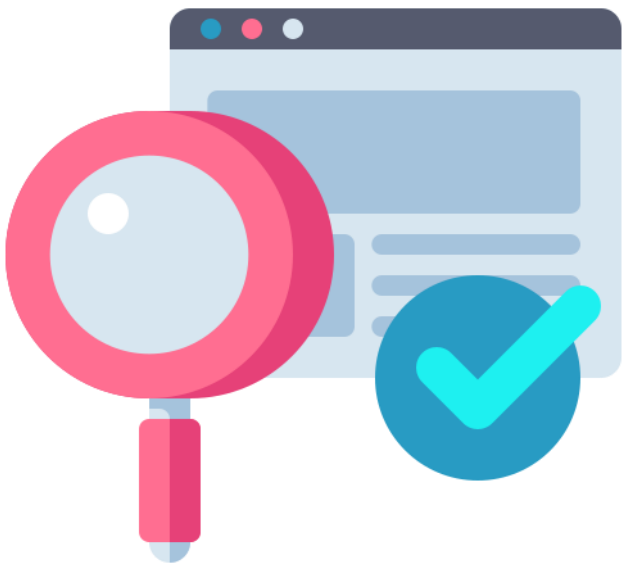# openawards

EPA Handbook
ST0945: Outdoor Learning Specialist

Version history

Version	Date	Change(s) made	Section(s)	Publication source(s)
0.1	30/11/2022	Input draft content	All	Dev team
0.2	16/01/2023	Refine content	All	Dev team
0.3	17/01/2023	Update content	Assessment and Appendices	Dev team
0.4	21/01/2023	Update content based on review and feedback	All	Dev team
1.0	28/01/2023	Update content to align with IEPA handbook	Assessment and Appendices	Dev team
1.0	01/02/2023	Amended after final review	Assessment and Appendices	Dev team

Contents

About Open Awards

Set up in 1981 as Open College Network North West Region (OCNNWR) and now trading as Open Awards, we have been in business for 40 years. During that time, we have helped thousands of learners get started on the education ladder, return to learning, achieve qualifications to help their careers and progress into further and higher education.

We were the first awarding organisation to design qualifications and courses based on credit accumulation so that learners could achieve in "bite sized" chunks. We designed the units and qualifications that became the basis of the Qualification and Credit Framework (QCF).

We are more than just another Awarding Organisation. Uniquely, we have deep roots in the education sector as forward-thinking organisations, FE Colleges and Local Authorities, created Open College Networks (OCNs) to promote education and achievement. We have a governance structure, which is drawn from the people who use our services – our providers and centres – so that we can truly say we are "of the sector and for the sector". Our purpose is to meet the needs of our provider organisations and their learners. We are a not-for-profit organisation and a registered charity and we use our funds to invest in our products and services to support the very organisations that use our products.

Open Awards qualifications are approved by the regulators (Ofqual in England and CCEA in Northern Ireland) and are designed to meet the needs of learners and employers. The range of qualifications we offer is designed to meet the aspirations of learners who are seeking a stepping stone to their career, returning to learning or wishing to progress and build their skills and experience. We are constantly adding to our qualification portfolio to ensure that it is fresh and up to date.

We are delighted to have expanded our scope, becoming an end-point assessment organisation (EPAO) for a growing number of apprenticeship standards in England approved by the Institute for Apprenticeships and Technical Education (IfATE). Our EPAO number is: **EPA0565**

Occupational overview

This occupation is found in outdoor sport, leisure, tourism, public health, youth work and education sectors. Apprentices are employed by charitable outdoor organisations, private and for-profit outdoor learning businesses, schools, expedition providers, social enterprises, etc. Outdoor Learning Specialists work within a variety of contexts, such as: outdoor adventure and activity businesses; expedition and sports tourism providers; early years, schools, colleges and universities; national parks, nature reserves and country parks; youth work and youth development organisations; health, wellbeing and social care contexts; and training and educational organisations.

The broad purpose of the occupation is the design, planning and delivery of programmes that provide progressive learning and change using outdoor activities and experiences. Typical impacts are educational achievement, personal and social development, health and wellbeing, nature connection, outdoor science, team cohesion, or practical skills development.

In smaller organisations Outdoor Learning Specialists are likely to perform all duties of this standard within their role. In larger organisations their role may specialise in duties related to programme delivery, customer relationship management, staffing and team support, or safety and risk management for example.

Outdoor Learning Specialists apply professional judgement in order to facilitate safe and effective individual and group learning. Their technical and subject specific outdoor activity competence will have been developed through a mix of academic and vocational qualifications, and experience. They have a broad and specialised knowledge of the natural outdoor environment and determine likely hazards of undertaking activities and perform in-advance and in the moment (dynamic) risk – benefit assessments. Outdoor Learning Specialists manage the allocated resources required for an outdoor learning programme, including delivery team, vehicles, trailers, technical equipment, catering, budget, etc. They are able to work autonomously to direct and support delivery staff and solve problems associated with a dynamic change in group, equipment, or environmental conditions using an appropriate problem solving, recovery, rescue or emergency response.

The daily activities of Outdoor Learning Specialists include the following:
- interacting with programme participants, customers and stakeholders to identify needs and expectations
- sequencing, planning, monitoring and reporting on the delivery of an outdoor learning programme
- working with department heads of stores, hospitality and catering to prepare logistics
- working with the allocated delivery team to direct their work on a programme

- working with the operational or duty manager to report on safety and customer satisfaction
- communicating as required with landowners, organisations, local communities and other users (human and fauna) where the outdoor learning programme is operating
- working with their line manager.

