

# End-point assessment plan for **Procurement & Supply** **Assistant** apprenticeship standard

Apprenticeship standard reference number	Apprenticeship standard level	Integrated end-point assessment
ST0810	3	No

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## Introduction and overview

This document sets out the requirements for end-point assessment (EPA) for the Procurement & Supply Assistant apprenticeship standard. It is for end-point assessment organisations (EPAOs) who need to

know how EPA for this apprenticeship must operate. It will also be of interest to Procurement & Supply Assistant apprentices, their employers and training providers.

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

The EPA period should only start, and the EPA be arranged, once the employer is satisfied that the apprentice is deemed to be consistently working at or above the level set out in the occupational standard, all of the pre-requisite gateway requirements for EPA have been met and can be evidenced to an EPAO.

As a gateway requirement and prior to taking the EPA, apprentices must achieve all approved qualifications mandated in the Procurement & Supply Assistant standard.

These are:

- Advanced Certificate in Procurement & Supply Operations

For level 3 apprenticeships and above apprentices without English and mathematics at level 2 must achieve level 2 prior to taking their EPA.

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

The EPA consists of 2 discrete assessment methods.

The individual assessment methods will have the following grades:

**Assessment method 1:** Work-based project followed by a presentation with questions and answers

- Fail
- Pass
- Distinction

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

- Fail
- Pass
- Distinction

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

- Fail
- Pass
- Distinction

## EPA summary table

<b>On-programme</b> (typically 18 months)	<p>Training to develop the occupation standard's knowledge, skills and behaviours (KSBs) of the occupational standard.</p> <p>Training towards mandated qualifications,</p> <p>Training towards L2 English and mathematics (if not already achieved),</p> <p>Compiling a portfolio of evidence,</p>
<b>End-point assessment gateway</b>	<p>Employer is satisfied the apprentice is consistently working at, or above, the level of the occupational standard.</p> <p>Apprentices must achieve the following approved qualifications mandated in the occupational standard:</p> <ul style="list-style-type: none"> <li>• Advanced Certificate in Procurement and Supply Operations</li> <li>• English and mathematics Level 2</li> </ul> <p>Apprentices must submit:</p> <ul style="list-style-type: none"> <li>• A portfolio of evidence</li> <li>• The EPAO should sign-off the project title, at the gateway, to confirm its suitability prior to the project commencing</li> </ul>
<b>End-point assessment</b> (which will typically take 6 months)	<p>Assessment method 1: Work-based project followed by a presentation with questions and answers With the following grades:</p> <ul style="list-style-type: none"> <li>· Fail</li> <li>· Pass</li> <li>· Distinction</li> </ul> <p>Assessment method 2: Interview underpinned by a portfolio of evidence</p> <p>With the following grades:</p> <ul style="list-style-type: none"> <li>· Fail</li> <li>· Pass</li> <li>· Distinction</li> </ul>
<b>Professional recognition</b>	<p>Aligns with recognition by:</p> <p>Chartered Institute of Procurement and Supply</p>

## Length of end-point assessment period

The EPA will be completed within an EPA period lasting typically of 6 month(s), after the EPA gateway. Any supporting material which underpins an EPA assessment method should be submitted at the gateway at the start of the EPA period. The portfolio of evidence will be submitted at the gateway.

## Order of assessment methods

The assessment methods can be delivered in any order.

## Gateway

The EPA period should only start once the employer is satisfied that the apprentice is consistently working at or above the level set out in the occupational standard, that is to say they are deemed to have achieved occupational competence. In making this decision, the employer may take advice from the apprentice's training provider(s), but the decision must ultimately be made solely by the employer.

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

English and mathematics at level 2.

For those with an education, health and care plan or a legacy statement the apprenticeships English and mathematics minimum requirement is Entry Level 3 and British Sign Language qualification are an alternative to English qualifications for whom this is their primary language.

