

**End-point Assessment Plan (EPA) for the Apprenticeship Standard for Facilities Manager  
Level 4**

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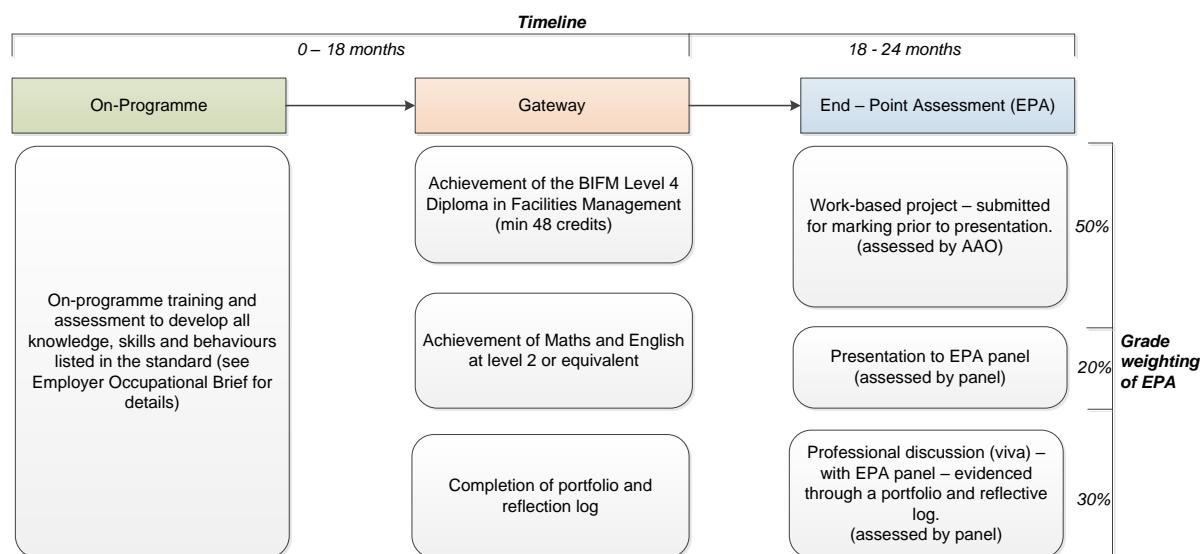
## Introduction and Overview

The Facilities Manager apprenticeship is designed to operate as the professional standard for people working in facilities management (FM) at level 4.

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) cover 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:

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

### EPA Assessment Overview

Assessment Method	Area Assessed	Assessed by	Grading	Weighting
FM work-based project	Components of knowledge, skills and behaviours from across the standard (see EPA section)	Apprenticeship Assessment Organization (AAO)	Fail, Pass, Merit, Distinction	50%
Presentation to a panel	Component of quality management knowledge and skill (see EPA section)	AAO-led panel - see section on roles and responsibilities	Fail, Pass, Merit, Distinction	20%

Professional discussion with a panel based on the portfolio and reflective log	Components of knowledge, skills and behaviours from across the standard (see EPA section)	AAO led-panel - see section on roles and responsibilities	Fail, Pass, Merit, Distinction	30%
<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 18 to 24 months with the EPA typically taking place no later than 6 months from the end of the apprenticeship.</p> <p>During the programme, apprentices will be building a portfolio of work-based and academic evidence that is not marked until the EPA is reached. The portfolio will comprise a series of work-based projects as agreed between employers and training providers. The structure and format of the work-based project reports will be specified by providers and agreed by employers. The content must meet the requirements of the eight areas of the standard as described in detail by the EOB i.e. eight projects. The maximum word count for each report is 4,000 words (although it is recognized that some reports will be shorter than others). This is to ensure that apprentices demonstrate the knowledge, skills and behaviours set out in the standard have been met prior to the apprentice undertaking the EPA.</p> <p>On programme, apprentices must also achieve BIFM Level 4 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.</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 training provider. The employer makes the final decision. Training providers 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 auditable proof that apprentices have met the requirements 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.</p> <p>In order to proceed through the gateway to the EPA, apprentices must also have achieved the BIFM L4 Diploma in FM (i.e. a minimum of 48 credits). Apprentices without L2 English and Maths will need to achieve this level prior to taking the EPA.</p> <p>It is expected that apprentices will typically be ready to undertake the EPA no later than 6 months from the end of the apprenticeship.</p>				
<b>End-point - Assessment</b>				
<p><b>What and how</b></p> <p>Appendix A sets out which aspects of the standard will be assessed by which method.</p>				

The components for assessing 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 4.

