ASSOCIATE PROJECT MANAGER APPRENTICESHIP HANDBOOK

An overview and guide for
Apprentices and Employers
April 2024 | v1.4

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(INSIDE COVER)

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INTRODUCTION

Occupational Profile

Welcome to the CMI Qualification Specification document for the L4 Associate Project Manager (APM) occupational standard. This document has been developed to help you, as a potential apprentice or employer of an apprentice, to choose your endpoint assessment organisation and/or to answer any questions you may have regarding undertaking an apprenticeship.

This occupation is found in small, medium, and large organisations within the public, private and third sectors. Associate project managers work in all sectors such as government, retail, food and drink, infrastructure, education, charities, research, and banking. The working environment can vary from being in an office, on site, at client, and contractor's locations and working remotely.

The key responsibilities are to contribute to the successful delivery of a project, ensuring its scope and benefits are achieved as planned. They do this primarily by identifying, resourcing, scheduling, and monitoring the activities that need to happen in a certain sequence and timescale. They monitor the project objectives and milestones and adjust plans in accordance with evolving circumstances.

An employee in this occupation will be responsible for identifying, defining, and delivering some or all the aspects of a projects lifecycle within the limits set by the project manager. Associate project managers work on their own and in a range of team settings.

The duration of the apprenticeship is anticipated to be typically 18 months.

Qualification Details

IfATE Occupational Standard	Apprenticeship Qualification Title	Ofqual Qualification Reference Number
ST Code: ST0310/v1.4 Date Approved For Delivery: 22 April 2024 Latest version: v1.4 (dated 22/04/2024) Typical duration to Gateway (excluding EPA period): 18 months Maximum funding: £7000	CMI Level 4 Associate Project Manager End Point Assessment	610/3657/2

The qualification reference number is the number allocated to CMI by Ofqual as the regulator of qualifications, examinations and assessments in England, on approval of our recognition to undertake endpoint assessments for this occupational standard.

WHAT TO EXPECT

The Apprenticeship Journey
Your end to end apprenticeship journey is likely to be split into the following 5 stages:

Choosing Your Programme and University	See the [UCAS Apprenticeship](#) page for more information and/or to find possible apprenticeship opportunities within your area. Apprentices need to be currently working in a role that clearly supports projects (see notes above regarding the occupational standard). Apprentices need to live and/or work in England to be eligible for their employer to utilise their levy funding.
Completing The On-Programme Assignments, Modules, and Activities	This is when apprentices develop the knowledge, skills, and behaviours (KSBs) of the occupational standard.As well as their English and mathematics level 2, if required. Towards the end of their on-programme activities, apprentices will need to have completed their portfolio of evidence and have undertaken a work-based project. The typical duration for this stage of the journey is 18 months.
Passing Through Gateway	Gateway is the point of the journey where apprentices move from learning to demonstrating the knowledge, skills, and behaviours (KSBs) within the occupational standard. Before an apprentice is able to undertake their end point assessment (EPA), their employer must confirm that the apprentice is working at or above the level of the occupational standard and their training provider has to confirm that the apprentice has a level 2 qualification for English and mathematics. At Gateway, apprentices must submit: ● A portfolio of evidence to underpin the professional discussion ● The project title and scope which will be agreed between the employer and the EPAO at the gateway (The agreed project will present a typical business task, appropriate for demonstrating the skills and knowledge on the standard.)
Undertaking Your End Point Assessment (EPA)	End Point Assessment (EPA) is the final stage of the actual apprenticeship journey and is where the apprentice will be tested by an independent apprenticeship assessor to determine whether they are able to demonstrate the knowledge, skills, and behaviours within the occupational standard. - **Assessment Method 1**: Written project report with presentation and questioning. - **Assessment Method 2:** Professional Discussion underpinned by a portfolio of evidence. - Typical duration of end point assessment: 5 months culminating in a live assessment activity lasting no more than 2.5 hours

Your Options after EPA	Ongoing personal and professional development is an essential skill and/or requirement of every manager and leader.
	CMI, as a professional body, is committed to turning accidental managers into conscious leaders and supports its members in their ongoing continued professional development. CMI is the only chartered body that can award Chartered Manager and its Management Diagnostics provides a valuable self-assessment tool that enables its members to understand what good looks like and know how to develop the skills employers need now and in the future.
	Other technical education options following end point assessment include completing another apprenticeship (either in management and leadership or your industry specialism), or considering a specialism higher technical qualification.