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

- Advanced Certificate in Procurement & Supply Operations

For work-based project followed by a presentation with questions and answers, the apprentice will be required to submit:

- The apprentice will scope out and provide a brief summary of what the project will cover and will submit this to the EPAO at the gateway. This should demonstrate that the work-based project will provide sufficient opportunity for the KSBs to be met. The brief summary is not assessed and will typically be no longer than 500 words.
- The brief summary needs to outline the project plan, including high level implementation steps and associated timeframes, as well as the date the work-based project has to be submitted to the independent assessor, taking into account the deadlines stipulated within this end-point assessment plan.
- The EPAO will sign off the project title in consultation with the employer at the gateway.

For the interview underpinned by a portfolio of evidence, the apprentice will be required to submit:

- A portfolio of evidence.

The portfolio of evidence requirements are as follows:

- The apprentice will have prepared a portfolio of evidence during the on-programme phase to support the interview, questions and answer.
- The format and structure of the portfolio must be agreed between the employer and apprentice and will be presented electronically.
- The portfolio of evidence will be submitted to the EPAO at the gateway.
- Reflective accounts and self-evaluation cannot be included as evidence.
- The portfolio should contain written accounts of activities that have been completed and referenced against the knowledge, skills and behaviours, supported by appropriate evidence, such as video/audio extracts (these should be a maximum of 5 minutes in length); written statements; project plans; reports; minutes; observation reports; presentations (any employer contributions should focus only direct observation of evidence rather than opinions); feedback

from managers, supervisors or peers; papers or reports written by the apprentices; performance reviews. Other evidence sources are allowable.

- The content must be sufficient to evidence the apprentice can apply the knowledge, skills and behaviours required as mapped to assessment method 2 (interview). There must be at least one piece of evidence relating to each knowledge, skill and behaviour mapped to assessment method 2. One piece of evidence can be referenced against more than one knowledge, skill or behavioural requirement. It is expected that it will typically contain 15 discrete pieces of evidence.
- The evidence provided must be valid and attributable to the apprentice; the portfolio of evidence must contain a statement from the employer confirming this.

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

## Assessment methods

**Assessment method 1: Work-based project followed by a presentation with questions and answers** (This assessment method has 2 components.)

### Assessment method 1 component 1: Work-based project

#### Overview

The work-based project is completed after the apprentice has gone through the gateway.

The work-based project should be designed to ensure that the apprentice's work meets the needs of the business, is relevant to their role and allows the relevant KSBs to be demonstrated for the EPA. Therefore, the project's subject, title and scope will be agreed between the employer and the EPAO at the gateway. The employer will ensure it has a real business application and the EPAO will ensure it meets the requirements of the EPA (including suitable coverage of the KSBs assigned to this assessment method). The EPAO should sign-off the project title, at the gateway, to confirm its suitability prior to the project commencing. The rationale for this assessment method is:

- The project is designed to demonstrate the application of knowledge, skills and behaviours as they would in occupational practice. Producing a report reflects normal practice in the workplace for a Procurement & Supply Assistant
- It is a significant and complex piece of work that thoroughly tests both higher and lower order knowledge, skills and behaviours.
- The project report should have a real business benefit and is a cost-effective assessment method.

## Delivery

Apprentices will conduct and submit a project in the form of a report.

The project is compiled after the apprentice has gone through the gateway process. The apprentice will have 14 weeks in total to complete their project once the EPAO has agreed the project title.

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

The EPAO must provide a generic specification for a range of qualifying projects, to enable the employer to select a project that will meet the requirements of the EPA. Note that the employer is not restricted to this selection; however, the project scope and title must be signed off at the gateway by the EPAO to ensure sufficient coverage of the assigned KSBs.

Each work-place project must enable the following to be demonstrated:

- the application of knowledge, skills and behaviours mapped to this method
- the approach to planning and completion of the work-based project

The work-place project may be based on any of the following (these are examples):

- review how their organisation uses procurement systems to select their suppliers and make recommendations on how the organisation could improve these systems in order to improve efficiency and the way in which goods are ordered
- review the current practice of how they maintain, create and amend purchase orders and contract records in order to ensure tighter controls and cost savings, and evaluate the impact this has had on the purchasing system for the organisation
- evaluate the use of ad-hoc and low spend suppliers and make recommendations on how this can be used to improve responsible procurement in evaluating potential suppliers, quotes and tenders

The project should be in the form of electronic or paper based.