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 8,000 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 presentation.

The project must be agreed by the assessment organization and the employer and must be completed within the period of the EPA i.e. 6 months.

The project report must have been assessed and received 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 AAO e.g. Harvard or APA. Evidence of reflective learning must be included in the reflective log.

The presentation must last no less than 15 minutes, and no more than 20 minutes with up to a further 10 minutes for questions and answers. The date of the presentation should be agreed between the employer and the AAO and apprentices should be given sufficient notice to prepare their presentation. 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 portfolio and reflective log. Apprentices may wish to use their report as further evidence. It must last no less than 45 minutes and a maximum of an hour. The discussion must include reference to the behaviours expected. Panel members must have access to the portfolio, the report and the 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 must be convened by AAOs not less than twice a year at regular intervals. 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 must 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 must be available to enable apprentices to make their presentations and participate in the professional discussion.

### **Assessment tools**

Training providers will make available a template for the reflective log.

AAOs will make use of recommended checklists for the professional discussion (see Appendix B).

AAOs 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, the training provider's or the AAO'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**

The EPA panel will comprise one representative from the AAO 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.

The AAO must be on the Register of Apprentice Assessment Organizations (RoAAO) and must be accepted for the delivery of assessment of this standard. It will apply its quality assurance processes to ensure independence and impartiality of assessment e.g. the requirement for EPA assessors to be different from those carrying out on programme training and assessment. Consequently, robust governance across the EPA is achieved through the use of independent assessors. The AAO must have in place policies and processes to address situations where there is a disagreement of opinion and it will have the casting vote.

#### **End-point – final judgement**

The AAO is responsible for carrying out EPAs as described above in conjunction with an industry expert and issuing the final grade.

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

#### **Independence**

AAOs must have in place assessment and moderation processes in accordance with BIFM's requirements as the industry professional body and provider of External Quality Assurance. Robust governance and impartiality across the EPA assessment is therefore achieved through the use of independent, external assessors i.e. independent of the training provider.

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

AAOs 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.

#### **End-point – Grading**

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

- 1 the FM work-based project (apprentices must gain a minimum of a pass in the work-based project prior to making the presentation and carrying out the professional discussion (50% weighting);
- 2 the apprentice's presentation (20% weighting);
- 3 professional discussion of the reflective log and their portfolio (30% 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.

<b>Assessment</b>	<b>Points</b>
Project report	x / 50
Presentation	x / 20
Professional discussion	x / 30

<b>Total</b>	<b>x / 100</b>	
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The table below sets out the equivalent points for each grade criterion.

<b>Assessment</b>	<b>Maximum possible points</b>	<b>Pass (40 – 59%)</b>	<b>Merit (60 – 69%)</b>	<b>Distinction (70%+)</b>
Project report	50	20 – 29	30 – 34	35 - 50
Presentation	20	8 – 11	12 – 13	14 - 20
Professional discussion	30	12 – 17	18 – 20	21 - 30
<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**

<b>Assessor</b>	<b>Role</b>	<b>Requirements</b>
Employer	<ul style="list-style-type: none"> <li>• Makes decision on when apprentices pass the gateway to the EPA in conjunction with the training provider</li> <li>• Agrees the suitability of EPA work-based project to be conducted in conjunction with the AAO</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> <li>• May act as the industry expert on EPA panel</li> </ul>	<p>Must make suitable resources available to apprentices including opportunities for offsite work and research where appropriate</p> <p>Allow apprentices sufficient time for study and assessment tasks (minimum 20% off the job training)</p>

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>Is employed by AAO</p>
AAO	<ul style="list-style-type: none"> <li>Develops assessment instruments and marking specifications based on the standard and the 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> <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>Ensures EPAs are carried out in line with the assessment plan</li> <li>Marks and grades assessments</li> <li>Conducts quality assurance and standardization activity to ensure the consistency of assessment</li> <li>Decides apprentices' final mark</li> <li>Arranges re-takes/resits of assessments for apprentices where they fail assessments</li> <li>Applies for apprenticeship completion certificates</li> </ul>	<p>Must be included on RoAAO</p> <p>Must be independent of the delivery of on-programme training</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 in FM or a related subject at at least level 5 or above or a minimum of 3 years' relevant FM experience at management level;</li> <li>provide evidence of current FM-related CPD;</li> <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> </ul>	Comprises subject-matter expert representatives of the employer and the AAO

	<ul style="list-style-type: none"> <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>	
EPA panel	<ul style="list-style-type: none"> <li>Reviews apprentices' 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 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> <li>Decides the final grade with the AAO representative having the final casting vote</li> <li>Documents the final decision and the rationale for it</li> <li>Provides feedback to apprentices and other interested parties</li> <li>Records and provides evidence of the EPA process and final result for external quality assurance purposes</li> </ul>	Comprises the AAO assessor and an occupationally competent industry representative working at a higher level than the apprentice

### Internal Quality Assurance

AAOs will ensure the consistency and validity of their assessment decisions.