END POINT ASSESSMENT

What is an endpoint assessment and why is it needed?

End point assessment is the terminology used by IfATE to describe the period post-Gateway and put simply is what the apprentice needs to do at the end of their apprenticeship programme. Its aim is to test the apprentice's competence in the knowledge, skills and behaviours (KSBs) within the L4 Associate Project Manager (APM) assessment plan.

End point assessment usually requires the apprentice to complete a number of different activities, called assessment methods, and is carried out by an End Point Assessment Organisation, such as CMI, who are independent to the Training Provider (University) and Employer.

The end point assessment for the L4 Associate Project Manager (APM) occupational standard is synoptic (meaning that it has been designed to test all of the knowledge, skills and behaviours within IfATE's occupational standard ST0310 and seeks to discern the breadth and depth of topics/area covered in this standard.) It has 2 (two) assessment methods:

- **Assessment method 1: Written project with report with presentation and questioning**
- **Assessment method 2: Professional discussion, underpinned by a portfolio of evidence**

Apprentices need to note that before they are able to do their end point assessment, their chosen University or Higher Education Institution (Training Provider) has to confirm that all of the on-programme activities have been completed. This is done as part of their gateway requirements, and is also when they need to confirm that the apprentice has taken part in a work-based project.

Things you need to know about creating a portfolio of evidence

Whilst it is not assessed, the portfolio of evidence is used to underpin the professional discussion assessment. Apprentices are required to complete their portfolio of evidence whilst on-programme which is submitted as part of the Gateway requirements.

Please see below some useful hints and tips on gathering evidence for an end point assessment portfolio
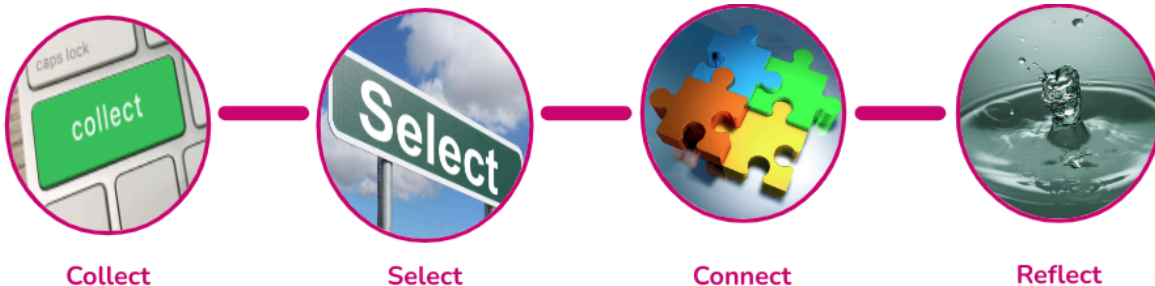
Collect	Select	Connect	Reflect
CMI recommends that apprentices collect evidence for their portfolio from the start of the apprenticeship journey	Apprentices should check that the evidence they have collected does showcase their best work and focuses on their management and leadership skills	Apprentices need to ensure that it is easy for the CMI Independent Assessor to find and see exactly what KSBs the evidence is mapped to	Apprentices need to know what evidence is being submitted and ensure that they can explain what they have learned/done

The portfolio of evidence needs to cover all of the relevant KSBs within the [L4 Associate Project Manager (APM) assessment plan](#) and should predominantly be real work-based examples that have been validated by a third-party, such as their line manager or using a witness testimony. The image below explains the importance of triangulating evidence used within a portfolio of evidence:

Validation

Witness testimony or observation that confirms what I did, my role and the KSBs seen

Activity / Example

Work-based example clearly shows what I did and my role in this chosen activity

Contextualisation

Introduction summarising what I learned, what evidence I am providing and the areas I am evidencing