The project report will be a contextualised project report of 3000 words, making use of graphs and pictorial representations of findings (+ or - 10% at the apprentice's discretion) excluding annexes. It should be based on an area of work that the apprentice works in.

The project will be conducted as set out here:

The apprentice will have 12 weeks to complete the research for the project and 2 weeks to write the project report (14 weeks in total).

In order to ensure the project report is robust and sufficiently covers the KSBs, the plan should include:

- Introduction
- Background
- Aims and Objectives
- Research
- Outcomes including business implications/procurement activities
- Conclusions
- Recommendations

The project report must include, in addition to the word count, an annex showing how the project maps to the KSBs that are being assessed by this method.

The evidence must be attributable to the apprentice. It must be accompanied by a statement outlining the apprentice's contribution, signed by the apprentice and their employer.

The project report plus materials relating to the presentation (see below) must be submitted together after the gateway.

The apprentice should complete their project unaided. When the project report is submitted, the apprentice and their employer must verify that the submitted project report is the apprentice's own work.

The independent assessor will have 2 weeks to review and assess the project report holistically together with the other components of this assessment method.

The independent assessor will make all grading decisions.

### Marking

The independent assessor will review and mark the project in a timely manner, as determined by the EPAO, and without extending the EPA unnecessarily. Similarly, all quality control processes will also be conducted in a timely manner, as determined by the EPAO.

### Supporting material

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

- Independent assessor training materials
- Assessment specifications
- Grading guidance
- Question bank
- Assessment recording documentation
- Examples of projects

## Assessment method 1 component 2: Presentation with questions and answers

### Overview

Apprentices will prepare and deliver a presentation that appropriately covers the KSBs assigned to this method of assessment.

The presentation will be based on an overview of the project report.

The presentation with questions and answers will take place on a one-to-one basis between the independent assessor and the apprentice.

The presentation will be an overview of the project report, and so a copy of the completed project report must be given to the assessor with the presentation so that they can be reviewed together, during which time the independent assessor can prepare questions for the presentation.

The work-based project report and presentation with questioning will be graded holistically as one assessment method.



The rationale for this assessment method is:

The presentation is a component of the work-based project assessment method and it allows a practical demonstration of professional competence. The project report and presentation will contribute to the employer's business and be part of the apprentices' everyday work, ensuring that they can demonstrate KSBs in practice.

## Delivery

The presentation of the work-based project and questioning will last for 45 minutes (+10%, at the discretion of the assessor). The presentation will typically last for 20 minutes and questioning will typically last for 25 minutes.

EPAOs must schedule the presentation and questioning elements to take place during the end-point assessment period after the completion of the project report, giving an apprentice a minimum of two weeks' notice of the time, date and venue.

Apprentices can use presentation tools such as power point, video clips, flip chart, work products etc. EPAOs must ensure that any reasonable presentation requirements are in place, e.g. power point facilities; apprentices must make any requirement requests at least one week prior to the scheduled date for the presentation and questioning.

EPAOs must produce sample questions as a guide for their independent assessors.

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

The presentation must take place in a quiet room free from distractions and influence.

The presentation will be completed and submitted after the gateway and will be presented to an independent assessor, either face-to-face or via online video conferencing. If using an online platform, EPAOs must ensure appropriate measures are in place to prevent misrepresentation and ensure the apprentice is not aided in any way, e.g. by the use of a 360 degree camera.

The independent assessor will ask a minimum of 6 questions at the end of the presentation. The questions will be drawn from a question bank supplied by the EPAO, to confirm the independent assessor's understanding of the presentation and how it demonstrates the relevant KSBs. However, follow up questions may be generated by the assessor and used to take account of the presentation evidence.

The independent assessor will make all grading decisions.

## Venue

EPAOs must ensure that the presentation and questioning elements are conducted in a suitable controlled environment in any of the following:

- Employer's premises
- Other suitable venue selected by the EPAO (for example a training provider) ·
- Video conferencing

The presentation should be conducted in a quiet space, free from distraction and external influence.