Outdoor Learning Specialists are able to perform in situations which are often physically and emotionally demanding, remote, unpredictable and complex. When the environment, weather conditions or individual circumstances change they will adapt their approach to ensure the physical, social and emotional wellbeing of participants and to facilitate positive relationships between participants for sometimes long periods of time.

An Outdoor Learning Specialist will be responsible for needs analysis & diagnosis, design, planning, execution and evaluation of outdoor learning development programmes for children, young people and adults. They will be informed by relevant policies, reports, evidence and research and comply with the Institute for Outdoor Learning (IOL) Code of Professional Conduct; first aid, safeguarding and professional liability responsibilities; and legislation including the Health and Safety at Work Act, Equality Act and Adventure Activity Licensing Regulations (or any replacement scheme which may come into force). Outdoor Learning Specialists facilitate the progressive development of activity competence, interpersonal and intrapersonal life skills, outdoor and environmental knowledge and understanding. They will coach, mentor and provide feedback to allocated outdoor activity session delivery staff to develop their knowledge and skills in meeting the outcomes of the programme. They understand the issue of environmental impact in the outdoor environment and encourage a positive and sustainable approach within their organisation and with all participants, following the principle of minimum impact to the natural environment and promoting on-going activity participation and engagement with the outdoors.

Further details on the knowledge, skills and behaviours associated within the occupational standard are in Appendix 1 (pg. 41) and are also accessible on the IfATE website[1].

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[1] **https://www.instituteforapprenticeships.org/apprenticeship-standards/outdoor-learning-specialist/**

Standard information

Level: 3

Reference: ST0945

Approved for delivery: 02 February 2022

Route: Health and Science

Typical duration to gateway: 24 months (this does not include the EPA period)

Employers involved in creating the standard: PGL, Outward Bound, Field Studies Council, Plas Y Brenin, Heatree Activity Centre, Locomotivation, Inspiring Learning and South Devon College.

External Quality Assurance Provider: Ofqual

Entry requirements

The completion of a DBS check in line with local and organisational safer recruitment guidelines.

Progression opportunities

Apprentices who successfully complete their Outdoor Learning Specialist Apprenticeship are likely to attain, or be able to work towards roles such as: outdoor development trainer, outdoor education teacher, outdoor educator, outdoor learning course director, outdoor programme tutor, senior field studies tutor, senior outdoor instructor/coach, senior/lead/area ranger.

Professional recognition

This standard aligns with the following professional recognition:
•   Institute of Outdoor Learning for Associate Professional.

On-programme requirements

A summary of the on-programme requirements for each apprentice is outlined below.

- Training to develop the knowledge, skills and behaviours (KSBs) of the occupational standard.
- Training towards all mandated qualifications for this standard if not already achieved:
    - Ofqual Level 2 Safeguarding qualification appropriate to the employer's business
    - Ofqual Level 3 two-day Outdoor First Aid Award
- Training towards English and mathematics Level 2, if required.
- Compilation of a portfolio of evidence to outline apprentices' work during their apprenticeship programme, mapped to the KSBs from the occupational standard.

Registration, gateway and booking

Registration with Open Awards

Registration is the point at which an employer signals that it has selected Open Awards as their end-point assessment provider. Employers are encouraged to register their apprentices with Open Awards, through the training provider, as soon as possible. Our EPAO number is: **EPA0565**

Registrations can be made by providers via the EPA Section of Open Awards' Secure Portal. Early registrations enable Open Awards to initiate early dialogue to ensure arrangements can be planned, such as IEPA availability, to ensure end-point assessment is delivered as smoothly as possible in a timescale that supports the employer's planned gateway date. It also enables the training provider to access a range of practice and preparation materials, so they and the employer can support the apprentice prepare for end-point assessment.

Please note that Open Awards are only able to accept registrations from training providers who are currently on the Register of Approved Training Providers (RoATP).

In line with the Education & Skills Funding Agency's (ESFA) requirements, the employer must inform Open Awards of the planned gateway and end-point assessment dates at least three (3) months in advance.

Gateway

Gateway is the point at which the employer reviews their apprentice's knowledge, skills and behaviours, and formally confirms the apprentice has reached occupational competency, completed all the mandatory elements of their apprenticeship programme and are ready for end-point assessment. The training provider may support the employer in making this decision, but the decision is made by the employer, with the apprentice also confirming they are ready for end point assessment.

End-point assessment must be completed by an independent End-point Assessment Organisation (EPAO) selected by the employer, such as Open Awards, from the ESFA's Register of End Point Assessment Organisations (RoEPAO).

The end-point assessment period should only start, and the end-point assessment arrangements confirmed, once the employer is satisfied that the apprentice is consistently working at or above the level of the occupational standard, all of the pre-requisite gateway requirements for EPA have been met and that they can be evidenced to Open Awards. For this standard, end-point assessment must be completed within a period lasting a maximum of three (3) months, beginning when the apprentice has met the end-point assessment gateway requirements.