AAOs 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.

AAOs 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.

Internal quality assurance will be achieved by the AAO'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.

The IQA will investigate any assessment anomalies and risks and report these to the assessment organization.

AAOs will need to demonstrate their capability to deliver internal quality assurance. This includes, but is not limited to:

- managing the performance, training and professional development of assessors and IQAs including:
  - the EPA;

- the apprenticeship standard;
- grading criteria and marking schemes;
- examples of relevant evidence;
- putting in place a performance management process for assessors who do not meet the required standards;
- monitoring assessor practice and decisions;
- managing standardization and internal quality assurance activities and decisions;
- having in place a complaints and appeals procedure that is compliant with the EQA provider's requirements;
- providing comparability and consistency of assessment decisions;
- managing the improvement of quality of assessment practice;
- managing and assuring the quality of any assessment delivered by sub-contractors;
- providing regular risk-based reports of the internal quality assurance of assessment.

AAOs are responsible for the delivery of the assessments around the country. To ensure the consistency of the assessment process, AAOs will ensure that:

- all apprentices undertake an assessment that has been developed and verified as valid;
- 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;
- they will publish assessment arrangements and supporting guidance. The guidance will include the minimum standards for:
  - facilities for the delivery of assessments;
  - the security of assessment materials;
- AAOs must have policies to gather feedback from apprentices to inform reviews of assessment arrangements;
- they will undertake internal quality assurance activity to monitor the delivery of the assessments.

This will ensure that apprentices have a consistent experience undertaking the assessment across the country.

Any appeals in relation to the outcome of EPAs will be managed initially by the AAO and escalated to BIFM, as the external quality assurance organization, as appropriate.

Please refer to the "roles and responsibilities" section for details on assessor requirements.

### **External Quality Assurance**

External quality assurance for the Facilities Manager Level 4 apprenticeship will be undertaken by the Institute for Apprenticeships.

### **Implementation**

#### **Affordability**

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 minimizes time and adverse impact on the apprentice and employer.

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.

AAOs 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 maximized, and that employers

and apprentices have easy access to EPAs with comparatively little time spent on travel and associated costs.

The cost of the EPA represents no more than 20% of the total cost of delivering the apprenticeship.

***Professional recognition***

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.

On achievement of the full apprenticeship, they will have met the full requirements of the Associate grade of membership and they will have met the academic criteria for Member grade (2 years' FM experience and 3 years' management experience). Full eligibility details may be found at: [www.bifm.org.uk](http://www.bifm.org.uk).

Apprentices may be eligible for membership of other professional bodies during and on completion of the apprenticeship.

***Consistency***

Please refer to the "Independence" section for details as to how this will be achieved.

***Volume***

The forecast is for 200 starts in the first year.

**Appendix A****Components of the standards to be covered by the EPA**

The table below shows which aspects of the 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 effectiveness of the implementation of a property management plan and make recommendations for improvement including inclusive access	1 Property asset management	<ul style="list-style-type: none"> <li>• Manage property and fixed assets and implement building maintenance plans</li> <li>• Optimize the use of space</li> <li>• Evaluate the effectiveness of the implementation of a property management plan</li> </ul>	<ul style="list-style-type: none"> <li>• Monitor and control premises</li> </ul>
Monitor and report the extent to which FM compliance requirements are met including health, safety and sustainability	3 FM compliance	<ul style="list-style-type: none"> <li>• Meet FM compliance, risk and business continuity requirements</li> <li>• Analyse the extent to which compliance, Corporate Social Responsibility (CSR) and sustainability requirements are met</li> </ul>	<ul style="list-style-type: none"> <li>• Carry out risk assessments</li> </ul>