## Supporting material

EPAOs will produce the following materials to ensure that this assessment method is marked consistently and accurately:

- Outline of the assessment method's requirements
- Marking materials
- EPAO supporting guidelines
- Template to record answers to questions.

## Assessment method 2: Interview underpinned by a portfolio of evidence (This assessment method has 1 component.)

### Assessment method 2 component 1: Interview

#### Overview

This assessment will take the form of an interview which must be appropriately structured to draw out the best of the apprentice's competence and excellence and cover the KSBs assigned to this assessment method. Questioning should assess the KSBs assigned to this assessment method and the apprentice may use their portfolio to support their responses.

The rationale for this assessment method is:

It allows the apprentice to be assessed against KSBs that may not occur naturally on a daily basis. It is underpinned by a portfolio of evidence, enabling the apprentice to demonstrate the application of skill and behaviours as well as knowledge.

#### Delivery

The independent assessors will conduct and assess the interview.

The interview must last for 60 minutes. The independent assessor has the discretion to increase the time of the interview by up to 10% to allow the apprentice to complete their last answer. Further time may be granted for apprentices with appropriate needs in line with the EPAOs Reasonable Adjustment Policy.

During this method, the independent assessor must combine questions from the EPAO's question bank and those generated by themselves.

The interview will be conducted as set out here:

The interview will be conducted on a 1:1 basis and lead by the independent assessor. It will be undertaken in an appropriate environment (a quiet space free from distraction). Evidence must be captured using documentation produced by the EPAO. The independent assessor will ask a minimum of 6 open questions taken from an EPAO question bank and those generated by the independent assessor. Follow up questions can be used to draw out further evidence.

The apprentice should be encouraged to refer to their portfolio of evidence during the interview to support their responses.

The independent assessor should have a minimum of 10 days to review the contents of the portfolio in order to generate appropriate questions. This will have been submitted to the independent assessor at the gateway.

The independent assessor must use the assessment tools and procedures that are set by the EPAO to record the response to questions. Video conferencing can also be used to conduct the presentation with Q&A, but the EPAO must have processes in place to verify the identity of the apprentice and ensure the apprentice is not being aided.

The interview should be recorded (audio only) for quality assurance and moderation purposes.

The recordings will be kept safe and stored by the EPAO in line with data protection legislation and destroyed after a maximum of 1 month after the period for the appeals process has passed.

The independent assessor will make all grading decisions.

### Venue

The interview should take place in a quiet space, free from distractions and influence.

The interview can take place in any of the following:

- Employer's premises
- A suitable venue selected by the EPAO (for example a training provider's premises)
- Video conferencing

### Other relevant information

A structured test specification and question bank must be developed by EPAOs. The 'question bank' must be of sufficient size to prevent predictability and the EPAO must reviewed regularly (at least once a year) to ensure that it, and its content, are fit for purpose. The specifications, including questions relating to the underpinning KSBs, must be varied yet allow assessment of the relevant KSBs. EPAOs must ensure that apprentices have a different set of questions in the case of re-sits/re-takes.

Independent assessors must be developed and trained by the EPAO in the conduct of an interview and reaching consistent judgements.

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

- Outline of the assessment method's requirements
- Marking materials
- Independent assessor training materials
- Grading guidance
- A question bank
- Assessment recording documentation

