

**End-point Assessment Plan (EPA) for the Integrated Degree Apprenticeship Standard for Senior/Head of Facilities Management Degree Level 6**

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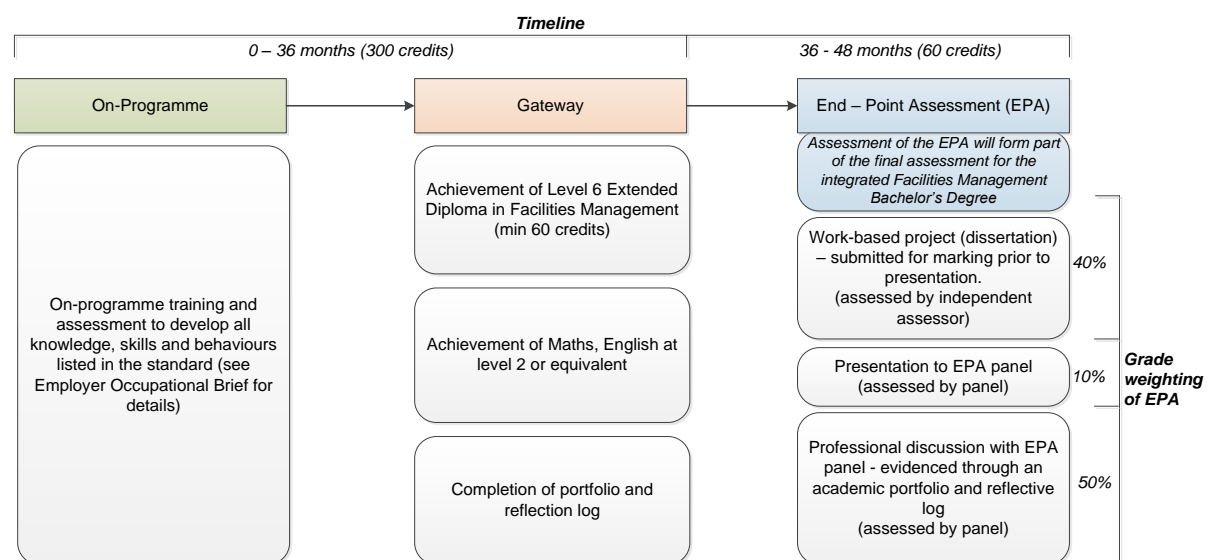
## Introduction and Overview

The Facilities Management (FM) Degree Apprenticeship is an integrated degree programme<sup>1</sup> where the End-Point Assessment (EPA) forms part of the achievement of the degree. The EPA is therefore assessed solely by the Higher Education Institution (HEI) awarding the degree. In its role as an Apprentice Assessment Organization (AAO), the HEI must be approved to offer this EPA and be included on the Register of Apprentice Assessment Organizations (RoAAO).

The indicative content of the apprenticeship standard and high level learning outcomes, which are amplified in the Employer Occupational Brief (EOB) (developed by the Trailblazer group) describe further detail of the knowledge, skills and behaviours that should be met for this role. The EOB is available from the British Institute of Facilities Management (BIFM) on request by emailing [qualifications@bifm.org.uk](mailto:qualifications@bifm.org.uk).

### Summary of Assessment

A diagrammatic representation of the assessment of this apprenticeship across its lifetime is as follows:



The end-point assessment will be synoptic in design, sampling a sufficiency of knowledge, skills and behaviours across the standard.

The synoptic end point assessment (EPA) will contain the following components which will form the final assessment of the FM degree (graded by HEIs):

- 1 FM work-based project;
- 2 presentation;
- 3 professional discussion with a panel based on the academic portfolio and reflective log.

<sup>1</sup> i.e. it is only available to apprentices.

<b>EPA Assessment Overview</b>				
<b>Assessment Method</b>	<b>Area Assessed</b>	<b>Assessed by</b>	<b>Grading</b>	<b>Weighting</b>
FM work-based project (dissertation)	Components of knowledge, skills and behaviours from across the standard (see EPA section)	Independent assessor	Fail, Pass, Merit, Distinction	40%
Presentation to a panel	Components of knowledge, skills and behaviours from across the standard (see EPA section)	Panel - see section on roles and responsibilities	Fail, Pass, Merit, Distinction	10%
Professional discussion with a panel based on the academic portfolio and reflective log	Components of knowledge, skills and behaviours from across the standard (see EPA section)	Panel - see section on roles and responsibilities	Fail, Pass, Merit, Distinction	50%
<b>On-programme Assessment</b>				
<p>Each employer will be required to develop its own apprenticeship programme in collaboration with a training provider mapped to the components of the standard (see the EOB for details).</p> <p>Employers will need to work with training providers to develop the learning programmes to enable apprentices to demonstrate the required knowledge, skills and behaviours prior to undertaking the end point assessment (EPA). It is estimated that the full length of the apprenticeship will be 42 to 48 months with the EPA typically taking place no later than 12 months from the end of the apprenticeship.</p> <p>During the degree, apprentices will be building an academic portfolio of evidence that is not marked until the EPA gateway is reached when it forms part of the gateway process. The academic portfolio will comprise a series of work-based projects as agreed between employers and training providers (see the EOB for caveats regarding opportunities for real work evidence). The structure and format of the work-based project reports will be specified by HEIs and agreed by employers. The content must meet the requirements of the eleven areas of the standard as described in detail by the EOB i.e. eleven reports. The maximum word count for each report is 6,000 words (although it is recognized that some reports will be shorter than others). Apprentices will therefore have demonstrated that the knowledge, skills and behaviours set out in the standard have been met prior to undertaking the EPA.</p> <p>On programme, apprentices must also achieve the BIFM L6 Extended Diploma in FM as mandated on the standard.</p> <p>Apprentices will also be developing a reflective log which should enable them to reflect on their experiences and learning. It will allow the assessment of an apprentice's knowledge, skills and behaviours relating to how they carried out work activities and projects. Most important, it will allow them to reflect on their strengths and areas for development.</p> <p>During the programme, apprentices will receive membership of BIFM at the Affiliate grade at no cost to the apprentice. HEIs are responsible for registering and paying the fees for BIFM membership (see <a href="http://www.bifm.org.uk">www.bifm.org.uk</a>).</p>				
<b>EPA Assessment Gateway</b>				
<p>Apprentices must demonstrate that they meet the knowledge, skills and behaviours of the standard before being considered for the EPA. The decision as to whether apprentices are ready to undertake the EPA should be made jointly by a panel comprising the employer and the HEI. The employer makes the final decision. HEIs are responsible for convening such panels on an as needs basis.</p> <p>It is recommended that a summary record of achievement be implemented to record and track learners' achievements through the on-programme assessment and which therefore provides the</p>				

auditable proof that apprentices have met the on-programme elements of the apprenticeship prior to taking the EPA. Summary records of achievement should link to the reflective log, the academic portfolio and take into account feedback from HEIs. The decision should be recorded in writing.

