

# **Bid and Proposal Co-ordinator Apprenticeship Standard, Level 3**

## **End-Point Assessment Plan**

March 2018

## Summary of Assessment

### Introduction

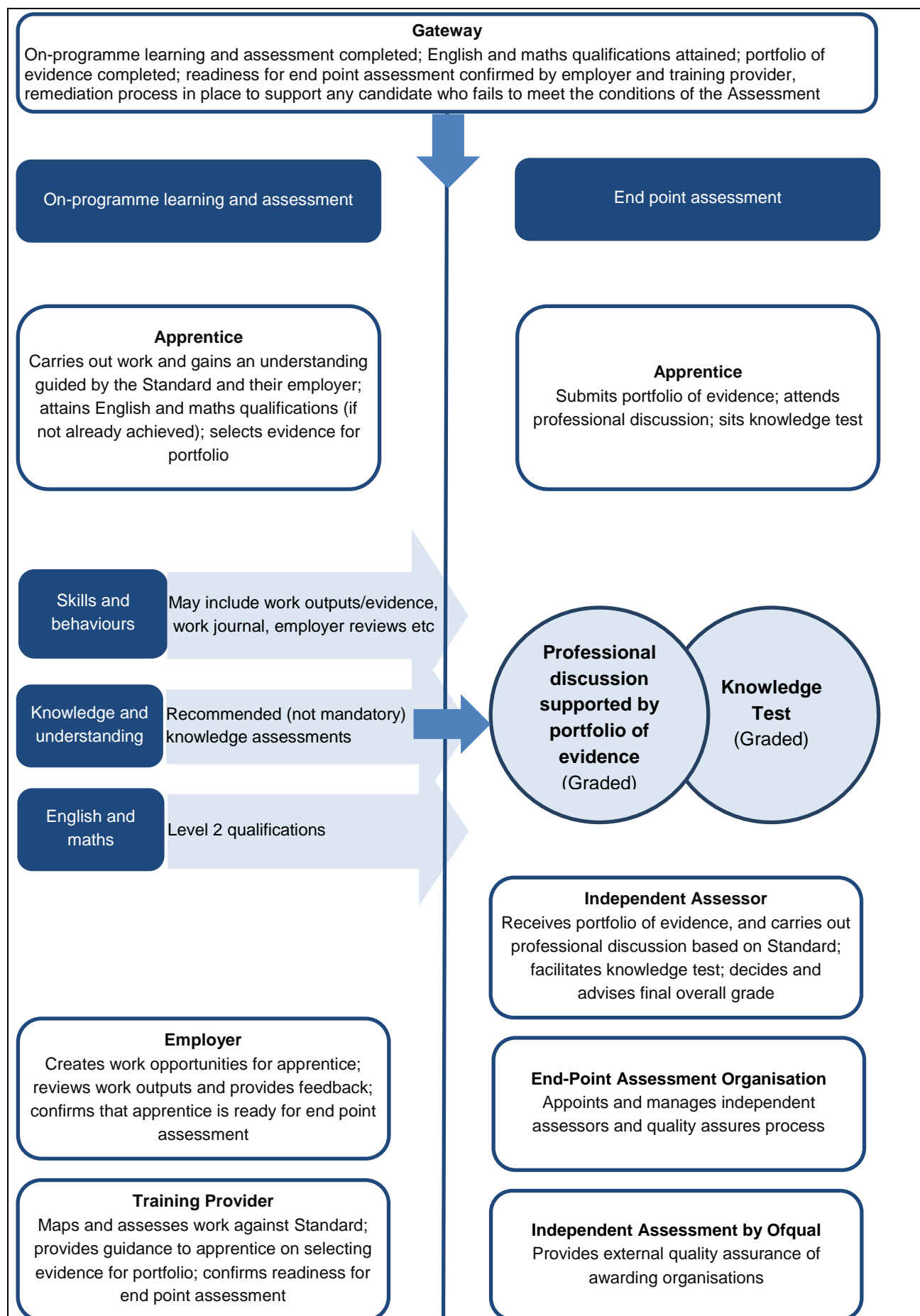
This document sets out the requirements and process for the End-Point Assessment (EPA) of the Bid and Proposal Co-ordinator Level 3 apprenticeship. It is written for end-point assessment organisations who need to know how EPA for this apprenticeship must operate. It will also be of interest to Bid and Proposal Co-ordinator apprentices, their employers and training providers.

The Assessment Plan has been designed to ensure that apprentices meet the knowledge, skills, and behaviour (KSB) outcomes as defined in the Bid and Proposal Apprentice Standard – Level 3 (Standard).

In order to support the acquisition of technical knowledge and practical skills to the required standard, the following principles will inform our approach:

- The competencies and skills of the employees will allow for transferability across the industry in England;
- The assessment methods will be consistent irrespective of where companies are located, their size and their industry.

The assessment process is a unified approach to ensure the successful delivery of this apprenticeship for the apprentice and the employer. The employer will continuously support the apprentice through 'on the job' training that meets the Standard and demonstrates their development of the listed KSB.



