

Workplace Pensions Trailblazer Apprenticeship PMI End-point Assessment Programme

End-point Assessment Specification December 2016

The End-point Assessment will be synoptic and therefore cover the knowledge elements of the Standard, however it will focus primarily on the skills and behaviours in the Standard. Some knowledge will be evidenced implicitly through the skills demonstrated by the apprentice e.g. using systems and processes to do the role requires the knowledge.

The End-point Assessment comprises the following elements:

	Description
Portfolio	The Portfolio contains evidence from real work activity by the apprentice that is likely to have completed towards the end of the apprenticeship and will illustrate the application of the knowledge, skills and behaviours within the Standard synoptically. It will demonstrate the application of knowledge and competence in the work environment and is likely to cover the bulk of the standard. It may also draw on the apprentice's learning record created during the apprenticeship.
Reflective Discussion	The Reflective Discussion is a structured interview between the apprentice and the Assessment Organisation, focusing on the softer skills of the Standard (e.g verbal communication, relationship management), exploring what has been produced in the Portfolio, how it has been produced and how well they are performing in their role.

NB Further details on the Apprenticeship Standard and End-point Assessment can be found in the Assessment plan.

The combination of these two elements builds a cumulative picture of performance against the Standards. They require apprentices to demonstrate the application of knowledge, skills and behaviours in an integrated manner to deliver the required outcomes, enabling the Assessment Organisation to make an holistic judgement about how well the apprentice meets or exceeds the Standard. Whilst the bulk of the evidence is expected to come from the Portfolio, it is the combined picture that determines the result.

The purpose of this document is to outline the nature of these elements of the End-point Assessment.

Portfolio

Detailed guidance on the contents of the portfolio, including examples of evidence that could be used and also the differences between pass and distinction grades are included in the Assessment Criteria and Portfolio Content document.

An End-point Assessor will need to be satisfied that the evidence is:

- Sufficient
- Authentic
- Relevant
- Current
- Consistent

An End-point Assessor must ensure any evidence included in the portfolio meets these five criteria.

An End-point Assessor must judge every piece of evidence by asking the following questions:

Is it sufficient?

Does it meet the assessment criteria? Evidence must cover all aspects of the assessment criteria for the standard. Sufficient does not mean a mass of evidence and quality is more important than quantity. It means collecting enough evidence to demonstrate competence.

Is it authentic?

An End-point Assessor needs to be certain that the evidence presented really is the candidates' own work. This is particularly important where candidates work in teams, especially in pensions departments where they routinely check each other's work. An End-point Assessor needs to be certain that the evidence is that produced by the candidate and not something checked and corrected by a colleague.

A candidate must be prepared to be able to explain and substantiate any evidence that is included. There is also a declaration that is completed by candidate and employer to confirm the evidence is authentic.

Is it relevant/valid?

All evidence must relate clearly to the standard. End-point Assessors need only be interested in evidence which clearly links a candidate's performance with specific areas of the standard. Documents, training materials and other evidence that does not demonstrate or evidence competence is not relevant.

Is it current?

'Current' means evidence relating to skills, attitudes and knowledge that are demonstrable at the end of the apprenticeship.

Is the evidence consistent?

It is essential to the concept of competence that candidates should be able to repeat their competent performance at a future date.

To ensure consistency an End-point Assessor may also want to be convinced that the evidence is typical of the candidates' normal performance and is not just something specially prepared for assessment. This is likely to form an important part of the reflective discussion.

Reflective Discussion

The reflective discussion is a vital part of the assessment process. It allows an End-point Assessor:

1. *To confirm competence referenced by other types of evidence.*

Competent candidates must be able to perform similar tasks to the required standard on future occasions and in slightly different circumstances. One way to check this, is to question the candidates about the tasks they have completed to ensure that they have understood what they have done and why. If their answers are satisfactory it is reasonable to infer that they will be able to repeat the competent performance.

2. *To test underpinning knowledge and understanding.*

In some cases it is clear from your candidates' competent performance that they must possess the underpinning knowledge and understanding required. Where you, as the End-point Assessor, are not certain that this is the case, you can use questions to support your assessment decision.

3. *To confirm a candidate is competent overall and has completed the apprenticeship.*

All End-point Assessments are subject to a process of moderation prior to the confirmation of the result.

Structured Brief for the Reflective Discussion

This discussion will take place once the End-point Assessor has reviewed the portfolio of evidence. It can take place:

- a. Face to face, usually at the place of employment; or
- b. Remotely, via telephone, video conference. This option will be selected if required by location or other such reasons.

The exact length of the discussion may be determined by the choice of the above methods or other variables linked to the portfolio. We would expect it to be between 1 – 2 hours.

End-point Assessors have been instructed that questions must

- a) be open ended to allow the candidates to develop the answer;
- b) not lead the candidates to the right answer;
- c) relate only to the assessment criteria being assessed;
- d) encourage candidates to expand on answers which are unclear or incomplete.

A typical format follows:

1. Formalities and Introductions

It is expected that the discussion will be between the End-point Assessor and the Apprentice. It is possible, should the need arise that consultations with other relevant individuals will need to be arranged, either in advance, on the day or subsequently.

This might also include reference to any special arrangements required or made.

2. Apprentice invited to provide an overview of the Apprenticeship process/experience. This might include:
 - a. A summary of the role
 - b. Introduction to the organisation
 - c. Previous experience/background
 - d. Parties involved (line managers/mentors/trainers/colleagues) including the role of any training provider.
3. Apprentice invited to summarise the Apprenticeship process/experience. This might include:
 - a. What has gone well
 - b. The best bits
 - c. The most challenging/toughest parts
 - d. Any specific problems/other relevant factors
4. Apprentice invited to provide an overview of the sources of evidence in the portfolio. This might include:
 - a. Areas where the End-point Assessor feels particular attention needs to be paid
 - b. Areas where evidence may have been difficult to obtain and reasons.
 - c. A preponderance of a particular type of evidence.
 - d. Evidence that appears to be insufficient
 - e. Evidence supporting a distinction determination
 - f. Evidence connected in whole or part with a qualification.
5. Apprentice invited to comment on:
 - a. Working relationships
 - b. Future career plans
 - c. Whether they have enjoyed the experience and why
 - d. Any other areas