The training provider must provide Open Awards with all required evidence to enable Open Awards to undertake the necessary gateway checks. This evidence includes:

- Fully completed and signed Gateway agreement and authenticity form.
- Apprentices must have achieved English and mathematics at Level 2. The Department for Education maintains a list of current and prior qualifications accepted as meeting the minimum English and maths requirements for apprenticeships at Level 3 and above. The most current list can be found on the ESFA website[2]. For those apprentices with an education, health and care plan or a legacy statement the apprenticeships English and mathematics minimum requirement is Entry Level 3 and British Sign Language qualifications are an alternative to English qualifications for whom this is their primary language. apprentices must have completed the 12-month minimum apprenticeship on-programme duration.
- For this standard, apprentices are also required to have completed a portfolio of evidence.
- For this standard, employers are required to submit a brochure (or similar document) that outlines their specific services. See additional requirement section below for further detail.
- Achievement of the following required qualifications:
    - Level 2 Ofqual registered Award in Safeguarding relevant to the employer's business.
    - Level 3 Ofqual registered 2-day Outdoor First Aid Award.

Open Awards cannot accept end-point assessment booking requests until the gateway checks have been satisfactorily completed, so failure to submit all the necessary information or evidence will delay this process. Open Awards will contact the training provider if the information or evidence is missing or insufficient, so that this can be rectified as quickly as possible. Open Awards aims to complete gateway checks **within five (5) working days** from receipt of the gateway declaration and authenticity form, subject to provision of all necessary information and ancillary evidence.

Once gateway checks have been successfully completed, Open Awards will confirm provisional bookings or schedule subsequent bookings.

Additional requirement

Open Awards must generate a relevant and accessible Customer Needs Brief for each apprentice so that they can complete a customer proposal report (End-point assessment method 1). To achieve this, the employer must provide Open Awards with a brochure, or other document, that outlines their specific services and the contexts and conditions in which they operate. For employers with a narrow range of 'niche' services, Open Awards must be made aware of the specific services offered and those that they are unable to offer. The apprentice doesn't need to deliver a programme for this EPA, but should be

relatively familiar with the range of services, activities and contexts that they will consider when writing their customer proposal report. An example Customer Needs Brief can be seen in Appendix 3 (pg. 51) which covers the following minimum requirements:

- the overall programme aim.
- the required outputs, outcomes and impact for the programme.
- the participant group – size, age range, characteristics, needs, etc.
- duration and number of distinct interventions requested.
- specific locations, outdoor activities and experiences to be included or excluded in the programme.
- resources and constraints such as people, skills, facilities, equipment, time and finance.

Booking

Bookings can be made by providers via the EPA Section of Open Awards' Secure Portal. As per ESFA guidance, Open Awards requires at least three (3) months advance notice of the potential gateway date. However, training providers may make provisional bookings at any point following Open Awards acceptance of an apprentice registration.

Open Awards will endeavour to accept and schedule bookings for end-point assessment to meet the expressed preference dates of the employer wherever possible. However, any provisional booking cannot be confirmed or scheduled by Open Awards until gateway checks have been successfully completed.

Cancelling or rescheduling a booking

Provisional bookings can be re-scheduled or cancelled by providers via the EPA Section of Open Awards' Secure Portal. Confirmed bookings **up to 10 workings days** before the assessment day can be re-scheduled at no charge. Confirmed bookings cancelled or re-scheduled with **less than 10 workings days'** notice will incur a charge in line with Open Awards fees policy[2].

Assessment plan version

Open Awards will undertake end-point assessment in line with the requirement of the current version of the assessment plan or in line with IfATE directions. Training providers and employers must contact Open Awards to discuss any instance where they believe it is appropriate for assessment to be undertaken in line with a historic/ previous version of the assessment plan. Because Open Awards may need to liaise with either IfATE or the External Quality Assurance Provider to determine whether this is allowable, training providers and employers should be aware this may delay the ability of Open Awards to undertake end-point assessment until resolved.

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[2] Available on the Open Awards Secure Portal **https://portal.openawards.org.uk/Login.aspx**

Identification checks

Open Awards requires the apprentice to present photographic identification to an Open Awards invigilator or IEPA immediately prior to each assessment on each assessment day. This is a requirement to ensure Open Awards can confirm an individual completing an assessment is the person they are claiming to be.

The following are acceptable forms of evidence of an apprentice's identification:

- a valid passport (any nationality)
- a signed UK photo card driving licence
- valid warrant card issued by HM Forces or the Police
- other photographic ID card, e.g., employee ID card (must be current
- employer), student ID card, travel card
- UK biometric residence permit.

Where this identification is not available to be checked, the assessment will not be allowed to commence.

Where an apprentice does not have access to the necessary identification or where the name on the identification does not match the name registered with Open Awards, the training provider must contact Open Awards to make arrangements for alternative or additional authentication checks to be made.

Data management

Open Awards has a responsibility under the Data Protection Act to ensure that learners and apprentices are informed of how their information is processed and shared.

Open Awards collects and processes personal learner information for the purpose of: registering learners and apprentices, and awarding learner and apprentice achievements; exercising its functions; and meeting its responsibilities, both statutory and otherwise.

Further information on the personal data and information shared with Open Awards and how we use it and who we share it with can be found in the Privacy Notice: Learner Information which is on the Open Awards website.

Whilst we endeavour to collect only that data for which there is a legal or sound business requirement and to ensure the integrity of the data, we strongly encourage customers to contact us if you believe any data to be incorrect.

Any concerns can be sent to Open Awards by emailing **enquiries@openawards.org.uk**

In compliance with ESFA Conditions for being on the register of end-point assessment organisations, Open Awards must retain information about the EPAs undertaken and payment received for six (6) years after the activity took place. This will include details of what assessments were undertaken, against which versions of the standard and assessment plan, when and by whom, along with assessment outcomes and evidence of the internal quality assurance of those assessments. Open Awards is also required to share end-point assessment information with the External Quality Assurance Provider to ensure they are able to undertake their regulatory role. The External Quality Assurance Provider for this standard is Ofqual.