Assessment Overview [set out key assessment information]			
Assessment Method	Area Assessed	Assessed by	Grading
Professional discussion supported by portfolio of evidence	All skills, knowledge / behaviours listed in the standard	Independent End-Point Assessment Organisation	Fail / Pass / Merit / Distinction
Knowledge Test	Knowledge listed in the standard	Independent End-Point Assessment Organisation	Fail / Pass / Merit / Distinction
On-programme Assessment			
<p><b>Employer</b></p> <p>It is encouraged that the apprentice's employer will review their progress in compiling the portfolio of evidence against the Standard on a maximum of a bi-monthly basis. The employer will guide the apprentice and provide opportunities to fulfil the requirements of the Standard.</p> <p><b>Training Provider</b></p> <p>The training provider will request, review and comment on the apprentice's portfolio of evidence every six months, as a minimum. This will ensure that the apprentice is on plan to meet the Standard within the expected 18 – 24 months.</p>			
Assessment Gateway			
<p>Employers and training providers must satisfy themselves that the apprentice is ready for their EPA and the employer will make the final judgement call. The apprentice can be put forward for the EPA typically after 18 months into their apprenticeship, and at a time when the employer is satisfied that the apprentice's portfolio of evidence is complete and includes sufficient evidence to clearly demonstrate that they meet the KSB listed in the Standard.</p> <p>Although the apprentice should only be recommended for the EPA when they are ready, employers and training providers will have a remediation process in place to support any candidate who fails to meet the conditions of the Assessment Gateway.</p> <p>Apprentices without level 2 English and maths will need to achieve this prior to taking the EPA. For those with an education, health and care plan or a legacy statement the apprenticeships English and maths minimum requirement is Entry Level 3 and British Sign Language qualification are an alternative to English qualifications for whom this is their primary language.</p>			
End-point - Assessment			
<p><b>What</b></p> <p>The EPA will evaluate the KSBs as listed in the Standard. The assessment will consist of a professional discussion, supported by a portfolio of evidence completed on programme, and a knowledge test.</p> <p>The EPA will typically take place no earlier than 18 months into the apprenticeship.</p> <ul style="list-style-type: none"> <li>• <b>Portfolio of Evidence</b> – The portfolio of evidence will form the basis for the professional discussion and should include between 12 – 15 pieces of evidence split equally across the three KSB areas as listed in the Standard. I.e. 4/5 pieces of evidence under the knowledge category 4/5 under skills and 4/5 under behaviours. The portfolio of evidence</li> </ul>			

must be completed before the apprentice can pass through the Gateway to the EPA. It can be completed using the following types of evidence:

- Witness testimonies e.g. line manager observations
- Recorded observations by third party
- Examples of work e.g. bid plan, response document, written case studies etc.
- Training records (can include formal and informal training)
- Research

Templates to record evidence, including research, training and observation templates, can be in any format as long as they contain the information as listed above.

**Professional Discussion** – The independent assessor will review the portfolio of evidence for context and ask 8 - 10 open questions from their question bank, split equally between scenario and factual based questions, to assess the KSBs listed in the Standard in Appendix 1. The discussion, which is envisaged, will include half scenario and half factual based questions to determine the apprentice's level of understanding and will last one hour. This professional questioning should cover a minimum of **2 knowledge areas; 3 skill areas and 3 behaviours. Within each area assessed each question should cover no more than 2 of the requirements against each area.**

- Questions could cover, for example:
  - **Knowledge:** Please explain your role within the customer engagement and capture planning process of a recent bid
  - **Skill:** Tell us about your process for identifying and understanding client requirements along with the importance of putting the customer first and tailoring your submissions
  - **Behaviour:** Give me a specific example of when you have displayed professionalism within a team
- **Knowledge Test** – This will be used to test the apprentice's knowledge as listed in the Standard - see Appendix 1. The test will last for 2 hours 15 minutes and include 6 questions comprising of 5 essay-style questions and 1 practical written assessment. It is suggested that the apprentice should spend 20 minutes per essay style question, and 35 minutes to read and answer the practical assessment. Each of the five knowledge areas must be assessed (1 question per knowledge area plus the practical written assessment which assesses the writing and editorial skill area) and the test must be closed book meaning no notes or text books can be taken into the test. The knowledge test should cover areas such as:

Essay style questions, which are a level 3 challenge, provide the apprentice with the opportunity for them to discuss, analyse and evaluate information in their answers

- Describing each stage of the end to end bid process within your organisation
- Describing the importance of a bid plan in the lifecycle of a bid opportunity
- Describing the responsibilities of a knowledge base manager and their role within the wider bid team

Practical:

- Reviewing a bid question and response or executive summary and suggesting improvements that could be made, including annotations to the wording of the content, and proposals for amendments to the content (e.g. consistent customer name, including call outs, rewrite the opening sentence)

## How

The apprentice will be assessed via a professional discussion and by a separate knowledge test.

The apprentice will be given the appropriate experience, and/or they will need to proactively research criteria where experience cannot be gained through their employer, to be able to complete their portfolio of evidence and knowledgeably contribute to the professional discussion and the knowledge test. Employers and training providers should work together to ensure that the apprentice has the appropriate opportunity through training and live bid opportunities.

Employers will select and make contact with an End-Point Assessment Organisation from the Education and Skills Funding Agency's (ESFA), Register of End-Point Assessment Organisations (RoEPAO). Employers should agree the date of the professional discussion and knowledge test, and whether the EPA will be face to face or remote (e.g. web-based, video call). Employers should give some context to the End-Point Assessment Organisation about their organisation and the type of bids the apprentice has been working on to help the End-Point Assessment Organisation develop an appropriate and relevant assessment. The employer will provide the End-Point Assessment Organisation a three month notice period of an apprentice being ready for their EPA

- **Professional Discussion** - Apprentices will be expected to take part in a professional discussion led by the End-Point Assessment Organisation. The End-Point Assessment Organisation should review the portfolio of evidence to select appropriate topics for discussion. These topics will be selected for clarification and confirmation of evidence and non-evidence provided within the apprentice's portfolio. All topics are included within the Standard as shown in Appendix 1.

Apprentices will develop a portfolio of evidence throughout their apprenticeship. The employer and training provider will regularly review progress with the apprentice to ensure the apprentice is on target to meet the EPA date (no earlier than 18 months into the apprenticeship) and that they are collecting appropriate evidence within their portfolio. The portfolio of evidence will typically be submitted to the End-Point Assessment Organisation one month before the date of the professional discussion. The portfolio of evidence is not assessed as part of the EPA, however the apprentice can use evidence from within their Portfolio to support their answers to the questions.

The question bank for the professional discussion, developed by the End-Point Assessment Organisation, will need to include sufficient questions to mitigate predictability during resit tests. Questions should be reviewed annually, and each bank should hold a minimum of 30 questions based on the KSBs within Appendix 1. The End-Point Assessment Organisation will also review the portfolio of evidence against the KSBs as listed in the Standard at Appendix 1 and may use this exercise to identify questions from the bank which will draw out further clarification on areas from the portfolio of evidence.

The professional discussion should last 1 hour and be held between the apprentice and the independent assessor. It can take place face to face or remotely, utilising video

conferencing facilities. In both circumstances the discussion should take place in an environment which is free from interruptions and influence.