CMI Chartered Management Institute
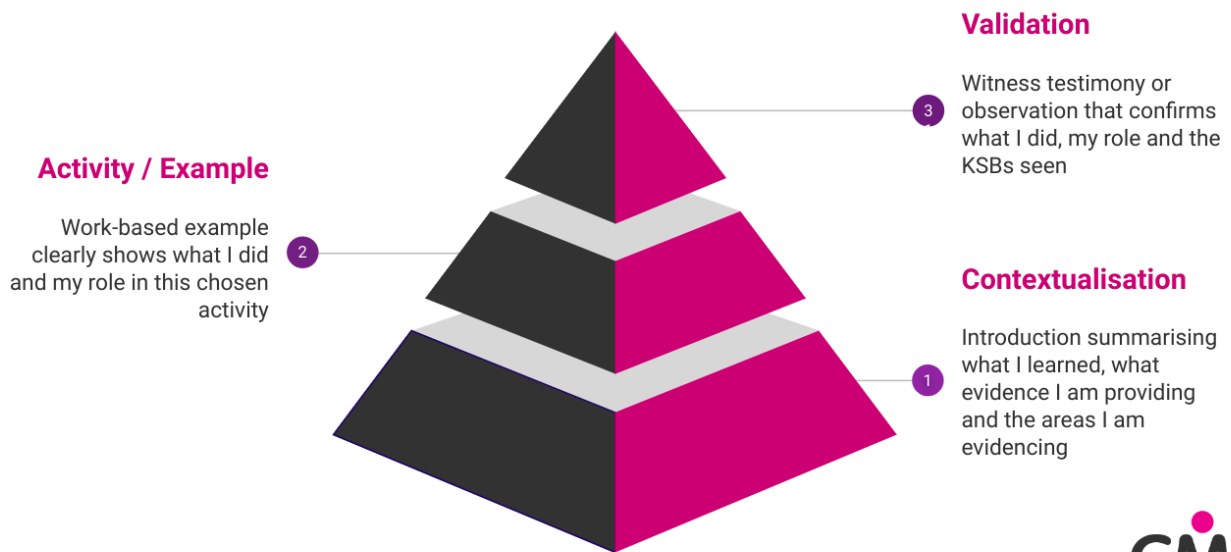
This is why CMI recommends that as an apprentice you:
- Take a qualitative, as opposed to a quantitative, approach when gathering evidence for your portfolio. Each piece of evidence needs to focus on your role and activities as a manager or leader, and will typically cover multiple KSBs.
- Showcase your 'best' work, including any key achievements whilst on-programme, and/or from within your day to day activities.
- Include a separate evidence locator document within your portfolio that clearly identifies which KSBs each piece of evidence is mapped to. (NOTE: CMI has a template that they share with Training Providers, for apprentices to use as part of their prompting notes within the live assessment activity and to ensure all of the KSBs have been evidenced.)

Things you need to know about Assessment Method 1 - Written project report with presentation and questioning

The apprentice is required:
1. To have identified a suitable project that has a real business benefit, relates to their role and has been completed prior to gateway.
2. To write a 500-word scoping document which is submitted at gateway and must be approved by CMI, as the EPAO.

Once gateway has been approved, the apprentice will then have up to 12 weeks to:
- Write their 3500-word project report
- Include a mapping document in the appendix, to show how the report meets the KSBs
- Write the 20-minute presentation

The chosen project report requires the apprentice to complete a significant and defined piece of work that has a real business application and benefit. The apprentice's project report document and presentation both need to be submitted to CMI within 12 weeks of Gateway being approved.

The Independent Assessor will then have at least 2 weeks to review this document and the presentation before the live assessment can take place.

At the live assessment, the apprentice will deliver a 20-minute presentation which will be followed by a 40 minute question/answer session. The presentation is expected to cover:

- an overview of the project
- the project scope
- how this scope was delivered (including schedule, milestones and key resources)
- summary of delivery tasks undertaken by the apprentice
- project outcomes

During the question and answer session, the apprentice will be asked at least **6 (SIX) questions**, with 1 question from each of the following points that need to be covered within the presentation:

- Project management tools and techniques,
- Managing information
- Managing Stakeholders
- Research, analysis and evaluation

Things you need to know about Assessment Method 2 - Professional discussion underpinned by a portfolio of evidence

As already mentioned, the evidence within the apprentice's portfolio and that underpins the professional discussion, needs to have been gathered whilst on-programme and submitted at Gateway.

The apprentice is required to participate in a 60-minute professional discussion where they will talk about the activities and evidence that they submitted in their portfolio. During the professional discussion the apprentice **will be asked at least 6 (SIX)** open-ended and competency-based questions that are designed to prompt discussion and draw out the relevant knowledge, skills and behaviours for this assessment method. The professional discussion will also be based on the following grading descriptor topics
- Business requirements and objectives
- Regulations and legislation
- Project management tools and techniques
- Managing information
- Managing stakeholders
- Research and analysis
- Evaluation
 Follow up questions can be asked to prompt further discussion and to seek clarification.

