ST0313/2.1

DRAFT END-POINT ASSESSMENT PLAN FOR THE PROCUREMENT AND SUPPLY CHAIN PRACTITIONER APPRENTICESHIP

APPRENTICESHIP REFERENCE NUMBER	LEVEL OF THIS END-POINT ASSESSMENT (EPA)	INTEGRATED
ST0313	4	Yes

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Introduction and overview

This document explains the requirements for end-point assessment (EPA) for the procurement and supply chain practitioner apprenticeship. End-point assessment organisations (EPAOs) must follow this when designing and delivering the EPA. Procurement and supply chain practitioner apprentices, their employers and training providers should read this document.

A full-time procurement and supply chain practitioner apprentice typically spends 18 months on-programme. The apprentice must spend at least 12 months on-programme and complete the required amount of off-the-job training in line with the apprenticeship funding rules.

Apprentices must complete a Chartered Institute of Procurement and Supply (CIPS) Level 4 Diploma in Procurement and Supply as part of their apprenticeship.

Before starting EPA, an apprentice must meet the gateway requirements. For this apprenticeship they are:

- the employer must be content that the apprentice is working at or above the occupational standard apprentices must have achieved certain units of the qualification mandated in the senior procurement and supply professional occupational standard ST0313.
- The Apprentice must have completed the CIPS Level 3 Advanced Certificate before entering on the programme.
- The qualification units required by the gateway are:

  CIPS L4 – 7 units towards the CIPS L4 Diploma in Procurement and Supply:

  - o L4M1 Scope and influence of procurement and supply.
  - o L4M2 Defining business need.
  - o L4M3 Commercial contracting.
  - o L4M4 Ethical and responsible sourcing.
  - o L4M5 Commercial negotiation.
  - o L4M6 Supplier relationships.
  - o L4M7 Whole life asset management.

The EPA will assess occupational competence.

An approved EPAO must conduct the EPA for this apprenticeship. Employers must select an approved EPAO from the register of end-point assessment organisations (RoEPAO).

This EPA has 3 assessment methods.

The grades available for each assessment method are below.

Assessment method 1 - presentation with questions:

- fail
- pass
- distinction

Assessment method 2 - interview underpinned by portfolio of evidence:

- fail
- pass
- distinction

Assessment method 3 - case study test:

- fail
- pass
- merit
- distinction

The result from each assessment method is combined to decide the overall apprenticeship grade. The following grades are available for the apprenticeship:

- fail
- pass
- distinction

EPA summary table

On-programme - typically 18 months	The apprentice must: • complete training to develop the knowledge, skills and behaviours (KSBs) outlined in this apprenticeship's standard • complete training towards English and mathematics qualifications in line with the apprenticeship funding rules • compile a portfolio of evidence • complete training towards the qualification listed in the procurement and supply chain practitioner apprenticeship standard ST0313. The qualification required is: CIPS L4 Diploma in Procurement and Supply
End-point assessment gateway	The apprentice's employer must be content that the apprentice has attained sufficient KSBs to complete the apprenticeship. The apprentice's employer must confirm that they think the apprentice: • is working at or above the occupational standard as a procurement and supply chain practitioner • has the evidence required to pass the gateway and is ready to take the EPA The apprentice must: • confirm they are ready to take the EPA • have achieved English and mathematics qualifications in line with the apprenticeship funding rules • have completed and passed units L4M1 Scope and influence of procurement and supply, L4M2 Defining business need, L4M3 Commercial contracting, L4M4 Ethical and responsible sourcing, L4M5 Commercial negotiation, L4M6 Supplier relationships, and L4M7 Whole life asset management of the CIPS L4 Diploma in Procurement and Supply. For the interview underpinned by portfolio of evidence, the apprentice must submit a portfolio of evidence. Gateway evidence must be submitted to the EPAO along with any organisation specific policies and procedures requested by the EPAO.
End-point assessment - typically 4 months	**The grades available for each assessment method are below** Presentation with questions:

	• fail • pass • distinction Interview underpinned by portfolio of evidence: • fail • pass • distinction Case Study Test: • fail • pass • merit • distinction **Overall EPA and apprenticeship can be graded:** ○ fail ○ pass ○ distinction
Professional recognition	This apprenticeship aligns with: • Chartered Institute of Procurement and Supply for Diploma Membership
Re-sits and re-takes	• re-take and re-sit grade cap: pass • re-sit timeframe: typically 2 months • re-take timeframe: typically 3 months

Duration of end-point assessment period

The EPA is taken in the EPA period. The EPA period starts when the EPAO confirms the gateway requirements have been met and is typically 4 months.
The EPAO should confirm the gateway requirements have been met and start the EPA as quickly as possible.

EPA gateway

Gateway should only start once the employer is confident that the apprentice is occupationally competent. That is, they are deemed to be working at or above the level set out in the occupational standard and ready to undertake an EPA. The employer may take advice from the apprentice's training provider, but the employer must make the decision. The apprentice will then enter the gateway.

The apprentice must meet the gateway requirements before starting their EPA.

The apprentice's employer must confirm that they think the apprentice:

- is working at or above the occupational standard as a procurement and supply chain practitioner
- has the evidence required to pass the gateway and is ready to take the EPA

The apprentice must:

- confirm they are ready to take the EPA
- have achieved English and mathematics qualifications in line with the apprenticeship funding rules
- completed and passed units L4M1 Scope and influence of procurement and supply, L4M2 Defining business need, L4M3 Commercial contracting, L4M4 Ethical and responsible sourcing, L4M5 Commercial negotiation, L4M6 Supplier relationships, and L4M7 Whole life asset management of the CIPS L4 Diploma in Procurement and Supply

Unit L4M8 Procurement and supply in practice, of the CIPS Level 4 Diploma in Procurement and Supply is mapped to the apprenticeship EPA case study test assessment method and corresponding KSBs.

An apprentice may not therefore take unit L4M8 from the CIPS Level 4 Diploma in Procurement and Supply before the gateway. In the unlikely event that. If an apprentice has achieved this unit prior to starting the apprenticeship, this would exclude them from undertaking the apprenticeship.