**Knowledge Test** - Apprentices will be expected to answer 6 written questions set and assessed by the End-Point Assessment Organisation.

The knowledge test must take place under test conditions and can be taken remotely within a suitable environment made available by the employer, or at a test facility made available by the End-Point Assessment Organisation.

The definition of controlled conditions will be set out by the End-Point Assessment Organisation, which will clearly define and explain the requirements. However, at a minimum, the controlled conditions must include apprentices not having any access to the internet, email or data stored on the hard drive of a computer or portable storage media e.g. memory sticks and must also include apprentices not having access to any unauthorised materials, including web enabled sources of information (iPods and mobile phones) during the knowledge test. The controlled conditions to be complied with, should also include any specific requirements in relation to the assessment environment, such as, lighting, space, privacy and the requirements for an invigilator to follow best practice processes.

The test will last 2 hours and 15 minutes and there should be a suitable and trusted invigilator present for the duration of the test. The invigilator must be independent from the candidate and must follow the rules for the role set out by the EPAO. The apprentice to invigilator ratio should be no more than 10:1. Tests can be paper based or online (to be agreed with the End-Point Assessment Organisation and Employer), and where tests are paper based, they should be signed / verified by the invigilator and submitted to the independent assessor.

The question bank for the knowledge test developed by the End-Point Assessment Organisation will need to include sufficient questions to mitigate predictability during resit tests. Questions should be reviewed and refreshed annually, and each bank should hold a minimum of 50 essay-style questions and 10 practical written assessment questions.

Both assessment methods (knowledge test and professional discussion) should take place on the same day where possible, or within a 14 day period. Assessments can take place at any time during the year, as long as the apprentice has reached the gateway criteria and/or the resit policy criteria.

## Who

Both the professional discussion and the knowledge test will be carried out by one End-Point Assessment Organisation chosen by the employer. They will meet the internal and external quality assurance requirements outlined in this assessment plan.

The End-Point Assessment Organisation must be independent of the training organisation and be on the RoEPAO.

The professional discussion must be assessed independently by an independent assessor appointed by the End-Point Assessment Organisation. The End-Point Assessment Organisation will review the portfolio of evidence submitted by the apprentice and select the professional discussion questions. The End-Point Assessment Organisation will make the final grading decision.



Knowledge tests will be marked by the End-Point Assessment Organisation in line with the grading criteria provided included within this plan.
<b>End-point – final judgement</b>
The final judgement regarding whether the apprentice has passed the apprenticeship, and at what grade, will be made by the End-Point Assessment Organisation. Apprentice outcomes can be a fail, pass, merit or a distinction.
<b>Independence</b>
<p>The EPA will be provided by an End-Point Assessment Organisation that will assess all the components and then make the final decision regarding the grade to be given. The End-Point Assessment Organisation will be on the ESFA's RoEPAO.</p> <p>An independent assessor must conduct the EPA of each apprentice so that all apprentices following the same Standard are assessed consistently.</p> <p>Employers of apprentices will select an organisation from the RoEPAO to conduct the independent EPAs.</p>
<b>End-point - Grading</b>
<p>Performance in the EPA will determine the apprenticeship grade of fail, pass, merit or distinction. Each assessment method will be individually graded fail, pass, merit or distinction. In order to gain an apprenticeship pass or higher grade, the apprentice must achieve a minimum of a pass in both of the EPA methods.</p> <p>An apprenticeship pass represents full competence and understanding against the Standard.</p> <p>A grade of merit means an apprentice is demonstrating some competence and understanding above the Standard.</p> <p>A grade of distinction means an apprentice is consistently demonstrating competence and understanding above the Standard.</p> <p><b>Grading Criteria</b></p> <p>Assessments should be graded in line with the criteria as listed in Appendix 2 – Grading Table.</p> <p><b>Grading Aggregation</b></p> <p>The apprentice will be assessed against the criteria within Appendix 2 – Grading Table, to determine which level they have performed at for both elements of the assessment, professional discussion with portfolio of evidence, and knowledge test. Their overall grade will be determined as follows:</p> <ul style="list-style-type: none"> <li>• Pass – requires the apprentice to pass both elements of the assessment. This means achieving an overall pass grade for the professional discussion and achieving a minimum of a pass for each of the 6 knowledge test questions.</li> <li>• Merit – requires the apprentice to achieve at least a merit in both the professional discussion, and in 4 out of the 6 knowledge test questions</li> </ul>



- Distinction – requires the apprentice to achieve a Distinction in both the professional discussion, and in 4 out of the 6 knowledge test questions

### Resit and Retake Policy

If an apprentice fails either of the assessment methods, this will result in an overall fail. Apprentices will be able to retake the EPA following a period of further learning and no sooner than six months after the previous assessment.

If the apprentice passes the knowledge test, but fails the professional discussion, the successful knowledge test is carried forward without the need of a retake.

If an apprentice fails the knowledge test, but passes the professional discussion, the successful professional discussion is carried forward without the need of a retake.

The question bank for the knowledge test and professional discussion developed by the End-Point Assessment Organisation will need to include sufficient questions to mitigate predictability during retakes and resits. This has been defined as a minimum of 50 essay-style questions and 10 practical written assessment questions, and 30 professional discussion questions.

Where an apprentice has either not attended the assessment or it is deemed there was an extenuating circumstance preventing them from passing the assessment then a resit may be taken (where no further learning is required) and rescheduled directly with the End Point Assessment Organisation.