## Reasonable adjustments

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

## Weighting of assessment methods

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

## Grading

### Assessment method 1: Work-based project followed by a presentation with Q&A

KSBs	Fail	Pass The apprentice must meet all of the pass descriptors below	Distinction The apprentice must meet all of the distinction descriptors below
<b>K4 K8</b> <b>K11 K12</b> <b>K13 K14</b>  <b>S3 S4 S5</b> <b>S7 S8 S10</b> <b>S12 S16</b>  <b>B3 B5</b>	Does not meet the pass criteria.	<p>Justifies their analysis and forecasting techniques used in the project when evaluating historical usage of databases and spreadsheets to identify demand and spend management with suppliers and stakeholders (K4)</p> <p>Explains why it is important to be attentive to detail when developing and evaluating requests for quotes and tenders ensuring correct use of terms, conditions and templates used by their organisation (K8, B5)</p> <p>Illustrates the use of responsible procurement techniques to evaluate suppliers, quotes and tenders to ensure that their decisions are based on evidence provided (K11, S12)</p> <p>Summarises the research methods used for procurement and how they</p>	<p>Reviews the impact of their procurement decisions and how this impacts on the environment and social elements in their supply chain and when evaluating potential suppliers and tenders (K11, S12)</p> <p>Analyses and justifies the decisions they have made when selecting suppliers and why the particular suppliers were considered the correct suppliers for the product including the impact on the procurement system if an incorrect supplier had been selected (S8)</p> <p>Interprets the contractual obligations of the business in order to make recommendations to changes to suppliers within their area of responsibility and the impact of service this will have on their organisation (K13, S16)</p>

		<p>are used to select suppliers for the most appropriate products and services for purchases within their remit and placing purchase orders for the products (K12, S8)</p> <p>Recognises the legal and regulatory environment affecting procurement and explains why these must be adhered to, especially in their organisation's contractual obligations with suppliers (K13, K14)</p> <p>Interprets, compares and evaluates information when using the relevant procurement systems and databases to create, maintain and amend purchase orders and contract records and produces spreadsheets to detail historical spending with suppliers (S3, S4, S7)</p> <p>Demonstrates the research methods used and analysis they have undertaken to review demand, spend, trends of potential suppliers and present findings and data in all formats relevant to the project (S5, S10)</p> <p>Demonstrates their reliability and openness when considering the impact of the decision making process when interacting with their supply chain, being open and respectful of their concerns (S16, B3)</p>	
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## Assessment method 2: Interview underpinned by a portfolio of evidence

KSBs	Fail	Pass	Distinction
		The apprentice must meet all of the pass descriptors below	The apprentice must meet all of the distinction descriptors below

<b>K1 K2</b> <b>K3 K5</b> <b>K6 K7</b> <b>K9 K10</b> <b>K15</b>  <b>S1 S2</b> <b>S6 S9</b> <b>S11</b> <b>S13</b> <b>S14</b> <b>S15</b> <b>S17</b>  <b>B1 B2</b> <b>B4 B6</b> <b>B7</b>	Does not meet the pass criteria.	<p>Explains the role of procurement within the organisation and shows how they monitor and order products and services using the correct procurement methods (K1, S1).</p> <p>Describes the value for money concepts used by their organisation and how they are used to determine added value when evaluating quotes and tenders to support recommendations for awards (K2, S6)</p> <p>Discusses the supplier approval process including the importance of due diligence checks and when they have used these to support the contract negotiations and mini competitions with suppliers ensuring that they are professional, impartial and unbiased in their advice (K3, S17, B6)</p> <p>Describes their approach to the appraisal of adhoc and low spend suppliers when setting them up on the purchasing system (S9)</p> <p>Describes the importance of developing and establishing key stakeholder relationships</p>	<p>Outlines the role of procurement within their organisation and the impact of what they do in order to ensure that procurement regulations and policies are followed detailing the implications if these are not adhered to (K1)</p> <p>Categorises the importance of due diligence checks and illustrates how they communicate these to key stakeholders recommending areas of improvement for the organisation (K3, S2)</p> <p>Analyses how they manage difficulties with a key stakeholder and justifies the actions they took to resolve the issues to the satisfaction of the stakeholder and the organisation (K5, B6)</p> <p>Describes how they address attention to detail when monitoring and reviewing, anticipating and resolving issues within the limits of their responsibilities (S14)</p>
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		<p>and why there is a need for both prompt and effective communication to support procurement with them (K5, S2, B2)</p> <p>Explains when they have investigated and resolved queries, understanding their own level of authority and giving an example of when it is appropriate to escalate to senior colleagues (K7, S13)</p> <p>Discusses the importance of developing accurate specifications and requests for quotes/tenders that reflect their organisation's needs in a procurement exercise which provides equality of opportunity for all suppliers providing quotes and tenders (K6, S11)</p> <p>Describes why it is important to maintain accurate records and files for procurement which meet both organisational and regulatory requirements, and for audit purposes (K9)</p> <p>Describes the communication methods that are used for the organisation's requirements ensuring they are appropriate to the task and the risk involved with these (K10)</p> <p>Describes the 4 processes of negotiation and how they use these to own their low risk projects and contribute to higher risk activities when reviewing</p>	
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		<p>orders and stock control (K15, S14)</p> <p>Describes how they maintain their knowledge on open orders and their status' in order to provide assistance to the purchasing team and where they have amended their practices in response to a change in the process (S15, B1)</p> <p>Acts independently and is self-motivated in order to develop and learn (B7)</p> <p>Operates within their organisation's values and uses these to engage in their own personal development (B4)</p>	
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## Overall EPA grading