Any person who believes they have prior learning is advised to check their eligibility for the apprenticeship via guidance found here:
https://www.gov.uk/government/publications/apprenticeships-recognition-of-priorlearning/apprenticeships-initial-assessment-to-recognise-prior-learning

- submit a portfolio of evidence for the interview underpinned by portfolio of evidence

Portfolio of evidence requirements:
The apprentice must compile a portfolio of evidence during the on-programme period of the apprenticeship. It should only contain evidence related to the KSBs that will be assessed the interview. It will typically contain 16 discrete pieces of evidence. Evidence must be mapped against the KSBs. Evidence may be used to demonstrate more than one KSB; a qualitative as opposed to quantitative approach is suggested.
Evidence sources may include:

- workplace documentation and records, for example:
- workplace policies and procedures
- witness statements
- annotated photographs
- video clips with a maximum total duration 10 minutes; the apprentice must be in view and identifiable

This is not a definitive list; other evidence sources can be included.

The portfolio of evidence should not include reflective accounts or any methods of self-assessment. Any employer contributions should focus on direct observation of performance, for example, witness statements, rather than opinions. The evidence provided should be valid and attributable to the apprentice; the portfolio of evidence should contain a statement from the employer and apprentice confirming this.

The EPAO should not assess the portfolio of evidence directly as it underpins the **interview**. The independent assessor should review the portfolio of evidence to prepare questions for the **interview**. They are not required to provide feedback after this review.

The apprentice must submit the gateway evidence to their EPAO, including any organisation specific policies and procedures requested by the EPAO.

Order of assessment methods

The assessment methods must be delivered in the following order:

The assessment methods must be delivered in the following order:

- presentation with questions
- interview underpinned by a portfolio of evidence
- case study test

The rationale is to ensure that the mandated CIPS qualification is completed at the same time as the end-point assessment and an individual cannot complete the mandated qualification and withdraw from completing end-point assessment.

Presentation with questions

Overview

In the presentation with questions, the apprentice delivers a presentation to an independent assessor on a set subject. The independent assessor must ask questions after the presentation. It gives the apprentice the opportunity to demonstrate the KSBs mapped to this assessment method.

Rationale

This assessment method is being used because:

- Setting the presentation title post-gateway ensures the reliability and validity of the EPA, and the period between the apprentice's submission and the actual assessment, allows the independent assessor to prepare appropriate questions pertinent to the presentation.
- The presentation will allow the apprentice to demonstrate their knowledge, skills and behaviours relating to the KSBs assigned to this assessment method, allowing the independent assessor to draw these out, and to assess performance against the distinction criteria. Questions and answers following the presentation must seek to assess KSBs not evidenced through the presentation and depth of understanding to assess performance against the distinction criteria.

Delivery

The presentation with questions must be structured to give the apprentice the opportunity to demonstrate the KSBs mapped to this assessment method to the highest available grade.
An independent assessor must conduct and assess the presentation with questions.
The presentation must cover:

- present on a project or programme that you have led or contributed to. please define your personal role in the project, your approach to the wider project including any challenges you came across, and the impact your contribution had on the project.
- present on a tendering project you have led or contributed to. define the stages you were involved in from planning and market engagement, through tendering to contract implementation.
- present on a project that you have led or contributed to which had a distinct social value or sustainability element. please define your personal role in the project and

your approach to implementing social value and sustainability. what was the resulting benefit?

As well as the above topics, the EPAO can add further topic areas, provided they cover the relevant KSBs and give adequate opportunity for the apprentice to meet grading descriptors.

The purpose of the presentation is to allow the apprentice to demonstrate their competence against the grading descriptors.

The apprentice must submit any presentation materials to the EPAO by the end of week 4 of the EPA period. The apprentice must notify the EPAO, at that point, of any technical requirements for the presentation.
During the presentation, the apprentice must have access to:

- audio-visual presentation equipment
- flip chart and writing and drawing materials
- computer
- any other requirements as previously notified to the EPAO.

The independent assessor must have at least 2 weeks to review any presentation materials, before the presentation is delivered by the apprentice, to allow them to prepare questions.
The EPAO must give the apprentice at least 1 weeks' notice of the presentation assessment.
The independent assessor must ask questions after the presentation.

The purpose of the questions is to confirm the apprentice's understanding of the presentation and how it demonstrates the relevant knowledge, skills, and behaviours.
The presentation and questions must last 45 minutes. This will typically include a presentation of 20 minutes and questioning lasting 25 minutes. The independent assessor must use the full time available for questioning. The independent assessor can increase the total time of the presentation and questioning by up to 10%. This time is to allow the apprentice to complete their last point or respond to a question if necessary.
The independent assessor must ask at least 6 questions. They must use the questions from the EPAO's question bank or create their own questions in line with the EPAO's training. Follow up questions are allowed where clarification is required.

The independent assessor must make the grading decision. The independent assessor must assess the presentation and answers to questions holistically when deciding the grade.
The independent assessor must keep accurate records of the assessment. They must record:

- the KSBs demonstrated
- the apprentice's answers to questions
- the KSBs demonstrated in answers to questions
- the grade achieved

Assessment location

The presentation with questions must take place in a suitable venue selected by the EPAO for example, the EPAO's or employer's premises. The presentation with questions should take place in a quiet room, free from distractions and influence.

Question and resource development

The EPAO must develop a purpose-built assessment specification and question bank. It is recommended this is done in consultation with employers of this occupation. The EPAO

must maintain the security and confidentiality of EPA materials when consulting with employers. The assessment specification and question bank must be reviewed at least once a year to ensure they remain fit-for-purpose.

The assessment specification must be relevant to the occupation and demonstrate how to assess the KSBs mapped to this assessment method. The EPAO must ensure that questions are refined and developed to a high standard. The questions must be unpredictable. A question bank of sufficient size will support this.
The EPAO must ensure that the apprentice has a different set of questions in the case of re-sits or re-takes.
The EPAO must produce the following materials to support the presentation with questions:

- independent assessor EPA materials which include:
    - training materials
    - administration materials
    - moderation and standardisation materials
    - guidance materials
    - grading guidance
    - question bank
- EPA guidance for the apprentice and the employer

The EPAO must ensure that the EPA materials are subject to quality assurance procedures including standardisation and moderation.

Interview underpinned by portfolio of evidence

Overview

In the interview, an independent assessor asks the apprentice questions. It gives the apprentice the opportunity to demonstrate the KSBs mapped to this assessment method. The apprentice can refer to and illustrate their answers with evidence from their portfolio of evidence.