### End-point – Summary of roles and responsibilities [set out the role of each organisation/person involved in assessment]

Role	Responsibilities
Employer	<ul style="list-style-type: none"> <li>• Provide opportunities for the apprentice to gain knowledge in line with the required KSB</li> <li>• Support the apprentice to prepare for their professional discussion and knowledge test</li> <li>• Guide the apprentice to select the appropriate evidence to include in their portfolio</li> <li>• Must have an excellent knowledge and understanding of the Standard</li> <li>• Complete and encourage others to provide observational evidence for behavioural competencies to be included in the portfolio of evidence</li> <li>• Review portfolio bi-monthly and provide confirmation that apprentice is ready for EPA / gateway</li> <li>• Select the training provider and End-Point Assessment Organisation</li> <li>• Provide context to the End-Point Assessment Organisation about their organisation and the type of bids the apprentice has been working on to help the End-Point Assessment Organisation develop an appropriate and relevant assessment.</li> <li>• The employer may wish to refer to the Employer Occupational Brief which includes recommendations for on programme training. The brief can be found at <a href="http://www.ukapmp.co.uk">www.ukapmp.co.uk</a></li> </ul>
Training Provider	<ul style="list-style-type: none"> <li>• Support the apprentice to prepare for their professional discussion and knowledge test</li> <li>• Must have an excellent knowledge and understanding of the Standard</li> <li>• Provide advice to the employer and apprentice as and when needed.</li> </ul>

	<ul style="list-style-type: none"> <li>• Review portfolio and provide confirmation that apprentice is ready for EPA / gateway</li> <li>• Provide and source training in line with the KSBs outlined in the Appendix 1</li> <li>• Must be on ESFA's RoATP (Register of Apprenticeship Training Providers)</li> </ul>
End-Point Assessment Organisation	<ul style="list-style-type: none"> <li>• Must be on the ESFA's RoEPAO</li> <li>• Devise and administer the EPA according to the EPA plan</li> <li>• Provide suitably qualified and competent assessors and independent invigilators</li> <li>• Cooperate with the requests of the external quality assurance organisation (Ofqual) e.g. provide access to be observed in professional discussions</li> <li>• Sample check quality and consistency of assessment methods and outcomes, via observations and review of knowledge test grading</li> <li>• Make the overall end-point grading decision</li> <li>• Communicate the end-point grading decision</li> <li>• For audit purposes record EPA outcomes by Assessor; keep records of all paperwork from the professional discussion and knowledge test, along with grading, for each apprentice</li> </ul>
Independent Assessor	<ul style="list-style-type: none"> <li>• Review the portfolio of evidence</li> <li>• Conduct the professional discussion supported by the portfolio of evidence</li> <li>• Conduct the knowledge test</li> <li>• Grade the professional discussion and knowledge test</li> <li>• Must have a minimum of 5 years working experience in a bid environment, in a senior role (Bid/Proposal Manager, Bid Director, Head of)</li> <li>• Must be qualified as a minimum to Practitioner Level through the Association of Proposal Management Professionals (APMP)</li> <li>• Must have an excellent knowledge and understanding of the Standard. (Assessment organisations will provide evidence to employers in the form of CVs, references and evidence of certification)</li> <li>• Attends annual standardisation events.</li> <li>• Undertakes ongoing CPD</li> </ul>
External Quality Assurance Organisation	<ul style="list-style-type: none"> <li>• External Quality Assurance for this plan will be provided by Ofqual</li> </ul>
Invigilator	<ul style="list-style-type: none"> <li>• Must be independent from the candidate, this could include an employee from the same company as the apprentice in the case of remote testing.</li> <li>• Must conduct independent invigilation for the knowledge test in line with the rules for invigilation as set by the End-Point Assessment Organisation</li> </ul>
<b>Quality Assurance – internal</b>	
Internal quality assurance is carried out by an approved End-Point Assessment Organisation and involves ensuring that individual end-point assessments are undertaken correctly and consistently including the grading, standardisation and reporting of the outcomes of the end-point assessment. It must:	

- Operate moderation of assessment activity and decisions, through examination of documentation and observation of activity. Moderation must be performed on a risk basis, i.e. new or poorly performing independent assessors must have every component of every assessment quality assured, but established, high performing independent assessors can be quality assured on a sampling basis of five percent of their assessments have quality assurance systems and procedures that support fair, reliable and consistent assessment across the organisation and over time
- Ensure there are robust processes in place to deliver end-point assessments to the required standard and that they are appropriate for the sector
- Train all independent assessors to ensure they assess consistently against the requirements of the Standard, including delivery of annual standardisation workshops
- Apply robust internal quality assurance and verification processes to the end-point assessment process.

Internal quality assurance must be completed by an appropriately qualified person, and that person must not have been involved in any aspect of the delivery or end point assessment of the apprenticeship they are quality assuring.

### **Quality Assurance – external**

External quality assurance will be undertaken by Ofqual.

### **Implementation**

#### **Affordability:**

The initial, indicative EPA costs are expected to be in the region of 20% of the apprenticeship costs. The rationale has been based on a predicted amount of 40 starts leading to 120 starts over the next 3 years, and the cost of delivering the EPA using cost effective methods such as Skype and online testing where possible.

#### **Professional body recognition:**

On completion of the apprenticeship the individual could apply for membership to The Association of Bid and Proposal Management Professionals (APMP).

#### **Consistency:**

The use of digital tools such as online tests ensures that the EPA is accessible to all businesses regardless of their size and location.

Assessments and assessment environments must be designed to be accessible to all apprentices and be in line with the Equality Act.

#### **Volumes:**

It is expected that there would be in the region of 40 new starts per year.

## Appendix 1 – Requirements table

Knowledge skills and behaviours	Requirements	Assessment method
<b>KNOWLEDGE</b>		
Context of bidding	Understanding of: <ul style="list-style-type: none"> <li>• Sales life cycle and how it all fits together</li> <li>• Opportunity tracking/pipeline</li> <li>• Customer engagement and Capture planning</li> <li>• Competitive tendering</li> <li>• Presentations</li> <li>• Negotiations</li> <li>• Contract award</li> <li>• Implementation and delivery</li> </ul>	Professional discussion Knowledge test
Bid / Proposal Process	<ul style="list-style-type: none"> <li>• Understand and follow a detailed proposal process from opportunity qualification/Request for Information (RFI) stage, solution development, bid resource allocation, proposal writing and development, production and submission</li> <li>• Use supporting templates and procedures, ensuring necessary steps, reviews and signatories are planned prior to proposal submissions</li> </ul>	Professional discussion Knowledge test
Proposal Development	<ul style="list-style-type: none"> <li>• Know how to use bid software to compile electronic submissions and understand how e-portals work, including how and where electronic tenders are handled</li> <li>• Understand how to assist in the dissection of a bid and identify the customer's key requirements</li> <li>• Understand the relevant customer key issues and win strategy for individual proposals/bids</li> <li>• Understand a range of tools and methods to analyse a proposal e.g. SWOT analysis</li> <li>• Awareness of commercial and pricing positioning and frameworks – to best describe value versus cost</li> <li>• Understand the importance of contract management and the key areas for risk and mitigation of contracts</li> </ul> Awareness of the importance of: <ul style="list-style-type: none"> <li>• handling data</li> <li>• confidentiality</li> <li>• data protection</li> <li>• competition law</li> </ul>	Professional discussion Knowledge test