Please note that:
- A professional discussion is not simply a question and answer session. It is a two-way conversation between the apprentice and their CMI IAA.
- CMI recommends the apprentice has access to a copy of their portfolio throughout the professional discussion, as well as some prepared notes to refer to as needed and to act as prompts.

Follow up questions are also likely to be used to seek clarification.

Overall grading decision

The Apprentice is required to successfully complete and pass BOTH assessment methods and their overall grade is based on the following criteria:

- **To achieve a pass overall, the apprentice must achieve at least a pass in BOTH assessment methods and have met all of the pass descriptors.**
- **To achieve a distinction overall, the apprentice must achieve a distinction in BOTH assessment methods and have met all of the pass and all of the distinction descriptors.**

The overall grading result will normally be communicated to the Training Provider within 15 working days of the Apprentice's live assessment.

If the apprentice has not met all of the pass descriptors in either of the assessment methods they will initially be recorded as **REFERRED** and will be offered the opportunity to take a re-sit or a re-take.

Please note that:
- All referral results are communicated to the Employer, Apprentice, and Training Provider
- Apprentices will be required to resit or retake only the assessment method(s) they have been referred on.
- If the apprentice fails the project report assessment method, they will be required to amend the project report and presentation in line with the independent assessor's feedback. The apprentice will have up to **3 weeks** to rework and submit the amended project report and presentation. The independent apprenticeship assessor will then have **2 weeks** to review the project report and presentation before the live assessment date.
- Resits and retakes are capped at an overall grade of PASS, unless CMI as the EPAO determines there are exceptional circumstances requiring the resit or retake.

Further Information

As mentioned above, where an apprentice has not successfully evidenced any of the criteria required within an assessment method this will initially be notified as a referral and CMI will send further information to the Training Provider detailing the assessment method that needs to be resat/retaken.

The difference between a resit and a retake is that:
A resit means that the apprentice did not quite meet the knowledge, skill and/or behaviour advised within the CMI feedback report. This typically means that the apprentice may need to find some additional evidence for their portfolio, and/or adjust their work-based project report/presentation before attending a further live assessment activity.

A re-take means that there are significant gaps in the knowledge, skills and behaviours and it is recommended that the apprentice undertakes further learning before another assessment is taken.

Apprentices who achieve a pass grade cannot ask to re-sit/re-take their end point assessment simply to achieve a higher grade.

All policies relating to:

- Resits and Retakes.
- Appeals.
- Reasonable Adjustment Requests.
- Recognition of Prior Learning (RPL).

Can be found on the CMI Policy page of our website **here**

APPENDIX 1 - Glossary of Key Terms

Key Word/Term	Definition and/or Explanation
Assessment Component	The different activities that an apprentice has to complete for each assessment method. Typically these components are assessed holistically to determine one overall grading decision.
Assessment Method	The actual assessment activities that an apprentice needs to complete and pass as part of their endpoint assessment. Most of the newer assessment plans have 2-3 assessment methods.
Assessment Plan	The document that is published by IfATE (under Crown Copyright) that sets out what needs to be done when testing the competence of an apprentice for that particular standard.
Distinct	Recognisably different in nature from something else of a similar type. This phrase is often used to describe either the type of evidence that has been submitted within a portfolio, and/or the different assessment methods.
End Point Assessment (EPA)	Rigorous robust and independent assessment of an apprentice at the end of training to test that the apprentice can perform in the occupation they have been trained in and can demonstrate the knowledge, skills and behaviours (KSBs) set out in the occupational standard
End-point assessment organisation (EPAO)	An organisation approved to deliver end-point assessment for a particular apprenticeship standard; EPAOs must be on the register of end-point assessment organisations
Education and Skills Funding Agency (ESFA)	The Education and Skills Funding Agency is an executive agency of the government of the United Kingdom, sponsored by the Department for Education.
Gateway	The stage of the apprenticeship where it is agreed by the Employer, Training Provider and Apprentice that the Apprentice has the knowledge, skills and behaviours required in the Apprenticeship Standard and can prove this at EPA
Grading Decision	This is the final overall grade for an endpoint assessment. IAAs are required to check the overall grade within the assessment sheet before uploading it to CMI Assess ready for Internal Quality Assurance/release of results to the TP/Apprentice.
Holistic (or Synoptic) Assessment	Terminology used to identify an assessment method or assessment activity which has a number of components that are assessed as one overall decision.
CMI Independent Assessor (IAA)	Terminology used by CMI. The assessor independent from the on-programme delivery of the Apprenticeship who assesses the competence of the apprentice during the endpoint assessment activities set out in the published Assessment Plan
Interview	IfATE assessment method - usually requires a number of competency based questions to be asked.
Institute for Apprenticeships and Technical Education (IfATE)	IfATE (sometimes referred to as 'The Institute') works with employers to develop, approve, review and revise apprenticeships and technical qualifications within England.
Knowledge, skills and behaviours (KSBs)	What is needed to competently undertake the duties required for an occupational Standard **Knowledge:** What the apprentice needs to know and/or understand to complete their apprenticeship successfully. The information, technical detail, and