Rationale

This assessment method is being used because:

- it allows the apprentice to be assessed against KSBs that may not naturally occur as part of a case study or presentation
- it allows the apprentice to show case their depth of understanding relating to the KSBs
- it allows the independent assessor to consider the context and sector that the apprentice operates within, giving flexibility to ensure that all the KSBs can be assessed appropriately
- it is cost effective, and it allows consideration of the potential need to conduct the EPA remotely.

Delivery

The interview must be structured to give the apprentice the opportunity to demonstrate the KSBs mapped to this assessment method to the highest available grade.
An independent assessor must conduct and assess the interview.

The purpose is to assess the apprentice's competence against the following themes:

- infrastructure and governance
- financial management
- procurement and supply chain outcomes
- management of procurement and the supply chain
- sustainability
- development of team and individual

The EPAO must give an apprentice 2 weeks' notice of the interview.
The independent assessor must have at least 2 weeks to review the supporting documentation.

The apprentice must have access to their portfolio of evidence during the interview.
The apprentice can refer to and illustrate their answers with evidence from their portfolio of evidence however, the portfolio of evidence is not directly assessed.
The interview must last for 60 minutes. The independent assessor can increase the time of the interview by up to 10%. This time is to allow the apprentice to respond to a question if necessary.

The independent assessor must ask at least 6 questions. The independent assessor must use the questions from the EPAO's question bank or create their own questions in line with the EPAO's training. Follow-up questions are allowed where clarification is required.
The independent assessor must make the grading decision.
The independent assessor must keep accurate records of the assessment. They must record:

- the apprentice's answers to questions
- the KSBs demonstrated in answers to questions
- the grade achieved

Assessment location

The interview must take place in a suitable venue selected by the EPAO for example, the EPAO's or employer's premises.
The interview can be conducted by video conferencing. 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 take place in a quiet room, free from distractions and influence.

Question and resource development

The EPAO must develop a purpose-built assessment specification and question bank. It is recommended this is done in consultation with employers of this occupation. The EPAO must maintain the security and confidentiality of EPA materials when consulting with employers. The assessment specification and question bank must be reviewed at least once a year to ensure they remain fit-for-purpose.

The assessment specification must be relevant to the occupation and demonstrate how to assess the KSBs mapped to this assessment method. The EPAO must ensure that questions are refined and developed to a high standard. The questions must be unpredictable. A question bank of sufficient size will support this.
The EPAO must ensure that the apprentice has a different set of questions in the case of re-sits or re-takes.
The EPAO must produce the following materials to support the interview underpinned by portfolio of evidence:

- independent assessor assessment materials which include:
    - training materials
    - administration materials
    - moderation and standardisation materials
    - guidance materials
    - grading guidance
    - question bank
- EPA guidance for the apprentice and the employer

The EPAO must ensure that the EPA materials are subject to quality assurance procedures including standardisation and moderation.

Case Study Test

Overview

In the case study test, the apprentice answers questions in a controlled and invigilated environment. It gives the apprentice the opportunity to demonstrate the knowledge mapped to this assessment method.

The case study test can be delivered at Study Centres, Exam Venues (internal invigilation) or via Remote Invigilation (external invigilation) at home or at a place of work. The subject of the case study test is different for each exam period, and currently there are four exam periods throughout a 12-month period (March, May, July, and November). The case study test involves the apprentice being presented with four essay style questions with each covering one learning objective (Learning objectives 1.0, 2.0, 3.0 and 4.0). Details of these are as follows:

Learning objective 1.0 Demonstrate the application of the procurement cycle. 1.1 Apply the key stages of the procurement cycle to the practical procurement and supply environment. (The practical application of the CIPS procurement cycle) Learning objective

Learning objectives 2.0 Demonstrate the application of the key stages of the sourcing process. 2.1 Apply the key stages of the sourcing process to the practical procurement and supply environment. (Stages of the sourcing process)

Learning objective 3.0 Demonstrate the application of whole life asset management. 3.1 Apply whole life asset management to the practical procurement and supply environment.

Learning objective 4.0 Demonstrate the application of ethical and responsible sourcing within an organisation. 4.1 Apply ethical and responsible sourcing to the practical procurement and supply environment.

Long answer questions (LAQs) are open-ended questions used to assess depth of knowledge in an examination. LAQs require an extended factual interpretive (application of concepts or knowledge) and or evaluative answer.

Rationale

This assessment method is being used because:

- it provides an opportunity to test the apprentice's ability to diagnose procurement and supply situations and identify appropriate outcomes. This is part of the final exam for the Chartered Institute of Procurement and Supply (CIPS) Level 4 Diploma in Procurement and Supply
- it complements the other two assessment methods. In the professional discussion, the apprentice must relate their answers to their real-work experience, and the presentation with questions involves fact-based knowledge and skills recall. This third method of assessment provides for assurance of competency by testing the apprentice's reactions to detailed and hypothetical circumstances
- it is delivered as an online case study test exam, recognising this is the senior level to the occupation, and employers' own experiences that apprentice procurement and supply chain practitioners will be suited to answering questions about case scenarios.

Delivery

The case study test must be structured to give the apprentice the opportunity to demonstrate the knowledge mapped to this assessment method to the highest available grade.
The case study test must be computer or paper based.

The apprentice must be given at least 2 weeks' notice of the date and time of the case study test.
The case study test must consist of 4 long answer questions. Long answer questions need a written response. Responses to LAQs may be multiple lines, an approximate word count (such as 100 words), multiple paragraphs. This should be an extended writing opportunity for higher marked questions.

Test administration

The apprentice must have 180 minutes to complete the case study test.
The case study test is closed book which means that the apprentice cannot refer to reference books or materials whilst taking the case study test.
The case study test must be taken in the presence of an invigilator who is the responsibility of the EPAO. The EPAO must have an invigilation policy setting out how the case study test must be conducted. It must state the ratio of apprentices to invigilators for the setting and allow the case study test to take place in a secure way.

The EPAO must verify the apprentice's identity and ensure invigilation of the apprentice for example, with 360-degree cameras and screen sharing facilities.

The EPAO is responsible for the security of the case study test including the arrangements for on-line testing. The EPAO must ensure that their security arrangements maintain the validity and reliability of the case study test.