	<ul style="list-style-type: none"> <li>• relevant business commercial policy</li> </ul>	
Knowledge Management	<ul style="list-style-type: none"> <li>• The importance of relevant, high quality and up to date content including case studies and evidence</li> <li>• Know how and when to use sensitive and confidential information</li> <li>• Maintaining relevant certificates for registrations, accreditations memberships, frameworks, records and subscriptions</li> </ul>	Professional discussion Knowledge test
Roles and responsibilities of the bid team	<p>Understand the roles and responsibilities required for each bid and proposal lifecycle, including:</p> <ul style="list-style-type: none"> <li>• Bid managers / lead</li> <li>• Proposal management</li> <li>• Writers</li> <li>• Document managers</li> <li>• Graphics</li> <li>• Knowledge base managers</li> </ul>	Professional discussion Knowledge test
<b>SKILLS</b>		
Organisation and planning	<ul style="list-style-type: none"> <li>• Excellent organisational and time management skills to manage multiple activities simultaneously and prioritise own and others' workloads</li> <li>• Ability to meet defined deadlines and set own milestones to manage workload</li> <li>• Ability to create and utilise a bid plan timetable and responsibility matrix, supporting virtual team adherence to process</li> <li>• Contribute to proposal project timetable including the timely collection of data from various parties including sub-contractors, consultants and internal subject experts</li> <li>• Ability to meet bid submission deadlines according to guidelines / instructions</li> <li>• Logging and capture of all proposal data in central repository</li> <li>• Able to maintain a healthy work life balance and understand the reasons why it is important to do so</li> <li>• Maintain compliance matrices to ensure compliance to all questions</li> <li>• Capable of managing multiple projects and deadlines</li> </ul>	Professional discussion
Writing and editorial	<ul style="list-style-type: none"> <li>• Ability to proof read with an eye for detail</li> <li>• Good creative writing skills and good grammar/authoring</li> <li>• Collate proposal documents using library/information stores, search engines/corporate directories</li> <li>• Ability to use a range of tools, methods and search engines, to analyse and assimilate data, such as competitor analysis or customer research</li> </ul>	Professional discussion Knowledge Test
Communication	<ul style="list-style-type: none"> <li>• Good verbal and written communication skills, and ability to communicate professionally with colleagues at all levels of the business</li> <li>• Liaise with sales/legal/finance teams and other virtual team members as necessary</li> </ul>	Professional discussion

Customer focus	<ul style="list-style-type: none"> <li>• The importance of putting the customer first and tailoring bid documents to their needs, wants and requirements</li> <li>• Ability to read Client requirements and understand what information is being requested in bid documents</li> </ul>	Professional discussion
Team working and relationship building	<ul style="list-style-type: none"> <li>• Work and engage with colleagues and virtual teams, leveraging relationships and networks to support information gathering and writing</li> <li>• Build relationships with colleagues and subject matter experts across the business, learning the 'go to' people and how to manage their input</li> <li>• Build rapport and trust</li> </ul>	Professional discussion
<b>BEHAVIOURS</b>		
Initiative	<ul style="list-style-type: none"> <li>• A self-starter, with a desire to succeed</li> <li>• Uses initiative to ensure effective workload management, deadlines and co-ordination of activities</li> </ul>	Professional discussion
Flexibility	<ul style="list-style-type: none"> <li>• Willing to work flexibly to ensure that workload is managed effectively, and deadlines are achieved</li> </ul>	Professional discussion
Interpersonal awareness	<ul style="list-style-type: none"> <li>• Awareness of self and impact on others</li> <li>• Able to work across large and virtual teams</li> </ul>	Professional discussion
Results focused	<ul style="list-style-type: none"> <li>• A drive to win</li> <li>• A desire to go the extra mile to deliver winning bids</li> </ul>	Professional discussion
Professionalism	<ul style="list-style-type: none"> <li>• Always acts professionally and ethically, protecting confidentiality of the organisation and customers</li> </ul>	Professional discussion
Innovation	<ul style="list-style-type: none"> <li>• Willingness to continuously look for new and better ways of working, whilst considering the underlining best practice processes</li> </ul>	Professional discussion

## Appendix 2 – Grading Table

Knowledge skills and behaviours	Requirements	Assessment method	Fail	Pass	Merit	Distinction
<b>KNOWLEDGE</b> <b>Professional discussion</b> This professional questioning should cover a minimum of 2 knowledge areas. Within each area assessed each question should cover no more than 2 of the requirements against each area. <b>Knowledge test</b> 5 essay-style questions Each of the five knowledge areas must be assessed (1 question per knowledge area) Within each area assessed each question should cover no more than 2 of the requirements against each area.					To achieve a Merit, the apprentice must achieve the pass criteria, be able to articulate their analysis and evaluations and in addition	To achieve a Distinction, the apprentice must achieve the pass and Merit criteria, and in addition:
Context of bidding	Understanding of: <ul style="list-style-type: none"> <li>• Sales life cycle and how it all fits together</li> <li>• Opportunity tracking/pipeline</li> <li>• Customer engagement and Capture planning</li> <li>• Competitive tendering</li> <li>• Presentations</li> <li>• Negotiations</li> <li>• Contract award</li> <li>• Implementation and delivery</li> </ul>	Professional discussion:	Failure to articulate where questioned an understanding of a knowledge area listed within 'Context of bidding'	Be able to describe the key stages of the sales life cycle in the correct order, and where bidding fits into this lifecycle Demonstrate evidence of research techniques to generate a capture plan for a specific bid, using various tools and techniques to build an understanding of the customer any engagement that has taken place with that customer	Describe the strengths and weaknesses of their own business, when comparing with their understanding of a sales life cycle. Articulate the benefits and disadvantages of their businesses existing bid practices	Taken a lead and used their own initiative to add value to their business through personal/team development or a implemented / suggested improvement(s) to their businesses' existing sales life cycle process