In order to proceed through the gateway to the EPA, apprentices must also have achieved the BIFM L6 Extended Diploma in FM (i.e. 60 credits) and the formal academic learning as defined by the HEI which equates to 300 on-programme credits. Apprentices without L2 English and Maths will need to achieve this level prior to taking the EPA.

It is expected that apprentices will typically be ready to undertake the EPA no later than 12 months from the end of the apprenticeship.

### **End-point - Assessment**

#### ***What and how***

The EPA equates to 60 credits.

Appendix A sets out which aspects of the standard will be assessed by which method.

The components for assessment in the EPA have been selected on the basis that they represent the higher order skills and knowledge of each area of the standard, achievement of which implies that apprentices will have met the lower order skills and knowledge.

Through the EPA, apprentices will have met the requirement for holistic assessment as a number of the components of the standard will have been covered. This will support apprentices in developing the ability to identify links between FM operations and responsibilities and between FM theory and FM practice. Assessment will also support individuals in their development of higher level thinking skills required for study at Level 6 (equivalent to Bachelor's degrees).

Apprentices will be carrying out a practical work-based project for the EPA which will result in a final report. The tasks that Apprentices must carry out are listed in Appendix A. Apprentices must produce evidence of what they have done. The word count for the report is 12,000 words +/- 10%. Other aspects of the standard not covered by the final report (see Appendix A) will then be tested in the professional discussion or the presentation.

The project must be agreed by the HEI and the employer and must be completed within the period of the EPA i.e. 12 months (see Appendix A).

The project report must have been assessed and receive a minimum of a pass before apprentices can make their presentations and attend the professional discussion.

The report will include an outline proposal and project plan as well as an introduction, literature review, research, findings, conclusions, recommendations. All work must be referenced appropriately using a referencing system as specified by the HEI e.g. Harvard or APA. Evidence of reflective learning must be included in the reflective log.

The presentation to the EPA panel must last no less than 30 minutes and, typically, no more than 45 minutes including 15 minutes for questions and answers. The date of the presentation should be agreed between the employer and the HEI and apprentices should be given sufficient notice to prepare their presentation and report. The topics that Apprentices must cover in the presentation are listed in Appendix A.

The professional discussion is on the areas listed in Appendix A which are evidenced through the academic portfolio and the reflective log. It must last no less than one and a half hours and a maximum of one and three quarter hours. The discussion must include reference to the behaviours expected. Panel members must have access to the academic portfolio and reflective log (which have been mapped to relevant areas of the standard) at least four weeks prior to the date of the discussion to enable them to review the documents and prepare themselves. A record of the discussion must be kept.

EPA panels should be convened by HEIs at times to suit their timetable but must not take place less frequently than once a year. The presentation and professional discussion should both take place on the same day, the professional discussion following immediately after the presentation.

The presentation and professional discussion should take place in a controlled environment in a suitable venue that is free from disturbances and of sufficient size to hold the apprentice and the

panel. Suitable technology should be available to enable apprentices to make their presentations and participate in the professional discussion.

### **Assessment tools**

HEIs will make available a template for the reflective log.

HEIs will make available checklists for the professional discussion (see Appendix B).

HEIs must make arrangements for recording the presentation and professional discussion which must be agreed by employers.

Ideally, the presentation and professional discussion should take place face-to-face on either the employer's or the HEI's premises. However, where this is not possible, remote technology may be used e.g. Skype, teleconferencing etc. However, when using remote means, care must be taken to confirm the identity of the apprentice. In this way, the needs of Small and Medium-sized Enterprises (SMEs) will be accommodated.

### **Who**

As the EPA forms part of the assessment for the degree, HEIs will be responsible for carrying out EPAs. HEIs will apply their customary assessment and moderation processes in accordance with Quality Assurance Agency (QAA's<sup>2</sup>) practice and policies which describe their usual working arrangements. An independent assessor who has not been involved in on-programme delivery and/or assessment will assess the EPA. If an HEI is unable to field an independent assessor from a different HEI, they may recruit one from within their own organization (provided that the individual concerned has not been involved in any training or assessment of the apprentice) or from a professional body. Preference should be given to an independent assessor from another HEI or professional body. Independent assessors will be responsible for making a casting vote to decide the final grading for the EPA when necessary.

The EPA panel will comprise HEI representation and an industry expert. The minimum requirements for assessors and the EPA panel are set out in the 'Roles and responsibilities' section of this document.

### **End-point – final judgement**

As the EPA forms part of the assessment for the degree, HEIs will be responsible for carrying out EPAs as described above in conjunction with the employer.

To deliver this EPA, HEIs must be included on the Register of Apprentice Assessment Organizations (RoAAO).

Any re-sits must be taken within the period of the EPA. HEIs must therefore have in place a re-sit process. No more than one re-sit for any component of the standard may be taken. In the event of a re-sit, the maximum grade that an apprentice may achieve is a pass. HEIs' policies on special considerations and reasonable adjustments apply.

### **Independence**

HEIs will apply their customary assessment and moderation processes in accordance with QAA's<sup>3</sup> practice and policies. Robust governance and impartiality across the EPA assessment is therefore achieved through the use of independent assessors.

The relationship between HEIs and apprentices is described in the 'Roles and responsibilities' section of this document.

HEIs must have a conflict of interest policy which ensures that any assessor must declare a known conflict of interest with an employer or an apprentice. A conflict of interest can be defined as a person who is connected with the development and/or delivery of the assessment and/or has interests in any other activity which has the potential to lead that person to act in a contrary manner to his or her involvement in the development and/or delivery of the EPA.

<sup>2</sup> Quality Assurance Agency for Higher Education

<sup>3</sup> *ibid*

**End-point – Grading**

The overall apprenticeship will be graded as: Fail, Pass, Merit and Distinction based on the marks achieved for each of the three EPA components as follows:

1. the FM work-based project (dissertation) (apprentices must gain a minimum of a pass in the work-based project prior to making the presentation and carrying out the professional discussion) (40% weighting);
2. the apprentice's presentation (10% weighting);
3. a professional discussion of the reflective log and their academic portfolio (50% weighting).