Marking

CIPS must develop a marking scheme based on the grading descriptors for this assessment method. The case study test must be marked by an independent assessor or marker employed by CIPS. They must follow the marking scheme produced by CIPS.
Any incorrect or missing answers get zero marks.

CIPS have a marking scheme for this assessment method as follows:

- Fail (the individual doesn't meet the pass criteria) – 24 marks or less
- Pass - individual has achieved 25-29 marks
- Merit – individual has achieved 30-37 marks
- Distinction – individual has achieved 38 or more marks

CIPS is responsible for overseeing the marking of the case study test. CIPS must ensure standardisation and moderation of tests with written answers.

Assessment location

The apprentice must take the case study test in a suitably controlled and invigilated environment that is a quiet room, free from distractions and influence. The EPAO must check the venue is suitable.

The case study test could take place remotely if the appropriate technology and systems are in place to prevent malpractice.

Question and resource development

CIPS must develop a purpose-built assessment specification and question bank. CIPS should maintain the security and confidentiality of EPA materials when consulting with employers. The assessment specification and question bank must be reviewed at least once a year to ensure they remain fit-for-purpose.

The assessment specification must be relevant to the occupation and demonstrate how to assess the KSBs mapped to this assessment method. CIPS must ensure that questions are refined and developed to a high standard. The questions must be unpredictable. A question bank of sufficient size will support this.

CIPS must ensure that the apprentice has a different set of questions in the case of re-sits or re-takes.

CIPS must produce the following materials to support the case study test:

- independent assessor assessment materials which include:

    - training materials
    - administration materials
    - moderation and standardisation materials
    - guidance materials
    - grading guidance
    - test specification
    - sample test and mark schemes
    - live tests and mark schemes
    - question bank
- EPA guidance for the apprentice and the employer

CIPS must ensure that the EPA materials are subject to quality assurance procedures including standardisation and moderation.

Grading

Presentation with questions

Fail - does not meet pass criteria

THEME KSBS	PASS APPRENTICES MUST DEMONSTRATE ALL OF THE PASS DESCRIPTORS	DISTINCTION APPRENTICES MUST DEMONSTRATE ALL OF THE PASS DESCRIPTORS AND ALL OF THE DISTINCTION DESCRIPTORS
Procurement and supply chain outcomes K18 K19 K26 S2 S12 S21	Takes responsibility for interpreting business requirements by assessing demand for products or services using their category specific knowledge of contracts, market and legislative requirements based on their analysis and evaluation of data and intelligence to support decision making, ensuring goods or services are procured in a compliant and sustainable way (K18, S2, S21). Explains their approach to monitoring and managing contract performance with reference to their use of project management tools to conduct planning and forecasting to ensure they meet time, costs, service, and quality objectives (K19, K26, S12).	Evidence how their analysis and evaluation of data has ensured that contracts are managed within time, costs, service, and quality objectives (S12, S21).
Stakeholder engagement S1 B1 B3	Explains how they have managed stakeholder relationships by taking responsibility to ensure ethical practices when working with others to reach a positive outcome (S1, B1, B3).	Justifies their approach to developing and maintaining collaborative stakeholder relationships including how this has contributed to ethical behaviour and practices (S1, B1, B3).
Financial management K5 S4 S9	Describes how financial models are applied to influence customer and supplier behaviour, explaining how they conduct benchmarking to evaluate costs and identify cost saving opportunities when analysing the financial implications of their decisions (K5, S4, S9).	N/A
Local, global, and sustainable	Describes the strategies they use to collect and utilise intelligence to support the	N/A

THEME KSBS	PASS APPRENTICES MUST DEMONSTRATE ALL OF THE PASS DESCRIPTORS	DISTINCTION APPRENTICES MUST DEMONSTRATE ALL OF THE PASS DESCRIPTORS AND ALL OF THE DISTINCTION DESCRIPTORS
sourcing strategies K3 K4 K11 S5 B4	development of business cases that optimise the procurement process. (K3, K4) Explains how ethical and sustainable risks and opportunities are related to sourcing decisions and how they prepare or contribute to the drafting of a sourcing plan which meets both business needs and considers the "big" picture together (, K11, S5, B4).	
Innovation tools and techniques K24 S15 S20	Identifies the extent to which IT, software, quality systems, and improvement methodologies, are used to communicate information and improvement within the procurement and contract management process (K24, S15, S20).	Demonstrates a strong understanding of a range of technologies and how they can benefit their organisation (K24, S20).
Negotiation and risk management S16 S17	Facilitates discussions with stakeholders to resolve any issues or risks while analysing sustainability challenges and risks at each stage of the process (S16, S17).	Justifies the approach they have taken with stakeholders to resolve any issues or risks identified at each stage of the process (S16, S17).

Interview underpinned by portfolio of evidence

Fail - does not meet pass criteria

THEME KSBS	PASS APPRENTICES MUST DEMONSTRATE ALL OF THE PASS DESCRIPTORS	DISTINCTION APPRENTICES MUST DEMONSTRATE ALL OF THE PASS DESCRIPTORS AND ALL OF THE DISTINCTION DESCRIPTORS
Infrastructure and governance K15 S11	Interprets the organisation's commercial strategy, policies and processes that impact on procurement and supply chain management and describes the actions they take to support	Evaluates the extent to which the methods used to support contract award have met organisation

THEME KSBS	PASS APPRENTICES MUST DEMONSTRATE ALL OF THE PASS DESCRIPTORS	DISTINCTION APPRENTICES MUST DEMONSTRATE ALL OF THE PASS DESCRIPTORS AND ALL OF THE DISTINCTION DESCRIPTORS
	contract award and supplier briefing in line with these processes and governance (K15, S11).	processes and policies (K5, S11).
Financial management K1 K7	Describes the procurement lifecycles and the importance of collaboration between procurement and other functions to ensure they fit into the organisation's structure and budgets (K1, K7).	Critically evaluates procurement lifecycles and how this has improved collaboration between functions (K1, K7).
Procurement and supply chain outcomes K8 S6 S8 S10	Explains the tools and techniques used to create solutions into business objectives and procurement specifications, and how they are used in the selection and award criteria and how supplier bids are evaluated against them (K8, S8). Describe the documentation used for the supply of goods and services (S6). Analyses how they liaise and negotiate with suppliers and stakeholders to ensure timely delivery of purchased goods and services (S10).	Justifies the tools and techniques used and improvements made to the selection and award criteria and how supplier bids are evaluated against them whilst making recommendations for further change (K8, S8).
Management of procurement and the supply chain K6 K9 K13 K14 K21 K22 K23 S3 S7 S13 S14 S18 S19 B5 B6	Influences the contract award process using negotiation techniques to reach agreement and notify suppliers of proposal requirements (K14, K23, S7). Describe the role of the procurement cycle and how they use it to deliver,	Critically analyses their use of the procurement and supply chain cycle s and the longer-term impact of these on aligning with the overall commercial contract process (K21, K23).