	'know-how' that someone needs to have and understand to successfully carry out the duties. Some knowledge will be occupation-specific, whereas some may be more generic. **Skills:** What an apprentice needs to be able to do. The practical application of knowledge needed to successfully undertake the duties. They are learnt through training or experience. **Behaviours**: Apprentices need to demonstrate how they have developed and exhibited the behaviours within the occupational standard within the workplace. Whilst they may be innate or intrinsic they can also be learned so are sometimes considered to be an additional subset of skills.
Live Assessment Activity (LAD)	The point at which the live assessment methods are carried out in front of an Independent Apprenticeship Assessor, such as the interview and project presentation
Occupational (Apprenticeship) Standard	Written and developed by the relevant employer trailblazer group(s) and include the specific Knowledge, Skills and Behaviours (KSBs) needed for specific occupations. The document acts as the basis for apprenticeship standards and T-levels, and aims to put employers in the driving seat for ensuring apprentices are learning skills that are relevant to the workplace. The newer standards also include the key duties expected of an apprentice by the time they complete their programme, as well as the occupational profile, expected duration, and grading boundary.
Occupational Profile	This is an overview of the occupation and describes the sector or industries the occupation is typically found in; the broad purpose of the occupation; and what an employee in the occupation would typically do.
On-programme activities	Activities carried out during the time of the apprenticeship supported by the training provider and employer through training and resources
Presentation	IfATE assessment method - presented as part of the live assessment. Typically the presentation is on a set topic or based on a project/activity.
Portfolio of Evidence	Is a collection of pieces of evidence, gathered together on-programme, that is used as the underpinning basis of an end-point assessment method.
Question & Answer Session	IfATE assessment method - typically used following a presentation to confirm the assessors understanding of certain KSBs and/or to stretch to a distinction.
Referral/Referred	CMI terminology used to indicate that an apprentice has not met all of the KSBs within an assessment method. CMI will need to advise if the referral requires a resit or retake.
Resit	IfATE terminology used to indicate that an apprentice did not meet all of the KSBs for a particular assessment method or KSB group. Typically a resit will not require the apprentice to undertake further learning so can be completed within a few weeks of the referral notification.
Result	Final grading decision after it has been through our internal quality assurance process. This result is advised to the TP and Apprentice plus sent to ESFA/Ofqual as part of our reporting requirements.
Retake	IfATE terminology used to indicate that an apprentice did not meet a number of the KSBs within an assessment method. Typically a retake requires the apprentice to undertake further learning before undertaking their endpoint assessment again.
Witness Testimony	Third party validation that confirms what the apprentice did, how they did it , and what KSBs they consider were demonstrated during the activity.

Mapping of knowledge, skills and behaviours (KSBs) for **Assessment Method 1 - Written** project report with presentation and questioning.