To achieve the apprenticeship, apprentices must gain a minimum of a pass in each component.

The grading criteria (Appendix C) are not progressive: if apprentices' work meets the merit or distinction criteria, then they may be awarded a merit or distinction directly.

Apprentices should be marked using the following points distribution which takes the weighting of each component into account.

Assessment	Points
Project report	x / 40
Presentation	x / 10
Professional discussion	x / 50
<b>Total</b>	<b>x / 100</b>

The table below sets out the equivalent points for each grade criterion.

Assessment	Maximum possible points	Pass (40 – 59%)	Merit (60 – 69%)	Distinction (70%+)
Project report	40	16 - 23	24 – 27	28 - 40
Presentation	10	4 – 5	6	7 - 10
Professional discussion	50	20 – 29	30 – 34	35 - 50
<b>Total</b>	<b>x / 100</b>			

**Pass: 40% - 59%**

**Merit: 60% - 69%**

**Distinction: 70% +**

Please refer to Appendix C for the full details of the grading criteria for each assessment method.

**End-point – Summary of roles and responsibilities**

Assessor	Role	Requirements
Employer	<ul style="list-style-type: none"> <li>• Makes the decision on when apprentices pass the gateway to the EPA in conjunction with the HEI</li> </ul>	Must make suitable resources available to apprentices including opportunities for offsite work and research where appropriate

	<ul style="list-style-type: none"> <li>• Agrees the suitability of the EPA work-based project in conjunction with the HEI</li> <li>• Creates opportunities for apprentices to carry out work and produce the project report</li> <li>• Contributes to the planning and delivery of the assessment</li> <li>• Monitors the performance of apprentices</li> <li>• Ensures apprentices work to agreed standards and deadlines</li> <li>• Makes time and resources available to enable apprentices to complete assessment tasks</li> <li>• Encourages continuing access to apprentices of mentors</li> </ul>	Allow apprentices sufficient time for study and assessment tasks (minimum 20% off the job training)
Industry expert	<ul style="list-style-type: none"> <li>• Participates in the EPA panel</li> <li>• Reviews reflective logs prior to EPA presentation and professional discussion</li> <li>• Assesses EPA presentation and professional discussion in conjunction with other panel members</li> <li>• Provides expert industry advice to AAO</li> </ul>	<p>Must comply with AAO requirements</p> <p>May be employer representative independent of the apprentice or from another organization with relevant sector-specific expertise</p> <p>Must be occupationally competent in FM i.e.:</p> <ul style="list-style-type: none"> <li>• have a minimum of 5 years' relevant FM experience at management level;</li> <li>• provide evidence of current FM-related CPD;</li> <li>• have an understanding of assessment</li> </ul>
HEI (AAO organization)	<ul style="list-style-type: none"> <li>• Develops assessment instruments and marking specifications based on the standard and assessment plan</li> <li>• Reviews and approves the suitability of EPA work-based project to be conducted in conjunction with the employer</li> <li>• Convenes and manages Assessment Gateway panels</li> <li>• Records the fact that apprentices are ready for the EPA in a record of achievement</li> <li>• Manages EPA assessment arrangements</li> </ul>	<p>Must be included on RoAAO</p> <p>Must have suitable and sufficient resources to enable apprentices to complete the programme</p> <p>Must have occupationally competent assessors i.e.:</p> <ul style="list-style-type: none"> <li>• hold a qualification at at least degree level and have a minimum of 5 years' relevant FM experience at management level;</li> <li>• provide evidence of current FM-related CPD;</li> </ul>



	<ul style="list-style-type: none"> <li>• Produces assessment guidance to guide apprentices and employers</li> <li>• Monitors the performance of apprentices during EPA</li> <li>• Liaises with employers and apprentices on progress and issues</li> <li>• Supports and agrees with employers on the timing of the gateway and EPA</li> <li>• Reviews and samples apprentices' work</li> <li>• Conducts quality assurance and standardisation activity to ensure the consistency of assessment</li> <li>• Provides final mark for the degree</li> <li>• Arranges re-takes/resits of assessments for apprentices where they fail assessments</li> <li>• Applies for apprenticeship completion certificates</li> </ul>	<ul style="list-style-type: none"> <li>• must hold a nationally regulated qualification in assessment.</li> </ul>
Assessment Gateway panel	<ul style="list-style-type: none"> <li>• Decides whether apprentices are ready to take the EPA (employer makes final decision)</li> <li>• Records decisions as to whether or not apprentices are ready to take the EPA</li> <li>• Communicates decisions and next steps to all parties</li> </ul>	Comprises subject-matter expert representatives of the employer and HEI
Independent assessor	<ul style="list-style-type: none"> <li>• Marks and grades assessments</li> <li>• Decides apprentices' final mark</li> <li>• Has final casting vote</li> <li>• Ensures EPAs are carried out in line with the assessment plan</li> </ul>	<p>Must be independent of the HEI tutor delivering the programme</p> <ul style="list-style-type: none"> <li>• Is employed by the AAO</li> </ul>
EPA panel	<ul style="list-style-type: none"> <li>• Reviews apprentices' academic portfolios, reports and reflective logs</li> <li>• Meets other panel members prior to presentation and discussion to plan both</li> <li>• Prepares probing questions for EPA professional discussion based on the academic portfolio and reflective log</li> <li>• Participates in EPA presentation and professional discussion</li> <li>• Grades EPA presentation and professional discussion</li> <li>• Confirms successful completion of the apprenticeship</li> </ul>	Comprises the independent assessor and occupationally competent industry expert working at a higher level than the apprentice