THEME KSBS	PASS APPRENTICES MUST DEMONSTRATE ALL OF THE PASS DESCRIPTORS	DISTINCTION APPRENTICES MUST DEMONSTRATE ALL OF THE PASS DESCRIPTORS AND ALL OF THE DISTINCTION DESCRIPTORS
	continuously improve and align with achieving efficiencies and continuous improvement to manage contract performance and maintain contract documentation (K6, K21, S13, S14, S19). Describes the principles and purpose of commercial contracting, and documentation and terminology that form part of the commercial contract process such as the contract and its appendices and how they work collaboratively and flexibly to meet these (K9, K13, B5, B6). Explains the digital and software tools available in procurement and how they are used to undertake market analysis to establish potential routes to market and manage information in accordance with company policy and process (K22, S3, S18).	
Sustainability K12 K25 S22	Describe how they use procurement to drive "social value" and sustainability when managing contracts and diverse suppliers (K12). Identifies current and future needs of the sector and procurement landscape and make suggestions for future change underpinned by horizon scanning (K25, S22).	Critically evaluates their use of horizon scanning in identifying change which has transformed the procurement services of their organisation (K25, S22).

THEME KSBS	PASS APPRENTICES MUST DEMONSTRATE ALL OF THE PASS DESCRIPTORS	DISTINCTION APPRENTICES MUST DEMONSTRATE ALL OF THE PASS DESCRIPTORS AND ALL OF THE DISTINCTION DESCRIPTORS
Development of the team and individual B2	Identifies learning and development needs, and improvement opportunities, for themselves, to enable both personal and professional development (B2).	N/A

Case Study Test

Fail - does not meet pass criteria

THEME KSBS	PASS APPRENTICES MUST DEMONSTRATE THE FOLLOWING	MERIT APPRENTICES MUST DEMONSTRATE THE FOLLOWING	DISTINCTION APPRENTICES MUST DEMONSTRATE THE FOLLOWING
Case study test K2 K10 K16 K17 K20	Apprentice has achieved 25 - 29 marks.	Apprentice has achieved 30 – 37 marks.	Apprentices has achieved 38 or more marks.

Overall EPA grading

Performance in the EPA determines the overall grade of:

- fail
- pass
- distinction

An independent assessor must individually grade the presentation with questions, interview underpinned by portfolio of evidence and case study test in line with this EPA plan.

The EPAO must combine the individual assessment method grades to determine the overall EPA grade.

If the apprentice fails one assessment method or more, they will be awarded an overall fail.

To achieve an overall pass, the apprentice must achieve at least a pass in all the assessment methods, or a merit in the case study test.
To achieve an overall EPA distinction, the apprentice must achieve a distinction in all the assessment methods, or a merit in the case study test.

Grades from individual assessment methods must be combined in the following way to determine the grade of the EPA overall.

PRESENTATION WITH QUESTIONS	INTERVIEW UNDERPINNED BY PORTFOLIO OF EVIDENCE	CASE STUDY TEST	OVERALL GRADING
Any grade	Fail	Fail	Fail
Fail	Any grade	Fail	Fail
Pass	Pass	Merit	Pass
Pass	Pass	Pass	Pass
Distinction	Pass	Pass	Pass
Pass	Distinction	Pass	Pass
Pass	Pass	Distinction	Pass
Pass	Pass	Merit	Pass
Distinction	Distinction	Merit	Pass
Distinction	Distinction	Distinction	Distinction

Re-sits and re-takes

If the apprentice fails one assessment method or more, (including the CIPS case study test) they can take a re-sit or a re-take at their employer's discretion. The apprentice's employer needs to agree that a re-sit or re-take is appropriate. A re-sit does not need further learning, whereas a re-take does. The apprentice should have a supportive action plan to prepare for a re-sit or a re-take.

The employer and the EPAO should agree the timescale for a re-sit or re-take. 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 3 months of the EPA outcome notification.

If the apprentice fails the presentation with questions assessment method, they will be given a new subject to deliver a presentation on. Failed assessment methods must be re-sat or re-taken within a 6-month period from the EPA outcome notification, otherwise the entire EPA will need to be re-sat or re-taken in full.

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

The apprentice will get a maximum EPA grade of pass for a re-sit or re-take, unless the EPAO determines there are exceptional circumstances.

Roles and responsibilities

ROLES	RESPONSIBILITIES
Apprentice	As a minimum, the apprentice should: • complete on-programme training to meet the KSBs as outlined in the apprenticeship standard for a minimum of 12 months • complete the required amount of off-the-job training specified by the apprenticeship funding rules and as arranged by the employer and training provider • understand the purpose and importance of EPA • prepare for and undertake the EPA including meeting all gateway requirements
Employer	As a minimum, the apprentice's employer must: • select the EPAO and training provider • work with the training provider, where applicable, to support the apprentice in the workplace and to provide the opportunities for the apprentice to develop the KSBs • arrange and support off-the-job training to be undertaken by the apprentice • decide when the apprentice is working at or above the apprenticeship standard and is ready for EPA • ensure the apprentice is prepared for the EPA • ensure that all supporting evidence required at the gateway is submitted in line with this EPA plan • confirm arrangements with the EPAO for the EPA in a timely manner, including who, when, where • provide the EPAO with access to any employer-specific documentation as required for example, company policies • ensure that the EPA is scheduled with the EPAO for a date and time which allows appropriate opportunity for the apprentice to meet the KSBs • ensure the apprentice is given sufficient time away from regular duties to prepare for, and complete the EPA • ensure that any required supervision during the EPA period, as stated within this EPA plan, is in place