For the purposes of the Data Protection Act and General Data Protection Regulation (GDPR) 2018, Open Awards is the data controller for personal information processed by the organisation.

Assessment

The EPA consists of three assessment methods which are individually graded.

- Assessment method 1: Customer proposal report, presentation and questioning.
  - Component 1: A customer proposal report.
  - Component 2: A presentation with questioning.
- Assessment method 2: Observation with questions.
- Assessment method 3: Professional discussion underpinned by a logbook of evidence.

Assessment preparation
Assessment specifications (Appendix 2, pgs. 45-50) and assessment records (Appendices 8-10, pgs. 60-88) are available to support training providers and employers post-gateway to ensure apprentices are well prepared for their EPA experience.

Order of assessment methods
The assessment methods can be delivered in any order. The result of one assessment method does not need to be known before starting the next.

Assessment window
EPA assessment components must be undertaken within a period of three months from the gateway.

Assessment method 1: Customer proposal report, presentation and questioning

Overview

The Independent end-point assessor (IEPA) plays the role of the customer and will provide a Customer Needs Brief (see example in Appendix 3, pg. 51) that is appropriate for each individual apprentice to address within their employer setting and which outlines the key customer's requirements for an outdoor learning programme, including:

- the overall programme aim
- the required outputs, outcomes and impact for the programme
- the participant group – size, age range, characteristics and needs
- the duration and number of distinct interventions (activities/experiences) requested
- the specific locations, outdoor activities and experiences to be included or excluded in the programme
  any resources and constraints regarding people, skills, facilities, equipment, time or finance.

Apprentices are required to write a customer proposal report to meet the Customer Needs Brief, addressing the customer needs within their business context. The customer proposal report will be a proposal to deliver a programme of progressive outdoor learning activities and experiences to enable participants to achieve outcomes agreed with the customer.

Apprentices will prepare and deliver a presentation that demonstrates how their proposed outdoor learning programme will meet the customer's needs. This will be followed by questioning from an IEPA to elicit evidence of the required knowledge, skills and behaviours (KSBs) for this assessment method as outlined in the standard and assessment plan.

Preparing for the customer proposal report

The IEPA will generate an appropriate and relevant Customer Needs Brief to be provided to the apprentice within **5 days** of EPA booking post-Gateway. The IEPA will ensure they select a Customer Needs Brief that can be addressed by a realistic business application for their setting. The IEPA will choose or generate a customer needs brief on this basis from a bank developed and maintained by Open Awards. The programme theme and activities must be suitable for the employer context and reasonable for the employer to provide resources for it if they were to provide the programme in practice.

Assessment 1, Component 1: Customer proposal report

After receiving the Customer Needs Brief from Open Awards, the apprentice will produce a customer proposal report that addresses the outlined customer's needs within the context of their setting and be realistic to deliver. The customer proposal report will be 2,000 words (+/- 10% at the apprentice's discretion) including tables, graphs, figures, though excluding references and annexes.

The customer proposal report must include:

- an introduction
- a programme plan including:
    - o sequence of outdoor activities and experiences
    - o client, organisation, participant and delivery team responsibilities
    - o required resources
- an explanation of how the required outputs, outcomes and impact will be achieved
- relevant research and evidence that underpins the chosen programme and approach
- details of all applicable legislation, codes of practice and workplace policies and procedures
- a proposed method for monitoring and assessing participants progress towards achieving the outcomes
- suggestions for alternative approaches that might be considered within organisational capabilities
- an annex showing how the report maps to all required KSBs.

Assessment conditions

The apprentice will have **6 weeks** from receipt of the Customer Needs Brief to complete their customer proposal report. The employer should ensure the apprentice has sufficient time and the necessary resources, within this period, to plan and undertake the work associated with the customer proposal report and the employer/training provider must ensure that all work is solely the work of the apprentice and must sign document **ST0945-CPAS** (Appendix 5, pg. 55) to confirm this.

The customer proposal report, plus materials relating to the presentation (see pg. 18), must be submitted together after the gateway.

The IEPA will review and assess the customer proposal report holistically together with the presentation and questioning. The IEPA will make all grading decisions.

Assessment 1, Component 2: Presentation and questioning

The apprentice will present the main points of their proposed outdoor learning programme, focusing on how they have planned to meet the Customer Needs Brief. It should cover the following:

- theory of change of the proposed programme
- risk-benefit assessments and decision-making approach
- plans for responding to dynamic changes that may occur during delivery
- leadership approaches
- methods for facilitating outdoor learning.

The IEPA will then draw out any further information using questions to enable the apprentice to demonstrate the relevant KSBs assigned to this assessment method as outlined in the standard and assessment plan. The IEPA will select a minimum of 5 questions covering each topic (bulleted in the list above) from a bank of questions and question prompts provided by Open Awards. Open Awards will provide training and guidance for their IEPAs on how to select the most relevant questions and how flexible they can be in amending the questions or asking follow up questions in order to best draw out the apprentice's knowledge, skills and behaviour.

Questions are intended to confirm the IEPA's understanding of the presentation and how it demonstrates the relevant KSBs. They may ask follow-up questions where clarification is required. The IEPA must use the full time available for questioning to allow the apprentice the opportunity to evidence their depth and breadth of understanding and occupational competence at the highest level available, unless the apprentice has already demonstrated the highest level of understanding and occupational competence as outlined grading criteria.