		<ul style="list-style-type: none"> <li>Develop a Business Continuity Plan (BCP)</li> </ul>	
Make viable recommendations for improvements to the use of information within an organization against Key Performance Indicators (KPIs)	4 FM management systems	<ul style="list-style-type: none"> <li>Use FM management systems to monitor, report and act on the performance and efficiency of properties, assets and services against FM Key Performance Indicators (KPIs)</li> <li>Analyse statistics</li> </ul>	<ul style="list-style-type: none"> <li>Collect data</li> <li>Maintain data security</li> </ul>
Develop proposals for improvements to financial performance and procurement in FM	8 Financial and procurement management	<ul style="list-style-type: none"> <li>Manage FM finances and procure FM goods and services, ensuring they are delivered within agreed budgets and make recommendations for innovation</li> <li>Analyse financial information</li> <li>Analyse the effectiveness of procurement practices</li> </ul>	<ul style="list-style-type: none"> <li>Develop operational plan and budget</li> <li>Manage 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)
The features of a building's whole lifecycle and their implications e.g. cost, resource and maintenance requirements	1 Property asset management	<ul style="list-style-type: none"> <li>Implications of property ownership</li> <li>Principles of building design</li> <li>Relocation requirements &amp; factors involved</li> </ul>	<ul style="list-style-type: none"> <li>Establishment &amp; management of registers for property &amp; fixed assets</li> <li>The features of building, fabric, structures and components and</li> </ul>

		<ul style="list-style-type: none"> <li>• Layout, flow management &amp; space planning techniques</li> <li>• Accessibility &amp; inclusion</li> </ul>	their implications for maintenance
FM compliance-related costs including the costs associated with addressing shortfalls identified through monitoring in FM compliance	3 FM compliance	<ul style="list-style-type: none"> <li>• Sustainability and corporate responsibility</li> <li>• The impact of FM on the environment</li> <li>• Principles of risk management</li> <li>• Business continuity planning</li> </ul>	<ul style="list-style-type: none"> <li>• Regulatory frameworks, health and safety, client requirements statutory legislation and FM industry best practice</li> </ul>
The characteristics of FM management information systems to collect, process, communicate and store information	4 FM management systems	<ul style="list-style-type: none"> <li>• FM data capture, analysis &amp; management techniques</li> <li>• Requirements of ISO 41001 (international standard)</li> </ul>	<ul style="list-style-type: none"> <li>• Types, capabilities and limitations of FM IT systems e.g. of building management services</li> </ul>
The factors to be taken into account when establishing and managing a budget and procuring goods or services	8 Financial and procurement management	<ul style="list-style-type: none"> <li>• Financial/budget/resource management &amp; reporting systems and processes &amp; techniques</li> </ul>	<ul style="list-style-type: none"> <li>• Accountability within delegated financial authorities</li> <li>• Organizational procurement policies and processes &amp; client objectives and requirements</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
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
Systematic approach	Approach work in a 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)
Ensure the delivery of FM services in accordance with organizational requirements	2 FM service delivery	<ul style="list-style-type: none"> <li>• Ensure the delivery of FM service provision to required standard</li> <li>• Identify opportunities for improvements</li> <li>• Identify and rectify FM service delivery problems</li> </ul>	<ul style="list-style-type: none"> <li>• Identify requirements</li> </ul>
Develop and monitor an FM delivery plan for properties, assets and/or services that supports an organizational FM strategy and which mitigates potential negative impacts	5 FM policy implementation and change management	<ul style="list-style-type: none"> <li>• Develop and implement delivery plans for the management of FM properties, assets and services and manage change</li> <li>• Identify operational impact of change</li> <li>• Develop plans to mitigate negative impacts</li> </ul>	<ul style="list-style-type: none"> <li>• Carry out activities ethically and sustainably</li> <li>• Manage expectations</li> </ul>
Develop plans to address a team's future development needs	7 People management in FM	<ul style="list-style-type: none"> <li>• Motivate, manage and develop FM teams to deliver operational objectives</li> <li>• Assess and plan for individuals' development needs</li> </ul>	<ul style="list-style-type: none"> <li>• Deploy assets</li> <li>• Comply with Human Resource (HR) requirements</li> </ul>