ROLES	RESPONSIBILITIES
	• ensure the apprentice has access to the resources used to fulfil their role and carry out the EPA for workplace based assessments • remain independent from the delivery of the EPA • pass the certificate to the apprentice upon receipt
EPAO	As a minimum, the EPAO must: • conform to the requirements of this EPA plan and deliver its requirements in a timely manner • conform to the requirements of the apprenticeship provider and assessment register • conform to the requirements of the external quality assurance provider (EQAP) • understand the apprenticeship including the occupational standard and EPA plan • make all necessary contractual arrangements including agreeing the price of the EPA • develop and produce assessment materials including specifications and marking materials, for example mark schemes, practice materials, training material • maintain and apply a policy for the declaration and management of conflict of interests and independence. This must ensure, as a minimum, there is no personal benefit or detriment for those delivering the EPA or from the result of an assessment. It must cover: o apprentices o employers o independent assessors o any other roles involved in delivery or grading of the EPA • have quality assurance systems and procedures that ensure fair, reliable and consistent assessment and maintain records of internal quality assurance (IQA) activity for external quality assurance (EQA) purposes • appoint independent, competent, and suitably qualified assessors in line with the requirements of this EPA plan • appoint administrators, invigilators and any other roles where required to facilitate the EPA • deliver induction, initial and on-going training for all their independent assessors and any other roles

ROLES	RESPONSIBILITIES
	involved in the delivery or grading of the EPA as specified within this EPA plan. This should include how to record the rationale and evidence for grading decisions where required • conduct standardisation with all their independent assessors before allowing them to deliver an EPA, when the EPA is updated, and at least once a year • conduct moderation across all of their independent assessors' decisions once EPAs have started according to a sampling plan, with associated risk rating of independent assessors • monitor the performance of all their independent assessors and provide additional training where necessary • develop and provide assessment recording documentation to ensure a clear and auditable process is in place for providing assessment decisions and feedback to all relevant stakeholders • use language in the development and delivery of the EPA that is appropriate to the level of the apprenticeship • arrange for the EPA to take place in a timely manner, in consultation with the employer • provide information, advice, and guidance documentation to enable apprentices, employers and training providers to prepare for the EPA • confirm the gateway requirements have been met before they start the EPA for an apprentice • arrange a suitable venue for the EPA • maintain the security of the EPA including, but not limited to, verifying the identity of the apprentice, invigilation and security of materials • where the EPA plan permits assessment away from the workplace, ensure that the apprentice has access to the required resources and liaise with the employer to agree this if necessary • confirm the overall grade awarded • maintain and apply a policy for conducting appeals
Independent assessor	As a minimum, an independent assessor must: • be independent, with no conflict of interest with the apprentice, their employer or training provider,

ROLES	RESPONSIBILITIES
	specifically, they must not receive a personal benefit or detriment from the result of the assessment • have, maintain and be able to evidence up-to-date knowledge and expertise of the occupation • have the competence to assess the EPA and meet the requirements of the IQA section of this EPA plan • understand the apprenticeship's occupational standard and EPA plan • attend induction and standardisation events before they conduct an EPA for the first time, when the EPA is updated, and at least once a year • use language in the delivery of the EPA that is appropriate to the level of the apprenticeship • work with other personnel, where used, in the preparation and delivery of assessment methods • conduct the EPA to assess the apprentice against the KSBs and in line with the EPA plan • make final grading decisions in line with this EPA plan • record and report assessment outcome decisions • comply with the IQA requirements of the EPAO • comply with external quality assurance (EQA) requirements
Training provider	As a minimum, the training provider must: • conform to the requirements of the apprenticeship provider and assessment register • ensure procedures are in place to mitigate against any conflict of interest • work with the employer and support the apprentice during the off-the-job training to provide the opportunities to develop the KSBs as outlined in the occupational standard • deliver training to the apprentice as outlined in their apprenticeship agreement • monitor the apprentice's progress during any training provider led on-programme learning • ensure the apprentice is prepared for the EPA

ROLES	RESPONSIBILITIES
	• advise the employer, upon request, on the apprentice's readiness for EPA • ensure that all supporting evidence required at the gateway is submitted in line with this EPA plan • remain independent from the delivery of the EPA
Marker	As a minimum, the marker must: • attend induction training as directed by the EPAO • have no direct connection or conflict of interest with the apprentice, their employer or training provider • mark test answers in line with the EPAO's mark scheme and procedures
Invigilator	As a minimum, the invigilator must: • attend induction training as directed by the EPAO • not invigilate an assessment, solely, if they have delivered the assessed content to the apprentice • invigilate and supervise the apprentice during tests and in breaks during assessment methods to prevent malpractice in line with the EPAO's invigilation procedures

Reasonable adjustments

The EPAO must have reasonable adjustments arrangements for the EPA.

This should include:

- how an apprentice qualifies for reasonable adjustment
- what reasonable adjustments may be made

Adjustments must maintain the validity, reliability and integrity of the EPA as outlined in this EPA plan.

Internal quality assurance

Internal quality assurance refers to the strategies, policies, and procedures that an EPAO must have in place to ensure valid, consistent and reliable EPA decisions.

EPAOs for this EPA must adhere to the requirements within the roles and responsibilities table.

They must also appoint independent assessors who:

- have recent relevant experience of the occupation or sector to at least occupational level 6 gained in the last 3 years or significant experience of the occupation or sector

Value for money

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

- completing applicable assessment methods online, for example computer-based assessment
- utilising digital remote platforms to conduct applicable assessment methods
- assessing multiple apprentices simultaneously where the assessment method permits this
- using the employer's premises
- conducting assessment methods on the same day

Professional recognition

This apprenticeship aligns with:

- Chartered Institute of Procurement and Supply for Diploma Membership

Mapping of KSBs to assessment methods

KNOWLEDGE	ASSESSMENT METHODS
K1 Procurement life cycles and how they fit into the organisation's structure and budgets.	Interview underpinned by portfolio of evidence
K2 Relevant regulations and legislation such as procurement, data protection, environmental, social and governance, and how they impact on the procurement process.	Case Study Test
K3 Collect and utilise market, supplier, and product intelligence to inform business strategies and optimise the procurement process.	Presentation with questions
K4 Market and product intelligence and supplier innovation support the development of business cases.	Presentation with questions
K5 How commercial models are applied to generate the best value for the organisation, and how they influence customer and supplier behaviour.	Presentation with questions
K6 The principles of achieving efficiencies and continuous improvement.	Interview underpinned by portfolio of evidence
K7 The importance of collaboration between the Procurement, Finance, and other business functions.	Interview underpinned by portfolio of evidence
K8 Incorporate business objectives and needs into procurement specifications by utilising tools and techniques to create solutions.	Interview underpinned by portfolio of evidence
K9 The principles and purpose of commercial contracting.	Interview underpinned by portfolio of evidence
K10 How contract terms, conditions and obligations affect delivery, supplier performance and outcomes for the organisation.	Case Study Test

KNOWLEDGE	ASSESSMENT METHODS
K11 Ethical and sustainability risks and opportunities related to sourcing decisions.	Presentation with questions
K12 The use of procurement to drive "social value" and sustainability, such as emissions reduction, use of diverse suppliers (SMEs, BAME owned firms), addressing human rights in the supply chain, and combatting environmental harm.	Interview underpinned by portfolio of evidence
K13 The documentation and terminology that form part of the commercial contract process such as the contract and its appendices.	Interview underpinned by portfolio of evidence
K14 The procurement negotiation techniques required to reach a mutually beneficial agreement.	Interview underpinned by portfolio of evidence
K15 The organisation's commercial strategy and policies, procedures, and governance processes.	Interview underpinned by portfolio of evidence
K16 Principles and purpose of the organisations contract governance, risk management, and internal controls.	Case Study Test
K17 Supplier performance monitoring, management, and reporting techniques which impact on, service, quality, and sustainability objectives.	Case Study Test
K18 Category specific knowledge of contracts, market, and legislative requirements to ensure goods or services are procured in a compliant and sustainable way.	Presentation with questions
K19 Conduct planning and forecasting which support the business decisions and the delivery of procurement.	Presentation with questions
K20 Analyse spend data and generate recommendations to feed into business and commercial strategies.	Case Study Test

KNOWLEDGE	ASSESSMENT METHODS
K21 The components, benefits, and constraints of taking a category management approach throughout the procurement life cycle.	Interview underpinned by portfolio of evidence
K22 The digital and software tools used in procurement and supply chain management, such as “source to contract” platforms, supply chain finance tools, complex sourcing, and auctions, spend analytics, AI, risk tools and guided buying.	Interview underpinned by portfolio of evidence
K23 The organisation's contract award process.	Interview underpinned by portfolio of evidence
K24 The principles of continuous improvement and how to identify and implement opportunities for improvement within the procurement and contract management process.	Presentation with questions
K25 The use of horizon scanning to identify the current and future needs of the sector and procurement landscape.	Interview underpinned by portfolio of evidence
K26 Project management tools and techniques.	Presentation with questions
SKILL	**ASSESSMENT METHODS**
S1 Manage relationships with stakeholders.	Presentation with questions
S2 Interpret business requirements by assessing the demand for the product or service.	Presentation with questions
S3 Undertake market analysis to establish potential routes to market.	Interview underpinned by portfolio of evidence
S4 Conduct benchmarking to evaluate costs against industry standards.	Presentation with questions
S5	Presentation with questions

KNOWLEDGE	ASSESSMENT METHODS
Prepare or contribute to the drafting of a sourcing plan which meets business needs, including corporate social responsibility factors.	
S6 Use the organisation's documentation designed for commercial procurement processes for the supply of goods and services.	Interview underpinned by portfolio of evidence
S7 Notify potential suppliers of proposal requirements.	Interview underpinned by portfolio of evidence
S8 Use selection and award criteria to source requirements from external suppliers evidencing how supplier bids are evaluated against them.	Interview underpinned by portfolio of evidence
S9 Analyse the financial implications of decisions and identify cost-saving opportunities.	Presentation with questions
S10 Liaise and negotiate with suppliers and stakeholders to ensure the timely delivery of purchased goods and services.	Interview underpinned by portfolio of evidence
S11 Support contract award and briefing of suppliers in line with the organisations processes and governance.	Interview underpinned by portfolio of evidence
S12 Monitor and manage contract performance to meet time, costs, service, and quality objectives.	Presentation with questions
S13 Manage contract performance and advise suppliers on any areas for improvement.	Interview underpinned by portfolio of evidence
S14 Maintain contract documentation such as change control, version control.	Interview underpinned by portfolio of evidence
S15 Use IT and software to produce spreadsheets and presentation packages to communicate information.	Presentation with questions

KNOWLEDGE	ASSESSMENT METHODS
S16 Identify, raise, and facilitate discussions with stakeholders to resolve any issues or risks.	Presentation with questions
S17 Analyses sustainability challenges and risks at each stage of the product or contract life cycle.	Presentation with questions
S18 Manage information in accordance with policy and processes.	Interview underpinned by portfolio of evidence
S19 Continuously review work processes to identify and eliminate inefficiencies and simplify workflow.	Interview underpinned by portfolio of evidence
S20 Use available systems and tools to identify relevant data.	Presentation with questions
S21 Interpret, analyse, and evaluate data through questioning to drive actionable intelligence and support decision making.	Presentation with questions
S22 Use horizon scanning to identify future changes in procurement and contracting.	Interview underpinned by portfolio of evidence
BEHAVIOUR	**ASSESSMENT METHODS**
B1 Role models ethical behaviour and practices.	Presentation with questions
B2 Seeks learning opportunities and continuous professional development.	Interview underpinned by portfolio of evidence
B3 Takes responsibility, shows initiative, and is organised.	Presentation with questions
B4 Considers the “big” picture and the detail together.	Presentation with questions
B5 Works flexibly and adapts to circumstances.	Interview underpinned by portfolio of evidence

BEHAVIOUR	ASSESSMENT METHODS
B6 Works collaboratively with others across the organisation and external stakeholders.	Interview underpinned by portfolio of evidence