Assessment conditions

The IEPA will be given **2 weeks** to review the customer proposal report submitted by the apprentice prior to the presentation. When submitting the customer proposal report to Open Awards the apprentice needs to include details of any technical requirements for the presentation component.

The presentation with questions must be carried out over a maximum total assessment time of **one hour (60 minutes)**, typically **30 minutes** for the presentation and **30 minutes** for the question and answer session. However, the IEPA has the discretion to increase the overall time by up to 10% (i.e., **6 minutes**), but only to allow the apprentice to complete a part of their presentation or to complete answers they have started in the question and answer session.

The IEPA will **not** inform the apprentice whether they have additional time or how much additional time may be available. The apprentice should **not** assume that they will receive any additional time.

A short break of up to 10 minutes may be taken between the presentation and question and answer session to enable the independent assessor to review the questions they have identified in advance, in light of the presentation delivered. Where breaks occur, they will not count towards the total assessment time.

Open Awards expects the presentation with questions will be conducted in the apprentice's normal working environment to take account of the occupational context in which the apprentice operates. The apprentice should be free to use whatever reasonable medium they wish, such as a poster, flipchart, whiteboard, slides, or handouts, etc. The employer is responsible for providing the resources and availability for the presentation. The employer/provider must also schedule and secure a slot for this assessment component with Open Awards so that Open Awards can arrange for a suitable IEPA to conduct the assessment.

The IEPA will conduct the presentation and question session in person where possible, but this may also be conducted by video conferencing facility (e.g., MS Teams or Zoom) if an in-person session is difficult to arrange.

Only the IEPA will observe the presentation. An Open Awards representative may be present when necessary for moderation purposes.

Assessment method 2: Observation with questions

Overview

The IEPA will observe the apprentice working in their usual working environment, carrying out a range of normal work activities. At the end of one or more activities, the IEPA will ask the apprentice questions to enable assessment of the breadth and depth of underpinning knowledge against the grading descriptors and KSBs outlined in the apprenticeship standard and assessment plan.

The apprentice must be observed undertaking the following activities during the observation.

Activity 1: Briefing an allocated programme delivery team to ensure the needs of the customer and outcomes of the programme are understood and actively worked towards.

Activity 2: Leading individual and/or group learning outdoors using safe activity instruction and professional judgement to enable all participants to contribute and respond to changing conditions and needs.

Activity 3: Facilitating and engaging participants in the learning process to provide an equal and inclusive learning experience that supports participants to achieve the intended outcomes of the programme.

IEPAs will **not** be monitoring National Governing Body (NGB) and organisational policies or procedures, e.g., adherence to location specific ratios. However, IEPAs need to be aware of such policies and should arrange with the employer and/or training provider about how to access these policies which they may need to refer to when assessing apprentices' observed performance and answers to questions.

The IEPA will observe the apprentice carrying out these activities and record evidence that meets the KSB grading criteria shown in the Observation with Questions Assessment Record (Appendix 9, pgs. 70-77) relevant to this End-point assessment method. Evidence of the following elements are included:
- relevance, sufficiency and completeness of the apprentice's work
- quality of the observed apprentice's performance during activities
- quality of the apprentice's answers to IEPA questions following activities.

Observations will be undertaken on a one-to-one basis and the IEPA is only able to assess one apprentice at a time. The IEPA must be non-obtrusive, i.e., they must observe only and **not** contribute in any way to the session.

After activities have been completed, the IEPA will ask the apprentice questions about the activities to draw out evidence of the apprentice's relevant knowledge, skills and behaviours. The aim of the questions is to give apprentices the opportunity to

demonstrate their knowledge, skills and behaviours that were either not demonstrated in the performance of the activities themselves, or which were not demonstrated with sufficient depth to meet the given grading criteria. The questions are chosen from a question bank developed and maintained by Open Awards.

Preparing for the observation

The employer must plan the order of the three relevant activities to enable the IEPA to observe each activity in the minimum possible time frame, e.g., Activity 1 might be a briefing to a programme delivery team in the morning, where Activities 2 and 3 may take place during the planned outdoor learning session later that morning or the early afternoon. The employer must discuss scheduling an IEPA for the observation along with the other assessment components with Open Awards delivery team to ensure time windows and resources can be reasonably allocated to meet the needs of all parties.

Assessment conditions

Activities may be carried out at different times to reflect the real working environment with the total time allocation of **150 minutes** for observation of the three activities and the subsequent question and answer session(s). The observed activities can be split over **120 minutes** and the question and answer session can be completed over **30 minutes**, or more than one session can be split across this time. A discretionary additional 10% time can be allocated in any proportion across the observation and questioning. The IEPA can be flexible with how the overall time is split across observed activities and question and answer session(s). See three examples of how the timings may be split below. These are only examples; there is flexibility to split the time between activities in a way that is appropriate to the specific programme being delivered, e.g., a team briefing for activities with complex health and safety logistics, or complex individual learning, behavioural and health issues may require more than 15 minutes.