	<ul style="list-style-type: none"> <li>• Documents the final decision and the rationale for it</li> <li>• Provides feedback to apprentices, external examiners and other interested parties</li> <li>• Records and provides evidence of the EPA process and final result for external quality assurance purposes</li> </ul>	
<b>Internal Quality Assurance</b>		
<p>AAOs i.e. HEIs will ensure the consistency and validity of their assessment decisions in accordance with QAA requirements.</p> <p>HEIs are responsible for assuring the quality of assessment using a range of internal quality assurance processes i.e. standardization, cross-moderation, independent re-assessment and comparisons of assessor decisions.</p> <p>HEIs will run a standardization meeting for all assessors both initially and then at 6 monthly intervals. The standardization meeting exercises will involve all the assessors marking the same assessment evidence e.g. written submissions and videos of presentations and discussions and standardizing their assessment decisions.</p> <p>Internal quality assurance will be achieved by the HEI's internal quality assurer (IQA) sampling each independent assessor's allocation. This assessment sampling will be risk-based and will cover all candidate cohorts, assessment locations and assessors for a minimum of 10% and up to 100% of assessments.</p> <p>The IQA will investigate any assessment anomalies and risks and report these to the assessment organization.</p> <p>HEIs will need to demonstrate their capability to deliver internal quality assurance. This includes, but is not limited to:</p> <ul style="list-style-type: none"> <li>• managing the performance, training and professional development of assessors and IQAs including: <ul style="list-style-type: none"> <li>○ the EPA;</li> <li>○ the apprenticeship standard;</li> <li>○ grading criteria and marking schemes;</li> <li>○ examples of relevant evidence;</li> </ul> </li> <li>• putting in place a performance management process for assessors who do not meet the required standards;</li> <li>• monitoring assessor practice and decisions;</li> <li>• managing standardization and internal quality assurance activities and decisions;</li> <li>• having in place a complaints and appeals procedure that is compliant with QAA's requirements;</li> <li>• providing comparability and consistency of assessment decisions;</li> <li>• managing the improvement of quality of assessment practice;</li> <li>• managing and assuring the quality of any assessment delivered by sub-contractors;</li> <li>• providing regular risk-based reports of the internal quality assurance of assessment.</li> </ul> <p>HEIs are responsible for the delivery of the assessments around the country. To ensure the consistency of the assessment process, HEIs will ensure that:</p> <ul style="list-style-type: none"> <li>• all apprentices undertake an assessment that has been developed and verified as valid;</li> <li>• they have a reasonable adjustments policy. This will allow adjustments to be made to assessments or assessment arrangements. This will enable apprentices, irrespective of any permanent or temporary disability, to gain access to the assessment without undermining its consistency;</li> <li>• they will publish assessment arrangements and supporting guidance. The guidance will include the minimum standards for:</li> </ul>		

<ul style="list-style-type: none"> <li>○ facilities for the delivery of assessments;</li> <li>○ the security of assessment materials;</li> <li>● HEIs must have policies to gather feedback from apprentices to inform reviews of assessment arrangements;</li> <li>● they will undertake internal quality assurance activity to monitor the delivery of the assessments.</li> </ul> <p>This will ensure that apprentices have a consistent experience undertaking the assessment across the country.</p> <p>Any appeals in relation to the outcome of EPAs will be managed initially by the HEI and escalated to BIFM, as the external quality assurance organization as appropriate.</p> <p>Please refer to the “roles and responsibilities” section for details on assessor requirements.</p>
<b>External Quality Assurance (EQA)</b>
Because this is an integrated degree, QAA will provide external quality assurance.
<b>Implementation</b>
<p><b><i>Affordability</i></b></p> <p>The approach presented offers an affordable and scalable solution to assessment for this EPA. The approach is robust and will ensure the best use of time, ensuring an EPA that delivers an effective synoptic assessment at reasonable cost and through a delivery model which minimises time and adverse impact on the apprentice and employer.</p> <p>This model is expected to be deliverable for all employers, noting that, on the whole, Small and Medium-sized Enterprises may not have an in-house FM capability but outsource this to specialist FM companies.</p> <p>HEIs are encouraged to respond flexibly to employer requests for assessment on their own premises across the country. This will ensure that independent assessor time is maximised, and that employers and apprentices have easy access to EPAs with comparatively little time spent on travel and associated costs.</p> <p>The cost of the EPA represents no more than 20% of the total cost of delivering the apprenticeship.</p>
<p><b><i>Professional recognition</i></b></p> <p>Apprentices will be eligible for recognition by BIFM at the Affiliate Membership grade during the apprenticeship. BIFM membership includes resources (e.g. best practice guides, CPD events, website, and research papers) which will support apprentices throughout their learning journeys.</p> <p>On achievement of the full apprenticeship, they will have met the full requirements of the Member grade of membership and the academic criteria for Certified Membership (3 years’ management and FM experience is required to meet the full requirements of this grade of membership). Full eligibility details may be found at: <a href="http://www.bifm.org.uk">www.bifm.org.uk</a>.</p> <p>Apprentices may be eligible for membership of other professional bodies during and on completion of the apprenticeship.</p>
<p><b><i>Consistency</i></b></p> <p>Please refer to the “Independence” section for details as to how this will be achieved.</p>
<p><b><i>Volume</i></b></p> <p>The forecast is for 175 starts in the first year.</p>

## Appendix A

### Components of the standards to be covered by the EPA

The table below shows which aspects of the whole standard will be assessed in the EPA. The selection of the aspects of the standard to be assessed in the EPA have been chosen on the basis that they represent the higher order knowledge, skills and behaviours, achievement of which implies that lower order knowledge, skills and behaviours have also been achieved.

Apprentices will be assessed by three different assessment methods:

1. A practical, work-based project for which they must produce evidence of what they have done;
2. A professional discussion
3. A presentation.

Exactly what Apprentices must do for each assessment method is set out in the following tables.

<b>Assessment method: FM practical work-based project</b>			
<b>Assessment task</b> (what Apprentices must do and for which they must produce evidence)	<b>Area of standard covered</b> (the part of the Apprenticeship standard to which the assessment task relates)	<b>Higher order skills</b> (through carrying out the assessment task, Apprentices will demonstrate their higher order skills)	<b>Lower order skills</b> (by demonstrating their higher order skills, Apprentices will also be demonstrating their lower order skills)
Evaluate the scope and effectiveness of FM service delivery strategies and plans and identify the potential for innovation	2 FM service management	<ul style="list-style-type: none"> <li>• Lead on FM service delivery and identify opportunities for innovation that create value</li> <li>• Evaluate scope and effectiveness of FM service delivery</li> <li>• Evaluate effectiveness of FM service delivery and innovation</li> </ul>	<ul style="list-style-type: none"> <li>• Determine its feasibility</li> </ul>
Analyse the implications of compliance for an FM area of responsibility and clients including health, safety and sustainability	3 FM compliance	<ul style="list-style-type: none"> <li>• Scope and evaluate the extent and nature of FM compliance requirements and recommend actions that address the shortfalls</li> <li>• Assess risks and implications of non-compliance</li> </ul>	<ul style="list-style-type: none"> <li>• Differentiate compliance-related accountabilities</li> <li>• Monitor and report on compliance performance</li> </ul>