		Knowledge test	<b>Essay style question</b> Failure to demonstrate an understanding of all the knowledge areas listed within 'Context of Bidding'	<b>Essay style question</b> The apprentice is able to write knowledgeably about any of the individual stages of the end to end bid process, articulate what typically happens during each stage and how each stage impacts onto the next	<b>Essay style question</b> Describe examples of how the bid process is structured / used / applicable within their own business and comment on the effectiveness of these processes	<b>Essay style question</b> Describes recommended / implemented improvements to their own business environment, with reference to the positive impact this has had in the context of successful bidding practices
Bid / Proposal Process	<ul style="list-style-type: none"> <li>Understand and follow a detailed proposal process from opportunity qualification/Request for Information (RFI) stage, solution development, bid resource allocation, proposal writing and development, production and submission</li> <li>Use supporting templates and procedures, ensuring necessary steps, reviews and signatories are planned prior to proposal submissions</li> </ul>	Professional discussion	Failure to articulate where questioned an understanding of a knowledge area listed within 'Bid / Proposal process'	Provide evidence through relevant bid tools and documentation of own involvement and role in all stages of the bid process from opportunity qualification/Request for Information (RFI) stage, solution development, bid resource allocation, proposal writing and development, production and submission	Describe the strengths and weaknesses of their own business' bid / proposal process, when comparing with their understanding of the stages of the bid process  Articulate the benefits and disadvantages of their businesses existing bid practices	Taken a lead and used their own initiative to add value to their business through personal/team development or an implemented / suggested improvement(s) to their businesses' bid process
		Knowledge test	<b>Essay style question</b> Failure to demonstrate an understanding of a knowledge areas listed within 'Bid / Proposal process'	<b>Essay style question</b> The apprentice is able to write knowledgeably about:  The individual stages of the bid and proposal process in detail, the importance of the individual stages and benefits to the overall process  How templates and procedures ensure that	<b>Essay style question</b> Provides examples of how the bid process is structured / used / applicable within their own business and comment on the effectiveness of these processes	<b>Essay style question</b> Describes recommended / implemented improvements to their own business environment, with reference to the positive impact this would have / has had in the context of successful bidding practices.

				necessary steps, reviews and signatories are planned prior to proposal submissions		
Proposal Development	<ul style="list-style-type: none"> <li>Know how to use bid software to compile electronic submissions and understand how e-portals work, including how and where electronic tenders are handled</li> <li>Understand how to assist in the dissection of a bid and identify the customer's key requirements</li> <li>Understand the relevant customer key issues and win strategy for individual proposals/bids</li> <li>Understand a range of tools and methods to analyse a proposal e.g. SWOT analysis</li> <li>Awareness of commercial and pricing positioning and frameworks – to best describe value versus cost</li> <li>Understand the importance of contract management and the key areas for risk and mitigation of contracts</li> </ul> <p>Awareness of the importance of:</p> <ul style="list-style-type: none"> <li>handling data</li> </ul>	Professional discussion	Failure to articulate where questioned an understanding of a knowledge area listed within 'Proposal Development'	<p>Show analysis and integration of customer focus, in the dissection of a bid to identify the customer's key requirements</p> <p>Evaluate the effectiveness of the tools and methods available to analyse a proposal</p>	<p>Describe the strengths and weaknesses of their own business' level of customer focus as demonstrated in bid outputs.</p> <p>Demonstrate in a range of contexts how their individual contributions have led to successful outcomes in terms of organisation and time management</p>	Taken a lead and used their own initiative to add value to their business through personal/team development or an implemented / suggested improvement(s) to how their business demonstrates customer focus within their bid documents
		Knowledge test	<p><b>Essay style question</b></p> <p>Failure to demonstrate an understanding of a knowledge area listed within 'Proposal Development'</p>	<p><b>Essay style question</b></p> <p>The apprentice is able to write knowledgeably about:</p> <p>How electronic and portal bid submissions differ from standard submission processes and articulate the key considerations for the bid team</p> <p>How to dissect a bid to identify the customer's key requirements, what to look for, and what actions they would take if they had insufficient information from the tender documents</p>	<p><b>Essay style question</b></p> <p>Provides examples of proposal development and how it is structured / used / applicable within their own business and comment on the effectiveness of these processes</p>	<p><b>Essay style question</b></p> <p>Describes recommended / implemented improvements to their own business environment, with reference to the positive impact this would have / has had in the context of successful bidding practices.</p>

	<ul style="list-style-type: none"> <li>• confidentiality</li> <li>• data protection</li> <li>• competition law</li> <li>• relevant business commercial policy</li> </ul>			<p>The range of tools and methods which could be used to analyse a proposal e.g. SWOT analysis and how they can enhance the overall bid response</p> <p>The importance of handling data correctly, confidentiality, data protection and competition law in line with relevant business commercial policy</p>		
Knowledge Management	<ul style="list-style-type: none"> <li>• The importance of relevant, high quality and up to date content including case studies and evidence</li> <li>• Know how and when to use sensitive and confidential information</li> <li>• Maintaining relevant certificates for registrations, accreditations memberships, frameworks, records and subscriptions</li> </ul>	Professional discussion	Failure to articulate where questioned an understanding of a knowledge area listed within 'Knowledge Management'	Describe how you have analysed and assessed the quality of your own organisation's bid content, including case studies and evidence	Describe the strengths and weaknesses of their own business knowledge management practices	Taken a lead and used their own initiative to add value to their business through personal/team development or an implemented / suggested improvement(s) to how their business manage content
		Knowledge test	<b>Essay style question</b> Failure to demonstrate an understanding of a knowledge area listed within 'Knowledge Management'	<b>Essay style question</b> The apprentice is able to write knowledgeably about: The features of good content, and the importance of good content management for a business and the impact this can have on overall bid quality	<b>Essay style question</b> Provides examples of how content management is structured / used / applicable within their own business and comment on the effectiveness of these processes	<b>Essay style question</b> Describes recommended / implemented improvements to their own business environment, with reference to the positive impact this would have / has had, in the context of successful bidding practices