Example 1
Activity 1 (Team briefing): 15 minutes
Activities 2 and 3 (Planned outdoor learning session): 110 minutes
Questions on all activities: 30 minutes
Total time: 155 minutes (150 minutes + 5 discretionary minutes added)

Example 2
Activity 1 (Team briefing): 10 minutes
Activity 1 questions: 5 minutes
Activities 2 and 3 (Planned outdoor learning session): 105 minutes
Activities 2 and 3 questions: 30 minutes
Total time: 150 minutes

Example 3
Activity 1 (Team briefing): 15 minutes
Activity 1 questions: 5 minutes
Activities 2 (Outdoor learning session A): 75 minutes
Activities 2 questions: 20 minutes
Activity 3 (Outdoor learning session B): 35 minutes
Activity 3 questions: 10 minutes
Total time: 160 minutes (150 minutes + 10 discretionary minutes added)

The IEPA will select questions from a question bank provided by Open Awards. Open Awards will provide training and guidance for IEPAs on how to select the most relevant questions and how flexible they can be in amending the questions or asking follow up questions in order to best draw out the apprentice's knowledge, skills and behaviour. The questions will provide apprentices with the opportunity to demonstrate areas of the KSB grading criteria for this assessment method that were either not observable, or were not demonstrated to sufficient depth to meet the grading criteria. IEPAs must ensure that apprentices have the opportunity to demonstrate their knowledge, skills and behaviours at the highest available grading point for each KSB criteria.

The observation with questions must be carried out over a maximum total assessment time of **two and a half hours (150 minutes)**, typically **two hours** for the observed session and **30 minutes** for the question and answer session. However, the IEPA has the discretion to increase the overall time by up to 10% (i.e., **15 minutes**), but only to allow the apprentice to complete activities, or to complete answers they have started in a question and answer session. The IEPA will **not** inform the apprentice whether they have additional time or how much additional time may be available. The apprentice should **not** assume that they will receive any additional time.

The observation with questions may be conducted over a number of discrete sessions completed over **1 day**. Where breaks occur, they will not count towards the total assessment time. In certain circumstances, assessment may be held over a maximum of 2 working days at the discretion of Open Awards delivery team. This would only be permissible should circumstances prevent the demonstration of assessable KSBs over one day, e.g., where planned programme activities necessarily start very early in the day.

Open Awards expects the observation will be conducted in the apprentice's normal working environment to take account of the occupational context in which the apprentice operates. The employer is responsible to provide the resources and availability for the outdoor learning activities and must also schedule and secure an observation slot with Open Awards so that the Open Awards can organise an IEPA to conduct the observation. In making a booking, the employer should ensure the apprentice has sufficient time to be observed for all three activities.

All participants must have given prior agreement to be observed, and the employer/training provider must be able to provide written evidence of this agreement, e.g., a signed and dated statement of agreement/consent form.

The IEPA will always attend the observation and question session in person, unless this is not possible due to restrictions imposed by the venue (e.g., with a secure estate or specific health settings). In these exceptional circumstances, agreement for a video recording of the session to be submitted may be approved by Open Awards, subject to confidentiality and GDPR legal requirements. Where these exceptional circumstances exist, Open Awards expects to be informed prior to the gateway to be able to make an informed decision as to whether the proposed observation activity is appropriate. Where a video submission is approved arrangements will be made for it to be viewed by the IEPA alongside the apprentice, to replicate the observation process. Questions can then be defined for clarification in the same way as they would be after a normal, in person observation.

Assessment method 3: Professional discussion underpinned by a logbook of evidence

Logbook of evidence

Apprentices on this standard are required to develop and submit a logbook of evidence. The logbook must be submitted to Open Awards alongside other gateway evidence. Open Awards preferred format is an electronic logbook either uploaded by the training provider to their Open Awards SharePoint folder, or else a login provided to enable Open Awards to access the logbook. Training providers should contact Open Awards to discuss alternative arrangements, e.g., where a paper-based or mixed logbook is developed.

Apprentices should select their best possible evidence to reflect their current level of proficiency against the standard at the point they undertake their professional discussion. The logbook is not assessed and will only be used to support the professional discussion. However, where the content requirements (pg. 25) are not met, or the evidence not authenticated, the logbook will be returned by Open Awards to the apprentice, via the training provider, for amendment and subsequent resubmission. This resubmission will not be considered as an assessment attempt. Resubmission of the logbook will not constitute either a resit or retake of the professional discussion. However, this will delay completion of the gateway checks therefore, training providers and employers are encouraged to ensure the logbook requirements are met before submission at gateway.

Open Awards have developed supporting evidence tracking documentation to support apprentices, training providers and employers to meet the logbook content requirements set out in the assessment plan. This documentation is available from the Open Awards Secure Portal:

ST0945-LAS	Logbook authenticity statement – Completion of this is a mandatory requirement.
ST0945-ECRS	Evidence and KSB Criteria Reference Sheet (Logbook) – Completion of this is a mandatory requirement as it shows the evidence requirements within the assessment plan have been met; however, Open Awards will accept any alternative equivalent approach demonstrating that the logbook content and structure requirements set out below (pg. 25) have been met. The form may also help the Independent end-point assessor IEPA) to prepare for the professional discussion by giving apprentices the opportunity to signpost to where they believe appropriate evidence may be found.

Logbook content and structure

The logbook of evidence must:

- be compiled during the on-programme period of the apprenticeship
- contain evidence related to the KSBs assessed by Assessment method 3: Professional discussion underpinned by a logbook of evidence
- typically contain 10 or more discrete pieces of evidence
- cover the 13 occupational duties outlined in the standard.

Evidence may be used to demonstrate more than one KSB. The document **ST0945-ECRS** (seen in Appendix 7, pg. 57) can be downloaded from the Open Awards Secure Portal; this should be used to map on-programme evidence against the relevant KSB criteria demonstrated as set out in the standard. All KSB criteria should be demonstrated in the logbook.