Develop change management plans and evaluate their effectiveness	6 Change and programme management in an FM context	<ul style="list-style-type: none"> <li>Assess the strategic impact of change</li> <li>Develop change management plans</li> <li>Evaluate effectiveness of change</li> </ul>	<ul style="list-style-type: none"> <li>Apply programme management techniques in an FM context</li> <li>Scope the need for change</li> </ul>
Develop financial cases for improvements to financial performance in FM, an operational plan and associated budget for the FM function	9 Finance and commerce	<ul style="list-style-type: none"> <li>Develop and implement FM operational business plans and budgets</li> <li>Evaluate commercial impact of decisions</li> </ul>	<ul style="list-style-type: none"> <li>Analyse implications of improvements</li> <li>Address FM budget variances</li> </ul>

<b>Assessment method: FM practical work-based project</b>			
<b>Assessment task</b> (what Apprentices must know and understand and for which they must produce evidence)	<b>Area of standard covered</b> (the part of the Apprenticeship standard to which the assessment task relates)	<b>Higher order knowledge</b> (through carrying out the assessment task, Apprentices will demonstrate their higher order knowledge)	<b>Lower order knowledge</b> (by demonstrating their higher order knowledge, Apprentices will also be demonstrating their lower order knowledge)
Challenges of FM service delivery and their potential impact e.g. legal, people-related, equality, inclusive access, environmental, sustainability, cost, lack of infrastructure	2 FM service management	<ul style="list-style-type: none"> <li>Service delivery models and their implications</li> <li>Analysis &amp; interpretation of data</li> <li>Trends in FM services &amp; delivery models</li> <li>Quantitative and qualitative analysis</li> </ul>	<ul style="list-style-type: none"> <li>Service delivery requirements</li> </ul>
FM compliance-related costs (financial and non-financial) including the costs associated with the recommendations that address shortfalls in FM compliance	3 FM compliance	<ul style="list-style-type: none"> <li>Calculating cost &amp; consequences of compliance and non-compliance</li> <li>Governance requirements</li> <li>Risk evaluation</li> <li>Development of risk mitigation plans</li> </ul>	<ul style="list-style-type: none"> <li>Drivers to compliance</li> <li>Relevant legislation</li> <li>Risk management techniques</li> <li>How to establish monitoring arrangements</li> </ul>
The principles of change management and current theories	6 Change and programme	<ul style="list-style-type: none"> <li>Characteristics &amp; uses of programme</li> </ul>	

and techniques of programme management in relation to FM	management in an FM context	management theories and techniques <ul style="list-style-type: none"> <li>• Strategic impact of change on FM services and teams</li> </ul>	
The process of developing and presenting business and financial cases for FM investment or expenditure	9 Finance and commerce	<ul style="list-style-type: none"> <li>• Interpretation of financial reports</li> <li>• Business planning techniques</li> <li>• How to evaluate financial performance</li> </ul>	<ul style="list-style-type: none"> <li>• How income is generated in FM</li> <li>• Setting &amp; managing budgets</li> <li>• Use of capital and revenue budgets</li> </ul>

<b>Assessment method: FM work-based project</b>	
<b>Behaviours</b>	<b>Behavioural descriptors</b>
Customer focus	Exceed customer expectations and add value
Collaboration	Work in partnership with others for the common good
Innovation and quality	Aim for a higher level of excellence
Ethics and integrity	Work for the greater good and not sacrifice high standards for immediate gain or personal benefit
Leading people	Foster the growth of themselves and others, inspiring them to exceed their personal and professional goal
Systematic approach	Approach work in an orderly way

<b>Assessment method: Professional discussion</b>			
<b>Assessment task</b> (what Apprentices must do and for which they must produce evidence through the discussion)	<b>Area of standard covered</b> (the part of the Apprenticeship standard to which the assessment task relates)	<b>Higher order skills</b> (through carrying out the assessment task, Apprentices will demonstrate their higher order skills)	<b>Lower order skills</b> (by demonstrating their higher order skills, Apprentices will also be demonstrating their lower order skills)
Develop a property management strategy for a portfolio of properties	1 Strategic property asset management	<ul style="list-style-type: none"> <li>• Manage portfolios of FM property assets strategically</li> <li>• Develop property management strategy</li> <li>• Identify value creation opportunities</li> </ul>	<ul style="list-style-type: none"> <li>• Evaluate, monitor and control premises, fabric &amp; building services</li> </ul>
Develop FM quality management strategy	4 FM management systems	<ul style="list-style-type: none"> <li>• Evaluate FM management</li> </ul>	<ul style="list-style-type: none"> <li>• Evaluate effectiveness of</li> </ul>

		<p>information systems to develop FM knowledge and enable quality management</p> <ul style="list-style-type: none"> <li>• Develop FM quality management strategy, policies, plans and procedures</li> </ul>	<p>FM information systems</p> <ul style="list-style-type: none"> <li>• Make recommendations for improvement</li> </ul>
Evaluate the effectiveness of the FM business continuity plan and make practicable recommendations	7 Business continuity in an FM context	<ul style="list-style-type: none"> <li>• Develop and evaluate FM business continuity plans (BCP)</li> <li>• Test &amp; evaluate effectiveness of BCP plans</li> </ul>	<ul style="list-style-type: none"> <li>• Scope and role of FM in BCP</li> </ul>
Identify the current capability and performance and future development needs of themselves and FM teams, leading and motivating FM teams	8 Operational and technical leadership in FM	<ul style="list-style-type: none"> <li>• Lead and develop the FM workforce to manage assets and deliver services</li> <li>• Manage teams to achieve FM objectives</li> <li>• Evaluate personal effectiveness</li> </ul>	<ul style="list-style-type: none"> <li>• Plan &amp; resource teams</li> </ul>
Evaluate the effectiveness of current FM procurement policies, practices and arrangements	10 Procurement & contract management	<ul style="list-style-type: none"> <li>• Procure FM-related goods and services and manage FM supplier and/or contract performance, driving through efficiency and value for money in the supply chain</li> <li>• Evaluate effectiveness of procurement arrangements</li> <li>• Evaluate supplier proposals</li> <li>• Agree contracts</li> </ul>	<ul style="list-style-type: none"> <li>• Monitor contracts</li> <li>• Manage supplier performance</li> </ul>
Develop a Corporate Social Responsibility (CSR) plan within your area of FM responsibility	11 Social responsibility	<ul style="list-style-type: none"> <li>• Develop and evaluate a Corporate Social Responsibility (CSR) plan aligned with the corporate FM strategy</li> </ul>	<ul style="list-style-type: none"> <li>• Implement &amp; evaluate CSR plan</li> <li>• Promote CSR activities</li> </ul>