Roles and responsibilities of the bid team	Understand the roles and responsibilities required for each bid and proposal lifecycle, including: <ul style="list-style-type: none"><li>Bid managers / lead</li><li>Proposal management</li><li>Writers</li><li>Document managers</li><li>Graphics</li><li>Knowledge base managers</li></ul>	Professional discussion	Failure to articulate where questioned an understanding of a knowledge area listed within 'Roles and responsibilities of the bid team'	Describe their understanding of the roles and responsibilities required of the various members of the bid team	Describe the strengths and weaknesses of the roles and responsibilities of bid professionals / colleagues within their own business	Taken a lead and used their own initiative to add value to their business through personal/team development or an implemented / suggested improvement(s) to the roles and responsibilities of bid professionals within their own business
		Knowledge test	<b>Essay style question</b> Failure to demonstrate an understanding of a knowledge area listed within 'Roles and responsibilities of the bid team'	<b>Essay style question</b> The apprentice is able to write knowledgeably about:  Any of the roles as listed in the standard, depicting the key responsibilities and how they fit into the wider bid team	<b>Essay style question</b> Describe examples of how the bid team or department is structured / used / applicable within their own business and comment on the effectiveness of these processes	<b>Essay style question</b> Describes recommended / implemented improvements to their own business environment, with reference to the positive impact this would have / has had in the context of successful bidding practices
<b>SKILLS</b> <b>Professional discussion</b>  This professional questioning should cover a minimum of 3 skill areas. Within each area assessed each question should cover no more than 2 of the requirements against each area. <b>Knowledge test</b>  1 practical written assessment assessing criteria 1 and 2 (bullets 1 and 2) within writing and editorial  Each of the five knowledge areas must be assessed (1 question per knowledge area plus the practical written assessment)					To achieve a Merit, the apprentice must achieve the pass criteria and in addition:	To achieve a Distinction, the apprentice must achieve the pass and Merit criteria, and in addition:
Organisation and planning	<ul style="list-style-type: none"><li>Excellent organisational and time management skills to manage multiple</li></ul>	Professional discussion	Failure to articulate where	Describe how they have organised their time to manage multiple activities	Describe how individual approach to time	Describe how they have taken personal

	<p>activities simultaneously and prioritise own and others' workloads</p> <ul style="list-style-type: none"> <li>• Ability to meet defined deadlines and set own milestones to manage workload</li> <li>• Ability to create and utilise a bid plan timetable and responsibility matrix, supporting virtual team adherence to process</li> <li>• Contribute to proposal project timetable including the timely collection of data from various parties including sub-contractors, consultants and internal subject experts</li> <li>• Ability to meet bid submission deadlines according to guidelines / instructions</li> <li>• Logging and capture of all proposal data in central repository</li> <li>• Able to maintain a healthy work life balance and understand the reasons why it is important to do so</li> <li>• Maintain compliance matrices to ensure compliance to all questions</li> </ul>		<p>questioned, their experiences in:</p> <p>Managing and organising their time effectively including multiple activities simultaneously</p> <p>Setting and meeting bid milestones and deadlines</p> <p>Use of bid plans and other bid tools to manage time and workload effectively</p> <p>Managing expectations and setting realistic timelines</p>	<p>simultaneously and prioritise own and others' workloads.</p> <p>Describe setting of realistic goals and accountabilities to meet defined deadlines and manage workload and maintain a healthy work life balance</p> <p>Describe ability to meet bid submission deadlines according to guidelines / instructions through the use of bid plans, compliance matrices and other tools</p>	<p>management has led to successful outcomes</p> <p>Describe proactivity and ownership for organisation and planning e.g. of meeting logistics and technology</p>	<p>responsibility for achievement of results</p> <p>Taken a lead to improve organisation and planning of bid response document and identified time savings and process improvements</p>
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	<ul style="list-style-type: none"> <li>Capable of managing multiple projects and deadlines</li> </ul>					
Writing and editorial	<ul style="list-style-type: none"> <li>Ability to proof read with an eye for detail</li> <li>Good creative writing skills and good grammar/authoring</li> <li>Collate proposal documents using library/information stores, search engines/corporate directories</li> <li>Ability to use a range of tools, methods and search engines, to analyse and assimilate data, such as competitor analysis or customer research</li> </ul>	Professional discussion  Knowledge Test (Practical written assessment)	Failure to identify errors and inconsistencies with reference to grammar, spelling, formatting and customer reference and tone of voice  Unable to work independently  Inability to collate relevant information from a range of sources	Describe ability to proof read through own examples of annotated bid responses  Describe utilisation of a range of tools, methods and search engines, to analyse and assimilate data  Describe how you have used different methods to collate proposal documents and responses  Describe how you ensure your work meets expectations and is issued accurately before submission  Describe where you have acted on feedback  <b>Practical written assessment:</b>  Able to annotate a piece of written test content to depict:  Grammatical and spelling errors, and formatting improvements  Incorrect or inappropriate reference to the customer	Describe your own and others' strengths and weaknesses and where you have given constructive feedback to improve overall quality  Describe in a range of contexts how individual contributions have led to improved content  <b>Practical written assessment:</b>  In addition to the pass criteria, the apprentice depicts:  Judgement on whether the test content is customer focused and the reasons to explain how they reached this conclusion  Judgement on whether the content is well structured and the reasons to support their conclusion	Taken a lead and used their own initiative to add value to their business through personal/team development or an implemented / suggested improvement(s) to how their business creates, stores, reviews or uses content  <b>Practical written assessment:</b>  In addition to the pass and merit criteria, the apprentice:  Makes recommendations on how the test content could be improved  Makes recommendations on how the test content structure could be improved  Identifies benefits or win themes which could be included within the content that would strengthen the content