The logbook will not be assessed by Open Awards, nor will Open Awards provide feedback on evidenced work, but will be used by the IEPA to prepare for the apprentice's professional discussion.

The logbook can be made up of a collection of evidence in a variety of formats, including written, audio and video. Sources may include:

- workplace documentation/records for outdoor learning programmes that the apprentice has directly worked on, for example
  - Logbook of programmes managed by the apprentice
  - Risk-benefit assessments
  - Relevant workplace policies/procedures
  - The Theory of Change for outdoor learning programmes delivered
  - Handouts of presentations delivered to customers / stakeholders
  - Learning resources incorporating the use of digital technology
  - Programme evaluation/research reports
  - Programme outcome / impact reports
  - Programme reports prepared for funders or stakeholders
  - Programme review and recommendation reports
- witness statements
- annotated photographs
- GDPR and safeguarding compliant video clips (maximum total duration 10 minutes); the apprentice must be in view and identifiable
- annotated photographs of the apprentice carrying out relevant outdoor learning activities with redacted faces and names of participants (the apprentice must be in view and identifiable if appropriate)
- reports, minutes, action logs
- observations by the apprentice's manager or mentor
- review meeting notes
- feedback (managers and peers)
- performance reviews.

Authenticity of apprenticeship work

The evidence provided must be valid and attributable to the apprentice. The logbook of evidence must contain a statement from the employer and apprentice confirming this (form **ST0945-LAS** in Appendix 6, pg. 56).

What to avoid

Logbook evidence should **not** include reflective accounts or any methods of self-assessment **unless** this is part of the KSB being assessed, i.e., a KSB criterion directly indicates reflective practice knowledge and/or skills. Any employer contributions should focus on direct observation of performance (for example witness statements) rather than opinions.

Logbook submission

The logbook must be submitted at gateway alongside the gateway evidence. Because the logbook must be completed as a gateway requirement, all evidence must be generated and dated pre-gateway. No post-gateway dated evidence can be included.

Where post-gateway evidence is included within the logbook, the content requirements are not met or the evidence is not authenticated, the logbook will be returned by Open Awards to the apprentice via the training provider for amendment and subsequent resubmission. Resubmitted logbooks must be submitted to Open Awards to enable the gateway checks to be completed.

Professional discussion

The apprentice and the IEPA will have a two-way dialogue, allowing the apprentice to evidence the KSBs assigned to this End-point assessment method in each key area of activity outlined in the apprenticeship standard and assessment plan. The IEPA will ask a minimum of 6 open questions.

The IEPA will draw on appropriate evidence from the apprentice's logbook to underpin the discussion. The logbook itself will not be assessed, but it must meet a minimum level of quality to enable the professional discussion to take place.

Preparing for the professional discussion

The IEPA will conduct a thorough review of the apprentice's submitted logbook of evidence in order to plan and structure the professional discussion. To do this, IEPAs will draw on the training and guidance provided by Open Awards. IEPAs will also use a question bank prepared and maintained by Open Awards. The apprentice must be given at least **5 working days'** notice of the date and time of the professional discussion.

Assessment conditions

The discussion will be undertaken on a one-to-one basis between the IEPA and the apprentice and last for **40 minutes**. However, the IEPA can increase the overall time by up to 10% (i.e., **4 minutes**), but only to allow the apprentice to complete the answer they are giving. The IEPA will **not** inform the apprentice whether they have additional time or how much additional time may be available. The apprentice should **not** assume that they will receive any additional time.

The professional discussion may be undertaken by the same IEPA that undertook one or both of the other End-point assessment methods. This is not a requirement because all End-point assessment methods are independent of each other.

In the case where the same IEPA undertakes all End-point assessment methods, the presentation of customer proposal (EPA method 1), the observation with questions (EPA method 2) and the professional discussion (EPA method 3) may be conducted at the employer's premises on the same day to encourage efficient use of both employer and Open Awards resources.

In circumstances where it is difficult to undertake a professional discussion at the employer's or provider's premises, it can be undertaken remotely through video conferencing (e.g., MS Teams or Zoom). Further details of this option are available from Open Awards.

As the professional discussion only involves the apprentice and the IEPA, neither the employer nor provider are required to attend.

Grading

Mapping of KSBs against assessment methods

Appendix 1 (pgs. 41-44) shows each assessment method and the KSBs from the apprenticeship standard that are assessed by that method. Additionally, Appendix 2 (pgs. 45-50) and Appendices 8-10 (pgs. 60-77) detail the breakdown of the KSBs assessed in each of the key areas within each EPA method and their associated grading criteria.

Grading individual assessments

Apprentices must meet all the pass criteria to gain a pass for each End-point assessment method.

Apprentices must meet all the distinction criteria to gain a distinction for each End-point assessment method.

Aggregation of individual assessment grades into an overall grade

Performance in the EPA will determine the apprenticeship grade of fail, pass, or distinction.

Apprentices who fail one or more assessment method will be awarded an overall EPA 'fail'.

In order to gain an overall EPA 'pass', apprentices must achieve a pass in all the assessment methods.

To achieve an overall EPA 'distinction', apprentices must achieve distinction in all the assessment methods. Grades from individual assessment methods should be combined in the following way to determine the grade of the EPA as a whole.