		<ul style="list-style-type: none"> <li>Evaluate social, economic, environmental &amp; ethical responsibilities</li> <li>Encourage innovation in CSR in FM function</li> </ul>	
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<b>Assessment method: Professional discussion</b>			
<b>Assessment task</b> (what must be discussed)	<b>Area of standard covered</b> (the part of the Apprenticeship standard to which the assessment task relates)	<b>Higher order knowledge</b> (through carrying out the assessment task, Apprentices will demonstrate their higher order knowledge)	<b>Lower order knowledge</b> (by demonstrating their higher order knowledge, Apprentices will also be demonstrating their lower order knowledge)
The requirements and scope of strategic property asset management, property ownership, legal requirements and clients' needs	1 Strategic property asset management	<ul style="list-style-type: none"> <li>Requirements of strategic asset management</li> <li>Option appraisal techniques</li> </ul>	<ul style="list-style-type: none"> <li>Requirements of an occupancy strategy</li> <li>Ergonomics</li> </ul>
The characteristics, functionality and limitations of FM management information systems to collect, process, communicate and store information	4 FM management systems	<ul style="list-style-type: none"> <li>ISO 41001 (international standard)</li> <li>"Smart building" technology</li> <li>Data analysis and operation</li> <li>Strategic quality management approaches</li> </ul>	<ul style="list-style-type: none"> <li>Functionality &amp; limitations of management information solutions</li> <li>How to validate &amp; extract information from data sources</li> <li>Flow of information within an organization</li> </ul>
The components and use of an effective business continuity plans and critical incident management within operational FM services	7 Business continuity in an FM context	<ul style="list-style-type: none"> <li>Analyses of the links between organizational strategies and plans</li> <li>FM-related risks and BCP requirements</li> </ul>	
Theories of leadership and motivation of individuals and teams in the delivery of FM	8 Operational and technical leadership in FM	<ul style="list-style-type: none"> <li>FM technical leadership and management</li> </ul>	<ul style="list-style-type: none"> <li>FM resource, capacity and succession planning</li> </ul>



		<ul style="list-style-type: none"> <li>• HR-related legislation affecting the FM function</li> <li>• Employee relations</li> </ul>	
The relevance of organization's business strategy and growth targets to FM procurement and contracting	10 Procurement & contract management	<ul style="list-style-type: none"> <li>• FM procurement policy and practices within an overall procurements framework</li> </ul>	<ul style="list-style-type: none"> <li>• Types of contract (local, organization-side, formal, informal)</li> <li>• Contract management techniques</li> </ul>
The nature and value of corporate responsibility within the facilities management industry and their impact	11 Social responsibility	<ul style="list-style-type: none"> <li>• Compliance requirements and their impact on FM</li> </ul>	<ul style="list-style-type: none"> <li>• Relationship between CSR activities &amp; FM business objectives</li> </ul>

<b>Assessment method: professional discussion</b>	
<b>Behaviours</b>	<b>Behavioural descriptors</b>
Customer focus	Exceed customer expectations and add value
Collaboration	Work in partnership with others for the common good
Influencing	Anticipating and responding to others' needs and influencing them to enhance performance
Innovation and quality	Aim for a higher level of excellence
Ethics and integrity	Work for the greater good and not sacrifice high standards for immediate gain or personal benefit
Leading people	Foster the growth of themselves and others, inspiring them to exceed their personal and professional goal
Systematic approach	Approach work in an orderly way

<b>Assessment method: Presentation</b>			
<b>Assessment task</b>	<b>Area of standard covered</b> (the part of the Apprenticeship standard to which the assessment task relates)	<b>Higher order skills</b> (through carrying out the assessment task, Apprentices will demonstrate their higher order skills)	<b>Lower order skills</b> (by demonstrating their higher order skills, Apprentices will also be demonstrating their lower order skills)
Apprentices must make a presentation on the following:			
Develop an FM strategy and policies	5 Development and implementation of FM strategy and policy	<ul style="list-style-type: none"> <li>• Develop and implement FM strategy and policy for a portfolio of FM services</li> </ul>	<ul style="list-style-type: none"> <li>• Ensure policies are ethical, sustainable and aligned with the strategy</li> </ul>

		<ul style="list-style-type: none"> <li>Analyse internal &amp; external environment</li> <li>Evaluate effectiveness of FM stakeholder arrangements</li> </ul>	
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<b>Assessment method: Presentation</b>			
<b>Assessment task</b>	<b>Area of standard covered</b> (the part of the Apprenticeship standard to which the assessment task relates)	<b>Higher order knowledge</b> (through carrying out the assessment task, Apprentices will demonstrate their higher order knowledge)	<b>Lower order knowledge</b> (by demonstrating their higher order knowledge, Apprentices will also be demonstrating their lower order knowledge)
The principles of strategic management and an organization's strategic process	5 Development and implementation of FM strategy and policy	<ul style="list-style-type: none"> <li>Trends in FM &amp; FM profession</li> <li>Strategic planning techniques</li> <li>FM delivery plans for a range of contexts</li> </ul>	<ul style="list-style-type: none"> <li>Scope of FM</li> <li>Contribution of FM to the success of an organization and the economy</li> <li>Stakeholder management</li> </ul>

<b>Assessment method: Presentation</b>	
<b>Behaviours</b>	<b>Behavioural descriptors</b>
Customer focus	Exceed customer expectations and add value
Influencing	Anticipating and responding to others' needs and influencing them to enhance performance

**Appendix B****Checklist for presentation and professional discussion****Apprentice name**

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**Organization**

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**Current position**

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**University**

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**Assessor name**

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**Organization**

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**Current position**

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**Date**

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The purpose of the EPA panel is to confirm the apprentice's competence through probing the apprentice's achievements and rationale for their decisions and actions to ensure that the requirements of the standard have been met.

This checklist is designed as a starting point to help EPA panel members ensure that apprentices demonstrate those aspects of the knowledge, skills and behaviours required of them by the Apprenticeship Standard for Senior/Head of Facilities Management Degree (L6) through the presentation and professional discussion.

Apprentices will already have completed an EPA project and written a report (dissertation) based on that project. The apprentice will make a presentation on his or her:

- academic portfolio;
- reflective log.

Apprentices may also choose to use their work-based project report to support their claims to competence.

Panel members are referred to the Employer Occupational Brief for more detail. Panel members should remember to ask open, non-directive questions. They should record apprentices' answers as their performance in the presentation and professional discussion will affect their final apprenticeship grade. Suggested questions and space for recording answers have been provided for assessment of apprentices' knowledge, skills and behaviours in this document.