KSBs	Knowledge	Skills	Behaviours
Project management tools and techniques K4 K5 K19 K21 K22 K24 S1 S25 S26	Techniques used to understand the project context, such as PESTLE (political, economic, social, technological, legal, and environmental), SWOT (strength, weakness, opportunities, threats) or VUCA (velocity, uncertainty, complexity, ambiguity). (K4)	Use project monitoring and reporting techniques to track, interpret and report on performance. (S1)	None
	The need and benefit of the project governance structure, requirements, and process and the impact on their role. (K5)		
	Configuration management and change control. (K19)	Use configuration management and change control to schedule and maintain projects. (S25)	
	Project scheduling and maintenance, including critical path analysis. (K21)	Manages resources through the project lifecycle. (S26)	
	Allocation and management of resources throughout the project life cycle. (K22)		
	Procurement strategies and processes that are both ethical and sustainable. (K24)		
Managing information K2 K10 K12 K18 K30 S12 S14 S16 S17 S21 B3	The importance of alignment between the project and organisational objectives. (K2)	Prepare, monitor, and schedule activities that contribute to the delivery of the overall project schedule and objectives. (S12)	Has accountability and ownership of their tasks and workload. (B3)
	Approaches to the maintenance of a business case and the management of the benefits which will be achieved upon the successful delivery of the project. (K10)	Identify and monitor project risks and issues; and plan and implement responses to them. (S14)	
	Methods used to define, record, integrate, deliver, and manage scope. (K12)	Use an organisation's continual improvement process including lessons learned to improve performance. (S16)	
	How and when to apply different estimating methods. (K18)	Support the preparation or maintenance of a resource management plan for project activities. (S17)	

	Technology and software used in the performance of project management activities. (K30)	Work within the approved project budget. (S21)	
Managing stakeholders K14 S6 B2	Communication techniques and approaches to interact with stakeholders to meet their requirements. (K14)	Communicate and support the project vision, to ensure buy-in to the project objectives. (S6)	Works collaboratively and builds strong relationships with others across the organisation and external stakeholders. (B2)
Research, analysis and evaluation K26 K28 S7 S9 S11	Principles for evaluating project success, including how lessons learned are captured and can impact future project delivery. (K26)	Collate and analyse information and provide input to support negotiations relating to project objectives. (S7)	None
	The impact of project objectives and how to respond to challenges around sustainability and the UK Government's policy to achieve net carbon zero. (K28)	Review and provide feedback on a project business case to ensure the project remains valid. (S9)	
		Evaluate an integrated project management plan to provide recommendations on areas for improvement. (S11)	

Mapping of knowledge, skills and behaviours (KSBs) for **Assessment Method 2 – Professional discussion underpinned by a portfolio of evidence.**

KSBs	Knowledge	Skills	Behaviour
Business requirements and objectives K1 K9 S20 B5	The differences between projects and business as usual. (K1)	Provide underpinning data to support the written submission to be taken through the governance process. (S20)	Seeks learning opportunities and continuous professional development. (B5)
	Importance, content, and purpose of a business case. (K9)		
Regulation and legislation K27 S23	Relevant regulations and legislation such as data protection, and how they impact on their role. (K27)	Apply relevant legislation, regulations, codes of practice, and ethical guidance where appropriate to their work. (S23)	None
Project management tools and techniques K3 K6 K7 K8 K11 K16 K23 K25 K29 S4 S24	The interdependencies between project, programme, and portfolio management. (K3)	Resolve conflict as and when required with stakeholders within limits of responsibility. (S4)	None
	The differences and comparative	Use data to inform	

	benefits between functional, matrix and project structures. (K6)	decisions on actions to take to mitigate risks on project. (S24)	
	Different roles and responsibilities within a project environment. (K7)		
	The differences and comparative benefits between linear, iterative and hybrid life cycle approaches. (K8)		
	The purpose, format, and significance of the project management plan. (K11)		
	Techniques for managing conflict and negotiation. (K16)		
	Principles of project risk and issue management. (K23)		
	The role and purpose of quality requirements, planning and control in a project environment. (K25)		
	Principles of conducting project management activities which are ethical and inclusive. (K29)		
Managing information K15 K31 S10 S15 S19 S22	The use of information management. (K15)	Apply change control processes to support the management of project scope. (S10)	None
	Presentation tools and techniques. (K31)	Deliver a Quality Management Plan which contributes to quality control processes. (S15)	
		Use digital tools and software to meet project objectives for example research, collaboration, presentations, and resolution of problems. (S19)	
		Ensure that integrated schedules support critical path analysis, interface management, resource forecasting and risk management. (S22)	
Managing	The identification, analysis, and	Manage and engage	Works flexibly and adapts

stakeholders **K13 K17** **S2 S3 S5 S18** **B1 B4**	management of stakeholders. (K13)	with stakeholders. (S2)	to circumstances. (B1)
	Techniques for working collaboratively within a team and with stakeholders. (K17)	Influence and negotiate with others to create a positive outcome for the project. (S3)	
		Adapt communications to different stakeholders. (S5)	Operates professionally with integrity and confidentiality. (B4)
		Work with stakeholders to deliver the project. (S18)	
Research, analysis and evaluation **K20** **S8 S13**	The principles of earned value management (EVM) and the interpretation of EVM information. (K20)	Monitor and analyse project budgets. (S8)	None
		Evaluate and make recommendations on the risk management plan to threats to delivery and recommend solutions. (S13)	

