time management techniques.
K16. Risk management and its application to asset management: risk assessment, quantification, mitigation and impact.
K17. Techniques to assess asset risk; causes and effects: Failure Mode Event/Effects Critically Analysis (FMEA/FMECA), Root cause analysis and Bow Tie analysis.
K18. Legislation: Health and Safety at Work, Environmental Protection.
K22. Communication techniques including plain English – verbal, written and presentation.
K24. Data analysis and interpretation techniques. Data presentation techniques (charts, diagrams and tables).
K25. Information technology (IT) systems and processes asset registers, work management systems, word processing, spreadsheets, email, presentation.
K26. Information and data security/management requirements; cyber security, General Data Protection Regulations (GDPR), data protection and integrity.

Skills
S1. Identify the organisation's context and constraints that affect asset management.
S3. Estimate and calculate Life Cycle Cost (LCC) or Total Cost of Ownership (TCO) for assets/asset systems.
S4. Use techniques to identify interventions for assets/asset system and estimate benefits.
S5. Apply multi criteria decision making methods to proposed intervention options.
S6. Select and use decision support tools to make asset management recommendations.
S7. Develop asset life-cycle plans including performance monitoring and business case.
S9. Plan and manage projects.
S10. Assess asset health, condition, and performance.
S13. Assess and quantify asset, asset system and asset management activity-related risks; identify mitigation options.
S14. Comply with legislation, asset management standards and company policies.
S15. Use information technology systems and processes: for example, asset registers, work management systems, word processing, spreadsheets, email, presentation.
S16. Collate and analyse asset/asset system data and information.
S17. Interpret and present data - qualitative and/or quantitative.
S18. Communicate with colleagues and stakeholders – verbal, written and presentation.

Behaviours
B1. Committed to compliance with legislation, asset management standards and company policies.
B2. Focusses on value and outcomes in alignment with organisational objectives and stakeholders' expectations.
B6. Reliable and self-motivated, takes responsibility for work and seeks to deliver against personal objectives.

Assessment method 2. Interview, underpinned by a portfolio of evidence

Knowledge
K1. Asset management standards: ISO55000, British Standard Institute (BSI) Publicly Available Specification (PAS) 55.
K2. Management systems for asset management: policy, strategy, objectives, plans and continual improvement.
K4. Different types of assets and classification approaches; hierarchy, function and value.
K6. Asset/system service and performance requirements; service level.
K7. Continuous improvement techniques.
K8. Asset costing and valuation techniques; cost estimation (maintenance, operation, renewal), depreciation, whole life costing, and social, environmental, safety and reputational cost.
K11. Asset life cycle activities: demand analysis and future requirements, creation and acquisition or rationalisation, operation, resilience, redundancy, shutdown, obsolescence, outage management, future asset capability.
K15. Types of asset maintenance: preventive, predictive, corrective.
K19. Sustainable development; impact on environment of asset management and asset management activities.
K20. Supply chain; types of suppliers, their role, and contractual relationships.
K21. Collaborative working techniques: personality types, influencing, negotiating, networking, and equality, diversity and inclusion.
K23. Business ethics including corporate governance, bribery, discrimination, socially responsible organisations.
Skills
S2. Identify asset service and performance requirements.
S8. Classify assets, asset systems, life cycle stages and activities.
S11. Select and apply fault finding technique(s) to identify causes and effects of assets/asset system failures.
S12. Apply continuous improvement techniques.

Behaviours

B3. Collaborates, within teams and across disciplines.

B4. Shares knowledge and good practice, gives and receives feedback, provides help and support.

B5. Adaptable for example, seeks new ways of doing things.

B7. Committed to continued professional development.

Grading descriptors

End-point assessment method 1: Project: business case and supporting evidence and presentation with questions

Theme KSBs	Pass, apprentices must demonstrate all the pass descriptors to pass	Distinction, in addition to the pass criteria, apprentices must demonstrate six out of nine of the following distinction descriptors to get a distinction
<p>Asset management concepts and systems</p> <p>K3 K5 K18</p> <p>S1 S14</p> <p>B1 B2</p>	<p>Identifies and describes the impact of organisational context/constraints on asset management: regulatory frameworks, stakeholders, governance and asset management policy, objectives strategy and plan. (K3, S1)</p> <p>Explains the effect of each asset in the system and describes the impact of external factors. (K5)</p> <p>Shows compliance with asset management standards, relevant organisational policies and current legislation. (K18, S14, B1)</p> <p>Establishes a focus on value and outcome within the project and reflects organisational objectives and stakeholder expectations. (B2)</p>	<p>Explains why it is necessary to comply with legislation, policies and asset management standards and justifies the approaches taken. (K18, S14, B1)</p>
<p>Asset management decision making</p> <p>K9 K10</p> <p>S4 S5 S6</p>	<p>Explains optioneering, cost benefit analysis and asset management multicriteria decision making. (K9)</p>	<p>Evaluates and justifies the selected decision support tools used to make asset management recommendations (K9, K10, S6)</p>