<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)
Organizational, client and customer service requirements in FM service delivery	2 FM service delivery	<ul style="list-style-type: none"> <li>• Principles of contract management</li> <li>• Problem solving techniques</li> <li>• Management of sub-contractors</li> </ul>	<ul style="list-style-type: none"> <li>• Prevention measures</li> <li>• Corrective actions</li> </ul>
An organization's strategy, business plan, objectives and purpose, its culture and values and the role of FM in delivering that purpose	5 FM policy implementation and change management	<ul style="list-style-type: none"> <li>• FM organizational and service requirements, targets &amp; objectives</li> <li>• Principles of project management</li> </ul>	<ul style="list-style-type: none"> <li>• Change management techniques</li> </ul>
The scope of leadership and management including workforce/resource planning techniques and their requirements (including legal requirements for equality)	7 People management in FM	<ul style="list-style-type: none"> <li>• The impact of change on people</li> <li>• Capability building, HR tools and techniques</li> </ul>	<ul style="list-style-type: none"> <li>• Ways of recording and tracking human resources capabilities</li> <li>• HR-related legislation affecting FM</li> </ul>

<b>Assessment method: Professional discussion</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
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 a orderly way

<b>Assessment method: Presentation</b>			
<b>Assessment task</b> Apprentices must make a presentation on the following:	<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 and implement FM quality management operational plans and procedures that align with the FM strategy and policies	6 Quality and stakeholder management in FM	<ul style="list-style-type: none"> <li>• Establish and manage day-to-day relationships with clients and other stakeholders to agreed quality standards</li> <li>• Develop and implement FM quality management operational plans</li> <li>• Recommend improvements to the quality of FM service provision</li> </ul>	<ul style="list-style-type: none"> <li>• Use appropriate stakeholder management methods</li> </ul>

<b>Assessment method: Presentation</b>			
<b>Assessment task</b> Apprentices must make a presentation on the following:	<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)
How FM quality policies contribute to the delivery of FM organizational strategy including stakeholder influence and potential impact	6 Quality and stakeholder management in FM	<ul style="list-style-type: none"> <li>• Quality management in FM</li> <li>• Principles of continuous improvement</li> <li>• Influencing techniques</li> </ul>	<ul style="list-style-type: none"> <li>• Client objectives, requirements &amp; value</li> <li>• Service Level Agreements (SLAs)</li> <li>• Survey &amp; benchmarking techniques</li> <li>• Uses of customer feedback</li> </ul>

<b>Assessment method: Presentation</b>	
<b>Behaviours</b>	<b>Behavioural descriptors</b>
Influencing	Anticipating and responding to others' needs and influencing them to enhance performance
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 a orderly way

**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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**Assessment organization**

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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 Facilities Manager (L4) through the presentation and professional discussion.

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

- 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.

EPA panel members (name)	EPA panel members (organization)
To be completed	To be completed

To be completed	To be completed
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Aspect of standard	Interview questions	Apprentice response & interview notes
<p>6 Develop and implement FM quality management operational plans (skill) Quality management in FM (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>2 Ensure the delivery of FM service provision to required standards and identify opportunities for improvement (skill) Problem solving techniques, prevention measures, corrective actions (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>5 Develop and implement delivery plans for the management of FM properties, assets and services and manage change (skill) FM organizational and service requirements, targets &amp; objectives (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>7 Assess and plan for individuals' development needs (skill) Capability building, HR tools and techniques (knowledge)</p> <p>To be assessed through the professional discussion</p>	<p>What were the outcomes of this?  How was your work received?</p> <p>What factors did you take into account?  On what did you base your conclusions?  What use did you make of academic learning in a practical way?  What were the outcomes of this?  How was your work received?</p>	

Behaviours	Interview questions	Apprentice response & interview notes
<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?  How were these mapped?  What did you do to solve a customer's problem?  How successful was this and how was it used?  Why was that?  What did/would you do to embed success into day-to-day-business?</p>	

<b>2 Influencing:</b> anticipating and responding to others' needs and influencing them to enhance performance	<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>	
<b>3 Collaboration:</b> Working in partnership with others for the common good	<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>	

**4 Innovation and quality:** Aiming for a higher level of excellence

Describe a time when you suggested an innovation or improvement

How did you spot the opportunity?

What factors did you take into account in deciding that it would be valuable and worthwhile?

How was the idea received and what factors did you take into account in promoting it?

**5 Strategic thinking:** Seeing the “bigger picture” to enable an organization to meet or exceed its strategic intentions

How do/would you go about anticipating market trends?

Describe a time when you identified developments within facilities management that might affect business strategy

What factors did/would you take into account in weighing up the implications of commercial imperatives?

**6 Ethics and integrity:** Working for the greater good and not sacrificing high standards for immediate gain or personal benefit

Describe how standards of social responsibility and sustainability can affect facilities management

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?