APPENDIX 3 - Copy of Grading Descriptors

The following grading descriptor groups and relevant KSBs are for **Assessment Method 1 - Written project report with presentation and questioning:**

Fail: Does not meet the pass criteria.

KSB Group	Pass Descriptors The apprentice must demonstrate all of the pass descriptors below	Distinction Descriptors The apprentice must demonstrate all of the distinction descriptors below
Project management tools and techniques K4 K5 K19 K21 K22 K24 S1 S25 S26	Explains how they use project monitoring and techniques to understand the project context and to track, interpret and report on performance. (K4, S1)	Justifies the techniques they use to track, interpret, and report on project performance and how they have supported successful delivery of the project within its context. (K4, S1)
	Describes how they use configuration management and change control to schedule and maintain projects and manage resources through the project lifecycle. (K19, K21, K22, S25, S26)	
	Describes the need and benefit of the governance structure and ethical and sustainable procurement processes and how they impact on their role. (K5, K24)	
Managing information K6 S17 S21 B32 K10 K12 K18 K30 S12 S14 S1	Summarises how they schedule, prepare and monitor activities that contribute to the overall objectives, and the importance of aligning project and organisational objectives. (K2, S12)	Evaluates the approaches they take to maintain a business case, what benefits they achieve and how they ensure successful delivery of a project. (K10)
	Describes the approaches taken to maintain a business case and how they manage the benefits which will be achieved through successful delivery of the project. (K10)	
	Describes technology, software, and methods they use to define, record, integrate, deliver, and manage the scope of the project and how they use them to identify and monitor risks and issues planning and implementing responses to them. (K12, K30, S14)	
	Explains how and when to apply estimating methods to work within the approved project budget taking ownership and accountability for this task. (K18, S21, B3)	
	Explains how they used continual improvement and lessons learned from projects to support the preparation or maintenance of a Resource Management Plan to drive project activities. (S16, S17)	Explains the importance of continual improvement and the use of lessons learnt from projects and recommend how they would use these to drive future project activities. (S16, S17)

Managing stakeholders K14 S6 B2	Describes the communication techniques they use to support the project vision and ensure buy-in to objectives, through collaborating and maintaining stakeholder relationships' (K14, S6, B2).	N/A
Research, analysis and evaluation K26 K28 S7 S9 S11	Describes the principles they use to evaluate project success and an integrated Project Management Plan ensuring that lessons learned are captured and how they may impact on future projects, including how these are used to recommend areas for improvement. (K26, S11)	Critically evaluates the principles they use to evaluate project success and the impact of the objectives on sustainability and how these support recommendations for improvement areas on future projects. (K26, K28, S11)
	Explains how they would evaluate the impact of project objectives and respond to challenges around sustainability and the UK Government's policy to achieve net carbon zero. (K28)	
	Demonstrates how they collate and analyse information to support negotiations on project objectives and provide feedback on a project business case to ensure the project remains valid. (S7, S9)	

The following grading descriptors and relevant KSBs are for **Assessment Method 2 -Professional discussion underpinned by a portfolio of evidence:**

Fail: Does not meet the pass criteria

KSB Group	Pass Descriptors The apprentice must demonstrate all of the pass descriptors below	Distinction Descriptors The apprentice must demonstrate all of the distinction descriptors below
Business requirements and objectives K1 K9 S20 B5	Describes the differences between projects and business as usual including how they seek learning and professional development opportunities in both settings. (K1, B5)	N/A
	Explains the importance of the content and purpose of a business case and how underpinning data is used to support the written submission through the governance process. (K9, S20)	
Regulation and legislation K27 S23	Explains the regulatory and legislative requirements which impact on their role and how they apply them to the projects they are delivering. (K27, S23)	N/A
Project management tools and techniques K3 K6 K7 K8 K11 K16 K23 K25 K29 S4 S24	Describes the interdependencies between project, programme, and portfolio management and how these influence the purpose, format, and significance of the project management plan. (K3, K11)	Analyses project risk and issue management principles and the impact they may have on the successful delivery of a project. (K23)
	Explains the differences and comparative benefits between functional, matrix and project structures, how they interact with the principles of project risk and issue management and how data is used to inform actions to take to mitigate risks on the project. (K6, K23, S24)	
	Outlines the different roles and responsibilities in a project and what techniques they use to manage conflict and negotiation within their area of responsibility. (K7, K16, S4)	
	Describes the differences and comparative benefits between linear, iterative and hybrid life cycle approaches. (K8)	
	Discusses the role and purpose of quality requirements, planning and control in a project environment and the principles of conducting project management activities which are ethical and inclusive. (K25, K29)	Justifies how project management activities ensure that all activities undertaken are ethical and inclusive.