<b>EPA panel members (name)</b>	<b>EPA panel members (organization)</b>
To be completed	To be completed
To be completed	To be completed

Aspect of standard	Interview questions	Apprentice response & interview notes
<p>5 Develop an FM strategy and policies (skill)</p> <p>The principles of strategic management and an organization's strategic process (knowledge)</p> <p>To be assessed through the presentation</p>	<p>What factors did you take into account?</p> <p>On what did you base your conclusions?</p> <p>What use did you make of academic learning in a practical way?</p> <p>What were the outcomes of this?</p> <p>How was your work received?</p>	
<p>1 Develop a property management strategy for a portfolio of properties (skill)</p> <p>The requirements and scope of strategic property asset management, property ownership, legal requirements and clients' needs (knowledge)</p> <p>To be assessed through the professional discussion</p>	<p>What factors did you take into account?</p> <p>On what did you base your conclusions?</p> <p>What use did you make of academic learning in a practical way?</p> <p>What were the outcomes of this?</p> <p>How was your work received?</p>	
<p>4 Develop an FM quality management strategy and associated policies (skill)</p> <p>The characteristics, functionality and limitations of FM management information systems to collect, process, communicate and store information (knowledge)</p> <p>To be assessed through the professional discussion</p>	<p>What factors did you take into account?</p> <p>On what did you base your conclusions?</p> <p>What use did you make of academic learning in a practical way?</p> <p>What were the outcomes of this?</p>	

	<p>How was your work received?</p>	
<p>7 Evaluate the effectiveness of the FM business continuity plan and make practicable recommendations (skill)</p> <p>The components and use of an effective business continuity plans and critical incident management within operational FM services (knowledge)</p> <p>To be assessed through the professional discussion</p>	<p>What factors did you take into account?</p> <p>On what did you base your conclusions?</p> <p>What use did you make of academic learning in a practical way?</p> <p>What were the outcomes of this?</p> <p>How was your work received?</p>	
<p>8 Identify the current capability and performance and future development needs of themselves and FM teams, leading and motivating FM teams (skill)</p> <p>Theories of leadership and motivation of individuals and teams in the delivery of FM (knowledge)</p> <p>To be assessed through the professional discussion</p>	<p>What factors did you take into account?</p> <p>On what did you base your conclusions?</p> <p>What use did you make of academic learning in a practical way?</p> <p>What were the outcomes of this?</p> <p>How was your work received?</p>	
<p>10 Evaluate the effectiveness of current FM procurement policies, practices and arrangements (skill)</p> <p>The relevance of organization's business strategy and growth targets to FM procurement and contracting (knowledge)</p> <p>To be assessed through the professional discussion</p>	<p>What factors did you take into account?</p> <p>On what did you base your conclusions?</p> <p>What use did you make of academic learning in a practical way?</p> <p>What were the outcomes of this?</p>	

How was your work received?

<p>11 Develop a Corporate Social Responsibility (CSR) plan within your area of FM responsibility (skill)</p> <p>The nature and value of corporate responsibility within the facilities management industry and their impact (knowledge)</p> <p>To be assessed through the professional discussion</p>	<p>What factors did you take into account?</p> <p>On what did you base your conclusions?</p> <p>What use did you make of academic learning in a practical way?</p> <p>What were the outcomes of this?</p> <p>How was your work received?</p>	
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<b>Behaviours</b>	<b>Interview questions</b>	<b>Apprentice response &amp; interview notes</b>
<p><b>1 Customer focus:</b> Exceeding customer expectations and adding value</p>	<p>What did you do to find out the customer's needs?</p> <p>How were these mapped?</p> <p>What did you do to solve a customer's problem?</p> <p>How successful was this and how was it used?</p> <p>Why was that?</p> <p>What did/would you do to embed success into day-to-day-business?</p>	

<p><b>2 Influencing:</b> Anticipating and responding to others' needs and influencing them to enhance performance</p>	<p>Describe what you did and why on an occasion when you had to adapt your communication style to different stakeholders</p> <p>What was the effect and result?</p> <p>Why was that?</p> <p>How might your knowledge of someone else influence your style of communication (written or spoken)?</p> <p>What factors would you take into account to make a presentation engaging, interesting and informative?</p>	
<p><b>3 Collaboration:</b> Working in partnership with others for the common good</p>	<p>Describe a time when you took someone else's opinions or advice into account when making a decision</p> <p>How did this influence the outcome?</p> <p>What factors might influence a collaborative working arrangement positively?</p> <p>To what extent is building consensus an important factor in facilities management?</p>	



<p><b>4 Innovation and quality:</b> Aiming for a higher level of excellence</p>	<p>Describe a time when you suggested an innovation or improvement</p> <p>How did you spot the opportunity?</p> <p>What factors did you take into account in deciding that it would be valuable and worthwhile?</p> <p>How was the idea received and what factors did you take into account in promoting it?</p>	
<p><b>5 Strategic thinking:</b> Seeing the “bigger picture” to enable an organization to meet or exceed its strategic intentions</p>	<p>How do/would you go about anticipating market trends?</p> <p>Describe a time when you identified developments within facilities management that might affect business strategy</p> <p>What factors did/would you take into account in weighing up the implications of commercial imperatives?</p>	
<p><b>6 Ethics and integrity:</b> Working for the greater good and not sacrificing high standards for immediate gain or personal benefit</p>	<p>Describe how standards of social responsibility and sustainability can affect facilities management</p> <p>Describe a situation in which you might be tempted to cut corners or give in to others: what might you do to resolve such tensions?</p> <p>What impact might there be on facilities management if an organization were to behave in an unethical way?</p>	

	<p>Describe a situation where you adapted your behaviour to suit the situation. How did you decide you needed to do this and what were the results?</p>	
<p><b>7 Leading people:</b> Fostering the growth of themselves and others, inspiring them to exceed their personal and professional goals</p>	<p>What factors would you take into account in motivating team members?</p> <p>Why and how might a leader's leadership style be adapted to a fit situation?</p> <p>On what basis have/might you identify someone's development needs?</p>	
<p><b>8 Systematic approach:</b> Approaching work in an orderly way</p>	<p>What techniques do/might you use to manage your time and workload?</p> <p>How effective are they?</p> <p>What might you do to manage your time and workload better?</p>	

**Other comments**

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**Assessor final decision**

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**Assessor signature**

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## Appendix C

**Grading criteria for the project report, presentation and professional discussion (Fail/Pass/Merit/Distinction)**

The grading criteria below are not progressive: if apprentices' work meets the merit or distinction criteria, then they may be awarded a merit or distinction directly.