	<p>Demonstrates the use of creative thinking and problem-solving techniques to identify interventions for assets/asset system and estimate benefits. (K10, S4)</p> <p>Demonstrates the application of multi-criteria decision-making methods to proposed intervention options. (S5)</p> <p>Selects and applies decision support tools to make asset management recommendations. (S6)</p>	
<p>Asset life cycle K12 K13 S3 S7 S10</p>	<p>Develops an asset life-cycle plan including health, performance, condition, performance monitoring and business case, estimating and calculating LCC or TCO for assets/asset systems. (K12, K13, S3, S7, S10)</p>	<p>Reviews the life cycle plan and justifies the/any recommendations made. (K12, S7)</p>
<p>Risk management K16 K17 S13</p>	<p>Identifies and applies techniques to assess and quantify asset, asset system and asset management activity related risks, identifying mitigation options. (K16, K17, S13)</p>	<p>Compares and contrasts mitigation options and justifies recommendations made. (S13)</p>
<p>Project management K14 S9 B6</p>	<p>Applies project management, resource and time management to plan and manage the project, taking responsibility for work and seeking to deliver against objectives demonstrating reliability and self-motivation. (K14, S9, B6)</p>	<p>Evaluates their choice of project management techniques and justifies resource and time management. (K14, S9)</p>

Communication K22 S18	Identifies and applies selected communication techniques for the audience. (K22, S18)	Justifies selected techniques and methods of communication. (K22, S18)
Data analysis and presentation K24 S16 S17	Collates qualitative and quantitative asset/asset system data and information, identifies and applies data analysis, presentation and interpretation techniques. (K24, S16, S17)	Evaluates and justifies their choice of data analysis, presentation and interpretation techniques. (K24, S16, S17)
Information management K25 K26 S15	Identifies and uses IT systems and processes to complete their asset management project, working within the security/management requirements set out nationally and/or by their organisation. (K25, K26, S15)	Justifies choices made for IT systems and demonstrates use of advanced features of software for the projects benefit, such as improved organisation performance, ease of use. (K25, S15)
Fail – Apprentices will fail where they do not demonstrate all the pass descriptors		

End-point assessment method 2: Interview, underpinned by a portfolio of evidence

Theme KSBs	Pass Apprentices must demonstrate all the pass descriptors	Distinction Apprentices must demonstrate all the pass descriptors, plus a minimum of four out of six of the following distinction descriptors
Asset management concepts and systems K1 K2 K6 K7 S12 B5	<p>Outlines their approach to working that demonstrates adaptability in seeking new ways of working and how they apply continuous improvement techniques. (K7, S12, B5)</p> <p>Explains the management systems for asset management including standards, policy, strategy, objectives and plans, and details the service levels for asset/ system service and performance. (K1, K2, K6)</p>	<p>Evaluates how standards and management systems impact on the development of asset/system service and performance. (K1, K2, K6)</p> <p>Justifies continuous improvement techniques used, identifying strengths and limitations. (K7, S12)</p>
Asset management decision making K8 K19	<p>Defines asset costing and valuation techniques including cost estimation, depreciation, whole life costing and social, environmental, safety and reputational cost. Explains the impact to the environment of asset management in relation to sustainable development (K8, K19)</p>	<p>Evaluates the need to consider societal benefits in decision making (K8)</p>

<p>Asset management life cycle activities K4 K11 K15 S2 S8</p>	<p>Identifies and applies different types of asset and classification approaches to classify assets, asset systems, lift cycle stages and activities. (K4, S8)</p> <p>Describes asset lifestyle activities and types of asset maintenance. (K11, K15)</p> <p>Demonstrates the identification of asset service and performance requirements. (S2)</p>	<p>Critically analyses the classification of assets for asset management life cycle activities' (K4, S8)</p>
<p>Risk management S11</p>	<p>Identifies causes and effects of assets/asset system failures by selecting and applying fault finding techniques. (S11)</p>	<p>Justifies chosen fault-finding technique over others. (S11)</p>
<p>Resource management and collaboration K20 K21 K23 B3 B4</p>	<p>Explains their organisations asset management supply chain: types of suppliers, their role and contractual relationships. (K20)</p> <p>Explains how business ethics play a role in asset management (K23)</p> <p>Applies selected collaborative working techniques within teams and across disciplines. (K21, B3)</p> <p>Describes how they share knowledge and good practice, give and receive feedback and provides help and support. (B4)</p>	<p>Evaluates the role business ethics plays in asset management. (K23)</p>
<p>Continued professional development (B7)</p>	<p>Establishes an approach to CPD where commitment is demonstrated/reflected in their personal log of activities. (B7)</p>	
<p>Fail – Apprentices will fail where they do not demonstrate all the pass descriptors</p>		

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