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

To achieve a pass, the apprentice must achieve a pass in both assessment methods by achieving at least a pass in all pass criteria.

To achieve a distinction, the apprentice must achieve a distinction in both assessment methods by achieving all pass criteria and all distinction criteria.

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

Assessment method 1 – Work-based project followed by a presentation of the work-based project with Q&As	Assessment method 2 – Interview underpinned by a portfolio of evidence	Overall grading
Fail	Fail	Fail
Pass	Fail	Fail
Fail	Pass	Fail
Pass	Pass	Pass
Pass	Distinction	Pass
Distinction	Pass	Pass
Distinction	Distinction	Distinction

## Re-sits and re-takes

Apprentices who fail one or more assessment method/s will be offered the opportunity to take a re-sit or a re-take at the employer's discretion. The apprentice's employer will need to agree that either a re-sit or re-take is an appropriate course of action.

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

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

The timescales for a re-sit/re-take is agreed between the employer and EPAO. A re-sit is typically taken within 2 months of the EPA outcome notification. The timescale for a re-take is dependent on how much re-training is required and is typically taken within 4 months of the EPA outcome notification.

All assessment methods must be taken within a 6 month period, otherwise the entire EPA will need to be re-sat/re-taken.

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

Where any assessment method has to be re-sat or re-taken, the apprentice will be awarded a maximum EPA grade of pass, unless the EPAO determines there are exceptional circumstances requiring a re-sit or re-take.

## Roles and responsibilities

Role	Responsibility
Apprentice	<p>As a minimum, apprentices should:</p> <ul style="list-style-type: none"> <li>• participate in development opportunities to improve their knowledge skills and behaviours as outlined in the standard</li> <li>• meet all gateway requirements when advised by the employer</li> <li>• understand the purpose and importance of EPA and undertake EPA</li> </ul>
Employer	<p>As a minimum, employers should:</p> <ul style="list-style-type: none"> <li>• support the apprentice to achieve the KSBs outlined in the standard to their best ability</li> <li>• determines when the apprentice is working at or above the level outlined in the standard and is ready for EPA</li> <li>• select the EPAO</li> <li>• confirm arrangements with EPAO for the EPA (who, when, where) in a timely manner</li> <li>• ensure apprentice is well prepared for the EPA</li> <li>• plays no part in the EPA itself</li> <li>• should not be involved in the delivery of the EPA</li> </ul>
EPAO	<p>As a minimum EPAOs should:</p> <ul style="list-style-type: none"> <li>• understand the occupational role</li> <li>• appoint administrators/invigilators and markers to administer/invigate and mark the EPA</li> <li>• provide training and CPD to the independent assessors they employ to undertake the EPA</li> <li>• provide adequate information, advice and guidance documentation to enable apprentices, employers and providers to prepare for the EPA</li> <li>• deliver the end-point assessment outlined in this EPA plan in a timely manner</li> <li>• prepare and provide all required material and resources required for delivery of the EPA in-line with best practices</li> <li>• use appropriate assessment recording documentation to ensure a clear and auditable mechanism for providing assessment decision feedback to the apprentice</li> </ul>