Mapping of KSBs to grade themes

Presentation with questions

KSBS GROUPED BY THEME	KNOWLEDGE	SKILLS	BEHAVIOUR
Procurement and supply chain outcomes K18 K19 K26 S2 S12 S21	Category specific knowledge of contracts, market, and legislative requirements to ensure goods or services are procured in a compliant and sustainable way. (K18) Conduct planning and forecasting which support the business decisions and the delivery of procurement. (K19) Project management tools and techniques. (K26)	Interpret business requirements by assessing the demand for the product or service. (S2) Monitor and manage contract performance to meet time, costs, service, and quality objectives. (S12) Interpret, analyse, and evaluate data through questioning to drive actionable intelligence and support decision making. (S21)	None
Stakeholder engagement S1 B1 B3	None	Manage relationships with stakeholders. (S1)	Role models ethical behaviour and practices. (B1) Takes responsibility, shows initiative, and is organised. (B3)
Financial management K5 S4 S9	How commercial models are applied to generate the best value for the organisation, and how they influence customer and supplier behaviour. (K5)	Conduct benchmarking to evaluate costs against industry standards. (S4) Analyse the financial implications of decisions and identify cost-saving opportunities. (S9)	None
Local, global, and sustainable sourcing strategies K3 K4 K11	Collect and utilise market, supplier, and product intelligence to inform business strategies and	Prepare or contribute to the drafting of a sourcing plan which meets business needs, including corporate	Considers the “big” picture and the detail together. (B4)

KSBS GROUPED BY THEME	KNOWLEDGE	SKILLS	BEHAVIOUR
S5 B4	optimise the procurement process. (K3) Market and product intelligence and supplier innovation support the development of business cases. (K4) Ethical and sustainability risks and opportunities related to sourcing decisions. (K11)	social responsibility factors. (S5)	
Innovation tools and techniques K24 S15 S20	The principles of continuous improvement and how to identify and implement opportunities for improvement within the procurement and contract management process. (K24)	Use IT and software to produce spreadsheets and presentation packages to communicate information. (S15) Use available systems and tools to identify relevant data. (S20)	None
Negotiation and risk management S16 S17	None	Identify, raise, and facilitate discussions with stakeholders to resolve any issues or risks. (S16) Analyses sustainability challenges and risks at each stage of the product or contract life cycle. (S17)	None

Interview underpinned by portfolio of evidence

KSBS GROUPED BY THEME	KNOWLEDGE	SKILLS	BEHAVIOUR
Infrastructure and governance K15	The organisation's commercial strategy and policies, procedures, and	Support contract award and briefing of suppliers in line with	None

KSBS GROUPED BY THEME	KNOWLEDGE	SKILLS	BEHAVIOUR
S11	governance processes. (K15)	the organisations processes and governance. (S11)	
Financial management K1 K7	Procurement life cycles and how they fit into the organisation's structure and budgets. (K1) The importance of collaboration between the Procurement, Finance, and other business functions. (K7)	None	None
Procurement and supply chain outcomes K8 S6 S8 S10	Incorporate business objectives and needs into procurement specifications by utilising tools and techniques to create solutions. (K8)	Use the organisation's documentation designed for commercial procurement processes for the supply of goods and services. (S6) Use selection and award criteria to source requirements from external suppliers evidencing how supplier bids are evaluated against them. (S8) Liaise and negotiate with suppliers and stakeholders to ensure the timely delivery of purchased goods and services. (S10)	None
Management of procurement and the supply chain K6 K9 K13 K14 K21 K22 K23	The principles of achieving efficiencies and continuous improvement. (K6)	Undertake market analysis to establish potential routes to market. (S3)	Works flexibly and adapts to circumstances. (B5)

KSBS GROUPED BY THEME	KNOWLEDGE	SKILLS	BEHAVIOUR
S3 S7 S13 S14 S18 S19 B5 B6	The principles and purpose of commercial contracting. (K9) The documentation and terminology that form part of the commercial contract process such as the contract and its appendices. (K13) The procurement negotiation techniques required to reach a mutually beneficial agreement. (K14) The components, benefits, and constraints of taking a category management approach throughout the procurement life cycle. (K21) The digital and software tools used in procurement and supply chain management, such as "source to contract" platforms, supply chain finance tools, complex sourcing, and auctions, spend analytics, AI, risk tools and guided buying. (K22) The organisation's contract award process. (K23)	Notify potential suppliers of proposal requirements. (S7) Manage contract performance and advise suppliers on any areas for improvement. (S13) Maintain contract documentation such as change control, version control. (S14) Manage information in accordance with policy and processes. (S18) Continuously review work processes to identify and eliminate inefficiencies and simplify workflow. (S19)	Works collaboratively with others across the organisation and external stakeholders. (B6)
Sustainability K12 K25 S22	The use of procurement to drive "social value" and sustainability, such as emissions reduction, use of diverse suppliers (SMEs, BAME owned firms), addressing human rights in the supply chain, and	Use horizon scanning to identify future changes in procurement and contracting. (S22)	None

KSBS GROUPED BY THEME	KNOWLEDGE	SKILLS	BEHAVIOUR
	combatting environmental harm. (K12) The use of horizon scanning to identify the current and future needs of the sector and procurement landscape. (K25)		
Development of the team and individual B2	None	None	Seeks learning opportunities and continuous professional development. (B2)

Case study test

KSBS GROUPED BY THEME	KNOWLEDGE	SKILLS	BEHAVIOUR
Case study test K2 K10 K16 K17 K20	Relevant regulations and legislation such as procurement, data protection, environmental, social and governance, and how they impact on the procurement process. (K2) How contract terms, conditions and obligations affect delivery, supplier performance and outcomes for the organisation. (K10) Principles and purpose of the organisations contract governance, risk management, and internal controls. (K16) Supplier performance monitoring, management, and reporting techniques which impact on, service, quality, and sustainability objectives. (K17) Analyse spend data and generate recommendations to feed into business and commercial strategies. (K20)	None	None

Supporting information

External quality assurance

Option selected: Ofqual

Involved employers

Amey, AstraZeneca, Atkins, Babcock, Balfour Beatty, BT, Cabinet Office, CGI, CIPS, Crown Commercial Services, Department for Education, Department of Health & Social Care, Equans, Foodbuy, ISS, Jacobs, KFM, Leeds Teaching Hospitals NHS Trust, Lincolnshire County Council, MAG Airports, Meggitt, Microsoft, Mitie, Ministry of Defence, National Grid, NatWest, Quantum 360, Serco, Sodexo, Sopra Steria, Thales, Thwaites, Tilbury Douglas Limited.

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