				Judgement of whether the questions has been fully answered  Judgement on the tone of voice of the written language (is it consistent and appropriate?)		
Communication	<ul style="list-style-type: none"> <li>Good verbal and written communication skills, and ability to communicate professionally with colleagues at all levels of the business</li> <li>Liaise with sales/legal/finance teams and other virtual team members as necessary</li> </ul>	Professional discussion	<p>Fails to choose effective methods to communicate</p> <p>Communication is unclear, either verbally or in writing</p> <p>Reluctant to engage wider deal team to resolve queries</p>	<p>Describe use of clear verbal and written communication to communicate professionally with colleagues at varying levels of the business</p> <p>Describe engagement with wider deal team to resolve queries</p>	<p>Uses appropriate communication channels dependent on subject matter</p> <p>Actively engages wider deal team, and builds trust with stakeholders</p>	<p>Consistently communicates effectively via a range of methods with colleagues at all levels of the business</p> <p>Answers queries and proactively takes ownership of issue resolution</p> <p>Builds lasting relationships</p>
Customer focus	<ul style="list-style-type: none"> <li>The importance of putting the customer first and tailoring bid documents to their needs, wants and requirements</li> <li>Ability to read customer requirements and understand what information is being requested in bid documents</li> </ul>	Professional discussion	<p>Fails to identify and tailor content to the needs of the customer.</p> <p>Fails to identify customer requirements via bid analysis</p>	<p>Assess own organisation's ability to put the customer first</p> <p>Evaluate bid documents to identify customer and submission instructions</p>	<p>Describe the strengths and weaknesses of their business' ability and approach to putting the customer first and tailoring documents based on your understanding of the customer's requirements</p> <p>Describe how customer requirements have impacted the way in which a bid was written or managed</p>	<p>Describes recommended improvements to their own business environment, with reference to the positive impact this would have / has had in the context of successful bidding practices.</p>



Team working and relationship building	<ul style="list-style-type: none"> <li>• Work and engage with colleagues and virtual teams, leveraging relationships and networks to support information gathering and writing</li> <li>• Build relationships with colleagues and subject matter experts across the business, learning the 'go to' people and how to manage their input</li> <li>• Build rapport and trust</li> </ul>	Professional discussion	<p>Fails to work effectively with others</p> <p>Fails to build effective relationships with subject matter experts</p>	<p>Describe evidence of self-assessment of ability to work and engage with colleagues and virtual teams, leveraging relationships and networks to support information gathering and writing</p> <p>Describe the use of relationships with colleagues and subject matter experts across the business, learning the 'go to' people and how to manage their input</p>	<p>Influences and challenges colleagues and virtual teams to achieve successful outcomes</p> <p>Leverages relationships to managed own and other inputs</p>	<p>Acts as a role model</p> <p>Influences and challenges management, colleagues and virtual teams to achieve successful outcomes</p> <p>Proactively helps and coaches others and demonstrates consistent good performance</p>
<b>BEHAVIOURS</b> <b>Professional Discussion</b> This professional questioning should cover a minimum of 3 behaviours. Within each area assessed each question should cover no more than 2 of the requirements against each area.				To achieve a pass, the apprentice can draw upon evidence from their portfolio to provide examples of the particular behaviour	To achieve a Merit, the apprentice must achieve the pass criteria and in addition:	To achieve a Distinction, the apprentice must achieve the pass and Merit criteria, and in addition:
Initiative	<ul style="list-style-type: none"> <li>• A self-starter, with a desire to succeed</li> <li>• Uses initiative to ensure effective workload management, deadlines and co-ordination of activities</li> </ul>	Professional discussion	Fails to show initiative	<p>Describe a proactive and self-motivated approach</p> <p>Demonstrates effective workload management</p>	Describe where initiative has been used successfully to respond to a particular challenge or issue during a live bid	Taken the lead and used own initiative to add value to their business through suggested improvement to the process on a live bid
Flexibility	<ul style="list-style-type: none"> <li>• Willing to work flexibly to ensure that workload is managed effectively, and deadlines are achieved</li> </ul>	Professional discussion	Fails to show flexibility in their day to day role	Describe how they have implemented a flexible approach to changing circumstances during a live bid, and uses evidence from their	Describe where you have accepted and responded positively to fluctuations in workload, timescales or deadlines, and the impact this had	Where a significant change and/or challenge has occurred, describe the key considerations and actions that you considered to successfully

				portfolio to exemplify their answer	on the results and/or the team.	adapt, and the outcomes that this achieved.
Interpersonal awareness	<ul style="list-style-type: none"> <li>Awareness of self and impact on others</li> <li>Able to work across large and virtual teams</li> </ul>	Professional discussion	Lacks self-awareness  Fails to work well with others	Takes feedback on board  Works well with others  Use evidence from their portfolio to exemplify their answer	Proactively seeks regular feedback and initiates personal change as a result  Works effectively with colleagues at a range of levels across the business	Drives own performance based on constructive feedback  Able to identify and adapt to different personalities to deliver successful outcomes
Results focused	<ul style="list-style-type: none"> <li>A drive to win</li> <li>A desire to go the extra mile to deliver winning bids</li> </ul>	Professional discussion	Lacks drive to win  Fails to show minimum levels of support for winning bids	Describe how you have demonstrated an appetite to win and competitive nature on a particular bid  Use evidence from their portfolio to exemplify their answer	Describe how they have exceeded expectations during the bid process to positively impact the completion of a bid	Consistently go over and above expectations to add value to live bid processes to achieve successful outcomes.
Professionalism	<ul style="list-style-type: none"> <li>Always acts professionally and ethically, protecting confidentiality of the organisation and customers</li> </ul>	Professional discussion	Fails to behave professionally  Fails to follow standards of conduct required by their business	Behaves in a professional way, showing punctuality, respect for others and personal presentation  Follows the standard of conduct required by the organisation	Consistently shows professionalism, punctuality and response for others even in difficult circumstances.  Shows flexibility and ability to adapt conduct, dependent on changing circumstances	Can be relied upon to represent the business and be seen as an ambassador  Seen as a role model to others
Innovation	<ul style="list-style-type: none"> <li>Willingness to continuously look for new and better ways of working, whilst considering the underlining best practice processes</li> </ul>	Professional discussion	Fails to follow minimum standards and processes	Uses tools and skills available to improve existing processes	Describe how individual contributions have led to new and better ways of working	Taken lead and used own initiative to lead new and better ways of working and demonstrate benefits of this approach