		(K29)
Managing information K15 K31 S10 S15 S19 S22	Discuss information management and how it is used to ensure that integrated schedules support critical path analysis, interface management, resource forecasting and risk management. (K15, S22)	Justifies why they have applied change control processes and how these supported the management of project scope. (S10)
	Describe the presentation techniques they use and explain how they apply change control processes to support the management of project scope and deliver quality plans using digital tools and software to meet the project objectives. (K31, S10, S15, S19)	
Managing stakeholders K13 K17 S2 S3 S5 S18 B1 B4	Describes how they identify, analyse, and manage stakeholders and adapt their communications to work flexibly to changing circumstances. (K13, S5, B1)	Evaluates the communications they use with stakeholders to influence, negotiate, and resolve conflict to create a positive outcome for the project and how they would adapt their style to suit the audience. (S5, S18, B1)
	Outlines the techniques used for working collaboratively, managing, and engaging with stakeholders and how they use these to influence and negotiate to create a positive outcome for the project. (K17, S2, S3,)	
	Demonstrates how they operate professionally in order to work with stakeholders to deliver the project. (S18, B4)	
Research, analysis and evaluation K20 S8 S13	Describes the principles of earned value management (EVM) and the interpretation of EVM information, and how this is used to monitor and analyse budgets. (K20, S8)	Evaluates the principles of earned value management (EVM) they have used, and the recommendations they have made on how this is used to monitor and analyse budgets. (K20, S8)
	Explains how they evaluate the Risk Management Plan to address threats to delivery and solutions they have recommended. (S13)	

APPENDIX 4 - CMI Command Verbs

Below is a list of the CMI command verbs that apprentices may find useful and/or want to use to ensure they are fully meeting the relevant assessment criteria.

Command Verb	Definition
Analyse	Break the subject or complex situation(s) into separate parts and examine each part in detail; identify the main issues and show how the main ideas are related to practice and why they are important. Reference to current research or theory may support the analysis.
Assess	Provide a reasoned judgement or rationale of the standard, quality, value or importance of something, informed by relevant facts/rationale.
Consider	Take (something) into account (i.e. different ideas, perspectives, theories, evidence) when making a judgement
Create	Originate or produce a solution to a problem.
Define	Show or state clearly and accurately.
Develop	Elaborate, expand or progress an idea from a starting point, building upon given information.
Evaluate	Consider the strengths and weaknesses, arguments for and against and/or similarities and differences. The writer should then judge the evidence from the different perspectives and make a valid conclusion or reasoned judgement. Apply current research or theories to support the evaluation when applicable.
Examine	Inspect (something) thoroughly in order to determine its nature or condition.
Explain	Make something clear to someone by describing or revealing relevant information in more detail.
Explore	Go through the topic/issue thoroughly looking at all areas that affect the topic/issue.
Formulate	To devise or develop an idea or concept in a concise and systematic way.
Identify	Ascertain the origin, nature or definitive characteristics of something.
Outline	A general description/broad account/summary of something showing essential features/outline the case briefly but not the detail.
Recommend	Put forward proposals, an alternative or suggestion(s) supported by a clear rationale appropriate to the situation/context.
Reflect	Consciously contemplate, appraise or give balanced consideration to an action or issue.
Review	To examine, survey, reconsider a subject, theory or item.
Specify	Identify or state a fact or requirement clearly and precisely in detail.
Use	The action of using something for a particular purpose.

APPENDIX 5 - Version History

Version	Reason for change	Date amended
1.0	Document development and approval	23/04/2024
1.1	Document amended.	30/09/2024