	<ul style="list-style-type: none"> <li>• have no direct connection with the apprentice, their employer or training provider i.e. there must be no conflict of interest</li> </ul>
	<ul style="list-style-type: none"> <li>• maintain robust internal quality assurance (IQA) procedures and processes, and conducts these on a regular basis</li> <li>• conform to the requirements of the nominated external quality assurance body</li> <li>• organise standardisation events and activities in accordance with this plan's IQA section</li> <li>• organise and conduct moderation of independent assessors' marking in accordance with this plan</li> <li>• have, and operate, an appeals process</li> <li>• arrange for certification with the relevant training provider</li> </ul>

Independent assessor	<p>As a minimum independent assessors should:</p> <ul style="list-style-type: none"> <li>• understand the standard and assessment plan</li> <li>• deliver the end-point assessment in-line with the EPA plan</li> <li>• comply to the IQA requirements of the EPAO</li> <li>• be independent of the apprentice, their employer and training provider(s) i.e. there must be no conflict of interest</li> <li>• satisfy the criteria outlined in this EPA plan</li> <li>• hold or be working towards an independent assessor qualification e.g. A1 and have had training from their EPAO in terms of good assessment practice, operating the assessment tools and grading</li> <li>• have the capability to assess the apprentice at this level</li> <li>• attend the required number of EPAOs standardisation and training events per year (as defined in the IQA section)</li> </ul>
Training provider	<p>As a minimum training providers should:</p> <ul style="list-style-type: none"> <li>• work with the employer to ensure that the apprentice is given the opportunities to develop the KSBs outlined in the standard and monitor their progress during the on-programme period</li> <li>• advise the employer, upon request, on the apprentice's readiness for EPA prior to the gateway</li> <li>• plays no part in the EPA itself</li> </ul>

## Internal Quality Assurance (IQA)

Internal quality assurance refers to the requirements that EPA organisations must have in place to ensure consistent (reliable) and accurate (valid) assessment decisions. EPA organisations for this EPA must:

- Appoint independent assessors who have knowledge of the following occupational areas - Procurement and Supply.
- Appoint independent assessors who have recent relevant experience of the occupation/sector at least one level above the apprentice gained in the last three years or significant experience of the occupation/sector.
- Appoint independent assessors who are members of relevant professional bodies.
- Provide training for independent assessors in terms of good assessment practice, operating the assessment tools and grading.
- Have robust quality assurance systems and procedures that support fair, reliable and consistent assessment across the organisation and over time.

- Operate induction training and standardisation events for independent assessors when they begin working for the EPAO on this standard and before they deliver an updated assessment method for the first time.
- Ensure independent assessors attend standardisation events on an ongoing basis and at least once per year for this standard.
- Conduct appeals where required, according to the EPAO's appeals procedure, reviewing and making final decisions on assessment decisions and grades.

## Affordability

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

- Use of technology – for example video conferencing where applicable •  
Location – for example use of employer premises

## Professional body recognition

This apprenticeship is designed to prepare successful apprentices to meet the requirements for registration as a Procurement & Supply Assistant with:

- Chartered Institute of Procurement and Supply

## Mapping of knowledge, skills and behaviours (KSBs)

### Assessment method 1: Work-based project followed by a presentation of the work-based project with Q&A

Knowledge
<b>K4</b> Demand and spend management, analysis and forecasting techniques including quantitative methods such as historical usage, spend and trend analysis, inventory records and re-order levels or qualitative techniques based on stakeholders' estimates using internal databases and spreadsheets.
<b>K8</b> Development and evaluation of requests for quotes and tenders and use of appropriate terms, conditions and templates
<b>K11</b> Responsible procurement practices, in making procurement decisions, consideration of the impact of those decisions during the full procurement process on the environment (planet) and social (people) elements across the supply chain. This may include the sustainability impacts of



procurement and supply decisions on both upstream supply chain and the use of materials, products or applications over the lifetime.

**K12** Research methods for Procurement including market, supplier and sector research which may include subscription databases, market reports, internet research, trade bodies, press and events, use of market 'experts', supplier engagement events etc.

**K13** The legal and regulatory environment effecting procurement, including the supply of goods and services act and/or public contract regulations.