What impact might there be on facilities management if an organization were to behave in an unethical way?

	<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 project report, presentation and professional discussion**

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)**

<b>Level 4</b>	<b>Apprentices who fail may:</b>	<b>To achieve a pass (40% – 59%), apprentices must:</b>	<b>To achieve a merit (60% - 69%), apprentices must:</b>	<b>To achieve a distinction (70%+), apprentices must:</b>
	<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>Ensure the consistency of monitoring activity with the FM strategy</li> <li>Make practicable and viable recommendations for improvement</li> <li>Comply with all legal requirements including health, safety, sustainability and equality</li> <li>Carry out risk assessments in accordance with best practice</li> <li>Uses Key Performance Indicators (KPIs) to shape improvements to business efficiency</li> <li>Develop realistic operational plans and budgets</li> <li>Comply with organizational FM procurement practices</li> </ul>	<ul style="list-style-type: none"> <li>Analyse the application of the principles of building design in the effective maintenance of property and fixed assets</li> <li>Analyse the way in which FM regulatory, organizational and other compliance requirements affect their responsibilities</li> <li>Use a range of data to analyse the efficiency of properties, assets and services</li> <li>Address budget variances in line with the FM strategy</li> <li>Analyse the effectiveness of FM procurement practices and policies</li> </ul>	<ul style="list-style-type: none"> <li>Evaluate the effectiveness of the implementation of a property management plan and recommend improvements</li> <li>Assess the impact and likely cost of non-compliance</li> <li>Assimilate, analyse and interpret a wide range of data to justify conclusions of the performance and efficiency of properties, assets and services</li> <li>Develop feasible and viable proposals for improvements to FM financial performance</li> <li>Make financially and ethically sound recommendations for improvements to FM procurement practices, policies and processes</li> </ul>

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

<b>Level 4</b>	<b>Apprentices who fail may:</b>	<b>To achieve a pass (40% – 59%), apprentices must:</b>	<b>To achieve a merit (60% - 69%), apprentices must:</b>	<b>To achieve a distinction (70%+), apprentices must:</b>
	<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 FM quality management operational plans that align with the FM strategy and policies</li> <li>• Establish productive day-to-day working relationships with stakeholders</li> </ul>	<ul style="list-style-type: none"> <li>• Apply the principles of quality management to FM activities</li> <li>• Identify the needs of stakeholders</li> <li>• Use a range of stakeholder management techniques to manage stakeholders' expectations</li> </ul>	<ul style="list-style-type: none"> <li>• Evaluate the effectiveness of FM quality management operational plans and procedures</li> <li>• Identify the influence and power levels of internal and external stakeholders</li> <li>• Balance the needs of stakeholders with those of the FM function</li> </ul>

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

Level 4	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>Ensure the delivery of FM services to agreed standards</li> <li>Deliver those aspects of the FM strategy for which they are responsible to time and budget</li> <li>Comply with all legal requirements including health, safety, sustainability and equality</li> <li>Implement change project plans ethically and in a sustainable manner</li> <li>Motivate individuals and teams and provides support in times of change and stress</li> </ul>	<ul style="list-style-type: none"> <li>Resolve problems in FM service delivery in a way that satisfies client and organizational needs</li> <li>Monitor FM delivery plans in a way that mitigates potential negative impacts</li> <li>Identify the operational impact of changes and their likely consequences</li> <li>Deploy resources to maximize efficiency</li> </ul>	<ul style="list-style-type: none"> <li>Use their knowledge of trends in FM services and delivery models to anticipate and meet client needs</li> <li>Use a range of project and change management monitoring tools and techniques to deliver the FM delivery plan in a way that optimizes the use of resources</li> <li>Apply the principles of change management to ensure minimum disruption to business and client relationships during change</li> <li>Apply the principles of leadership and management to optimize FM team performance and develop its capability</li> </ul>

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

There are three components to the EPA:

1. FM work-based project (dissertation) (50% weighting);
2. presentation of the project report (20% weighting);
3. professional discussion with a panel based on the project report, portfolio and reflective log (30% 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 / 50
Presentation	x / 20
Professional discussion	x / 30
<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	50	20 – 29	30 – 34	35 - 50
Presentation	20	8 – 11	12 – 13	14 - 20

Professional discussion	30	12 – 17	18 – 20	21 - 30
<b>Total</b>	<b>x / 100</b>			

**Pass:** 40% - 59%

**Merit:** 60% - 69%

**Distinction:** 70% +