**Project report (Fail/Pass/Merit/Distinction)**

Level 6	Apprentices who fail may:	To achieve a pass (40% – 59%), apprentices must:	To achieve a merit (60% - 69%), apprentices must:	To achieve a distinction (70%+), apprentices must:
	<ul style="list-style-type: none"> <li>Fail to provide evidence of meeting all the knowledge, skills and behavioural requirements set out in Appendix A</li> </ul>	<ul style="list-style-type: none"> <li>Recommend initiatives that support and improve the performance of FM assets and services</li> <li>Articulate how the project recommendations will secure improved future FM business performance</li> <li>Apply relevant standards, regulations, policies and legislation to FM operations including health and safety, equality, inclusive access and sustainability</li> <li>Identify the implications to an organization of shortfalls in FM compliance</li> <li>Provide evidence of how they achieved alignment between an FM quality management strategy and organizational FM strategy</li> <li>Develop a robust business case that takes account of financial and legal aspects and addresses FM risk</li> </ul>	<ul style="list-style-type: none"> <li>Analyse and present recommendations in a robust FM business plan that includes a range of options and reasons for their inclusion or rejection</li> <li>Analyse the implications to clients of FM non-compliance</li> <li>Analyse the criteria that constitute viability in recommendations for improvements to FM information management systems</li> <li>Consider the impact of anticipated changes in technology on FM business operating procedures</li> <li>Analyse the influence of an organization's attitude to risk in operational business plans and budgets</li> </ul>	<ul style="list-style-type: none"> <li>Evaluate the implications of the full range of internal and external challenges of FM service delivery</li> <li>Justify the basis of the calculation of feasibility and viability of their FM innovations</li> <li>Evaluate the value of clients to an organization in terms of FM compliance</li> <li>Provide evidence of the economic value to an organization of their FM quality strategy</li> <li>Justify their recommendations for FM investment or expenditure</li> </ul>

**Presentation (Fail/Pass/Merit/Distinction)**

Level 6	Apprentices who fail may:	To achieve a pass (40% – 59%), apprentices must:	To achieve a merit (60% - 69%), apprentices must:	To achieve a distinction (70%+), apprentices must:
	<ul style="list-style-type: none"> <li>• Fail to provide evidence of meeting all the knowledge, skills and behavioural requirements set out in Appendix A</li> </ul>	<ul style="list-style-type: none"> <li>• Develop an FM strategy that is responsive to change and is capable of delivering an organization's objectives</li> <li>• Structure the presentation well, summarizing all major points of the final project</li> <li>• Answer all questions competently and display a clear understanding of the subject</li> </ul>	<ul style="list-style-type: none"> <li>• Provide evidence of how they applied the principles of strategic management to the development of an FM strategy</li> <li>• Justify the rationale for their recommendations and conclusions</li> <li>• Use a range of tools and techniques to present their ideas and recommendations to persuade their audience</li> </ul>	<ul style="list-style-type: none"> <li>• Evaluates the influence of organizational culture and values in the development of an FM strategy</li> <li>• Evaluate the impact on the organization of their recommendations</li> <li>• Consider the impact of alternative solutions on an organization</li> <li>• Assimilate and synthesize information to convince their audience</li> </ul>

### Professional discussion (Fail/Pass/Merit/Distinction)

Level 6	Apprentices who fail may:	To achieve a pass (40% – 59%), apprentices must:	To achieve a merit (60% - 69%), apprentices must:	To achieve a distinction (70%+), apprentices must:
	<ul style="list-style-type: none"> <li>Fail to provide evidence of meeting all the knowledge, skills and behavioural requirements set out in Appendix A</li> </ul>	<ul style="list-style-type: none"> <li>Analyse the integrity of FM assets and the cost of their optimization</li> <li>Provide evidence of the use of project management principles, tools and processes</li> <li>Evaluate the effectiveness of FM business continuity plans</li> <li>Provides evidence that reflection has supported their personal continuous development</li> <li>Evaluate the effectiveness of FM procurement policies, practices and arrangements</li> <li>Justify the way in which an FM Corporate Social Responsibility (CSR) plan addresses the political, economic, environmental and social context of the FM industry</li> </ul>	<ul style="list-style-type: none"> <li>Explain the range of impacts of their decisions and actions and justify their actions</li> <li>Analyses the needs, costs and benefits of asset management throughout an asset's lifecycle</li> <li>Analyse the effectiveness of an FM change project against agreed criteria</li> <li>Justify the rationale for their recommendations for improvements to FM business continuity plans</li> <li>Provide evidence of the effectiveness of their leadership skills</li> <li>Justify the rationale for their recommendations for improvements to FM procurement policies, practices and arrangements</li> <li>Analyse the value of an FM Corporate Social Responsibility (CSR) plan to an organization</li> </ul>	<ul style="list-style-type: none"> <li>Evaluate the strategic benefits and requirements of asset management</li> <li>Evaluate the strategic implications of an FM change project</li> <li>Evaluate the characteristics and links between FM business continuity plans and critical incident management within FM operations</li> <li>Provide evidence of their leadership skills across their organization</li> <li>Evaluate the relevance of an organization's business strategy and growth targets to FM procurement and contracting</li> <li>Evaluate the influence of FM Corporate Social Responsibility (CSR) activities on the industry and/or society</li> </ul>

### Overall Apprenticeship grading (Fail/Pass/Merit/Distinction)

There are three components to the EPA:

1. FM work-based project (dissertation) (40% weighting);
2. presentation of the project report (10% weighting);
3. professional discussion with a panel based on the project report, academic portfolio and reflective log (50% weighting).

All components must be achieved at a minimum of a pass.

Apprentices should be marked using the following points distribution which takes the weighting of each component into account.

Assessment	Points
Project report	x / 40
Presentation	x / 10
Professional discussion	x / 50
<b>Total</b>	<b>x / 100</b>

Assessment	Maximum possible points	Pass (40 – 59%)	Merit (60 – 69%)	Distinction (70%+)
Project report	40	16 - 23	24 – 27	28 - 40
Presentation	10	4 – 5	6	7 - 10
Professional discussion	50	20 – 29	30 – 34	35 - 50
<b>Total</b>	<b>x / 100</b>			

**Pass:** 40% - 59%

**Merit:** 60% - 69%

**Distinction:** 70% +