**K14** Awareness of the organisation's contractual obligations towards suppliers e.g. payment terms.

### Skills

**S3** Create, maintain and amend purchase order and contract records

**S4** Interpret, evaluate and compare procurement information such as historical spend and usage using databases and spreadsheets.

**S5** Present findings and data in all formats e.g. mathematically, written and oral.

**S7** Utilise relevant Procurement computer systems or internal databases.

**S8** Select the supplier of the most appropriate products and services for purchases within their remit and place purchase order.

**S10** Effectively research and analyse demand, spend, trends, potential suppliers and industries utilising qualitative and quantitative methods.

**S12** Apply considerations of responsible procurement in evaluating potential suppliers, quotes and tenders.

**S16** Able to consider the impact of the decision making process when interacting with the supply chain.

### Behaviours

**B3** Be open, honest, respectful and reliable.

**B5** Be attentive to the detail in any procurement activity.

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

Knowledge
<b>K1</b> The role of Procurement within the organisation and the relevant organisational procurement regulations, policies and processes which must be followed, such as, procedures for obtaining quotes and tenders, purchase order processing and purchase to pay.
<b>K2</b> Value for money concepts including the balancing of quality, price and sustainable considerations or most economically advantageous tender (meat), whole lifecycle costing, 5 rights of procurement and added value opportunities.
<b>K3</b> Supplier approval process and the importance of due diligence checks including legal entity checks, financial appraisal, quality checks and relevant sector approvals, certification and policies.
<b>K5</b> The importance of developing and managing key stakeholder relationships such as the internal customer and supplier and the need for prompt and effective communication to support efficient and effective procurement.
<b>K6</b> The need for accurate specifications of requirements which reflect the organisations needs and provides equality of opportunity for suppliers when providing quotes and tenders.
<b>K7</b> Levels of authority and autonomy both for self and other internal stakeholders and how that relates to the relevant procurement procedure and when issues should be escalated to senior procurement colleagues.
<b>K9</b> The importance of maintaining accurate records and files for procurement in line with organisational and regulatory requirements and for audit purposes.
<b>K10</b> Effective and appropriate communication methods according to organisational requirements, service level agreements and the degree of risk involved and appropriate to the task required e.g. expediting supplies, resolving invoice queries and supplier review meetings.
<b>K15:</b> Understand the 4 processes of negotiation (preparation, opening, bargaining and closure).
Skills
<b>S1</b> Monitor and order products, stock, equipment and services at appropriate times using the appropriate procurement method.
<b>S2</b> Communicate to procurement's internal stakeholders, suppliers and other stakeholders in order to develop effective relationships and networks.
<b>S6</b> Determine value for money (VFM) and added value through the use of Total Cost of Ownership during the evaluation process and apply the most economically advantageous tender (MEAT) criteria to the evaluation of quotes and tenders to support the recommendation at award. This may include the inclusion of green, low carbon, sustainability, and ethical criteria.
<b>S9</b> Undertake appraisal of adhoc and low spend suppliers including setting them up on the purchasing system.

<b>S11</b> Develop specifications of requirements and requests for quotes/tenders in line with organisational requirements.
<b>S13</b> Investigate and resolve purchase order, delivery and invoice queries.
<b>S14</b> Own low risk value projects such as supply contracts for stationery, PPE or other consumables, and contribute to higher risk activities such as contracts for building services or machinery, and track, log, expedite and review outstanding orders and stock availability where applicable.
<b>S15</b> Maintain knowledge on all open orders and their status' and provide assistance to all purchasing staff e.g. expediting and feeding information back to the relevant stakeholders.
<b>S17</b> Able to support the contract negotiations and mini competitions with suppliers.

Behaviours
<b>B1</b> Be open to change, amend working practices in response to changes in process with a positive attitude.
<b>B2</b> Establish strong relationships with internal and external stakeholders.
<b>B4</b> Be enthusiastic and passionate when adhering to company values and engaging in your personal development.
<b>B6</b> Be professional, impartial and unbiased in your communication, advice and recommendations to procurement stakeholders or colleagues.
<b>B7</b> Be self-motivated to develop and learn.