Assessment method 1 – Customer Proposal Report & Presentation	Assessment method 2 – Observation with questions	Assessment method 3 – Professional discussion	Overall grading
Fail	Any grade	Any grade	Fail
Any grade	Fail	Any grade	Fail
Any grade	Any grade	Fail	Fail
Pass	Pass	Pass	Pass
Distinction	Pass	Pass	Pass
Pass	Distinction	Pass	Pass
Pass	Pass	Distinction	Pass
Pass	Distinction	Distinction	Pass
Distinction	Distinction	Pass	Pass
Distinction	Pass	Distinction	Pass
Distinction	Distinction	Distinction	Distinction

Reasonable adjustments and Special considerations

Open Awards is committed to ensuring access to fair assessment for all learners and to protecting the integrity of assessments and qualifications.

There may be circumstances whereby arrangements need to be made to take account of particular learners' requirements in order to ensure that this is achieved without giving any unfair advantage over other learners.

The Reasonable Adjustments and Special Considerations Policy and Procedures, sets out the principles which should be followed when making decisions about adjustments to assessment. It outlines Open Awards' reasonable steps to ensure it avoids disadvantage (directly or indirectly) in line with the requirements of The Equality Act 2010 (Disability) Regulations 2010. The policy and procedures are accessible through the Open Awards Secure Portal.

Reasonable adjustments

Any action that helps to reduce the effect of a disability or difficulty that places a learner at a substantial disadvantage in the assessment situation. Reasonable adjustments are adjustments made to an assessment for a qualification so as to enable a disabled learner to demonstrate his or her knowledge, skills and understanding to the levels of attainment required by the specification for that qualification.

Reasonable adjustments must not affect the reliability or validity of the assessment outcomes but may involve:
- changing the usual assessment arrangements, e.g., allowing a learner extra time to complete an assessment activity
- adapting assessment materials e.g., by providing large print or providing materials in Braille
- providing assistance during an assessment e.g., by providing a trained signer, interpreter or a reader
- changing the assessment method e.g., from a written assessment to a spoken assessment
- using assisted technology such as screen reading or a voice activated software.

Reasonable adjustments must be approved and set in place before the assessment takes place. The work produced by the learner will be assessed in the same way as all other learners.

Where the employer and training provider believe reasonable adjustment(s) may be required, this can be identified at the registration stage. Open Awards requires a minimum of 90 days' notice of any request for reasonable adjustments so this can be considered and where approved, arrangements made.

Special considerations

Adjustments which may be applied after an assessment where the learner has encountered exceptional circumstances that have disadvantaged them during their assessment.

The assessment plan for the apprenticeship standard defines permissible special considerations and the circumstances surrounding the apprentice's End-point assessment that fall within this definition.

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Cancellations or rescheduled assessments

Cancellation by the apprentice, training provider or employer

Provisional bookings can be re-scheduled or cancelled at no charge. Confirmed bookings can be re-scheduled at no charge **up to 10 workings days** before the assessment day.

Confirmed bookings cancelled or re-scheduled with **less than 10 workings days'** notice will incur relevant costs associated to the booking.

The 5% apprentice registration fee is non-refundable regardless of withdrawal date.

Cancellation by Open Awards

In the unlikely event that a confirmed booking has to be cancelled by Open Awards, it will be rescheduled as soon as possible for a mutually convenient time. There will be no additional charges associated with the rescheduled assessment.

Confirmation of results

Assessment results will be made available to providers via the EPA Section of Open Awards' Secure Portal. Results of assessment will normally be provided to the training provider **within 10 working days** of the assessment being undertaken. The exception to this is the online knowledge test where the result notification will normally be provided **within 72 hours** of the assessment taking place.

Resits and Retakes

Open Awards provides resit and retake opportunities in line with ESFA requirements unless the assessment plan associated with the apprenticeship contains alternative requirements.

Apprentices who fail one or more assessment method will be offered the opportunity to take a resit or a retake. Open Awards will provide feedback alongside the result notification to all apprentices who fail an assessment method. This feedback will be provided via the training provider, normally **within 10 workings days** of the assessment taking place. The exception to this is the online knowledge test where only the result notification will be provided and this will normally be **within 72 hours** of the assessment taking place.

Where the result notification suggests a retake may be appropriate, the ESFA recommend the employer and training provider consider a supportive action plan that responds to the performance weaknesses identified within the feedback. This action plan should clearly state the nature and extent of the re-training and include the estimated time to prepare the apprentice for the retake. When a retake is booked, Open Awards will require confirmation from the training provider that the apprentice has received further training and is ready to be assessed.

A resit involves the apprentice attempting one or more failed assessment components again, without the need to undertake further training.

Open Awards normally require a **minimum of 10 workings days'** notice when booking a resit or a retake. The exception is the online knowledge test when **five (5) workings days'** notice is required.

The number of resits and retakes that can be taken by an apprentice will normally be at the discretion of the employer. The ESFA recommends a limit of two (2) resits or retakes, however, more than two (2) resits or retakes may be taken if available, or unless otherwise specified or limited within the assessment plan.

Resits or retakes are only to be taken in the event of a failure. A resit or retake cannot be taken with the intention of increasing the original grade if an apprentice has passed their

EPA. Therefore, feedback will not normally be provided to apprentices who achieve a pass or higher.

The maximum grade that can be achieved for a resit or retake is a pass, unless Open Awards has determined there are exceptional circumstances. Where an apprentice believes exceptional circumstances impacted on their initial assessment attempt, they must submit a formal request with supporting evidence for exceptional circumstances to be considered, directly to Open Awards **within five (5) working days** of receiving the assessment decision.

The same IEPA who undertook the initial assessment attempt may be allocated by Open Awards to assess an apprentice's resit or retake. This may be a requirement of the assessment plan. The allocation of IEPAs to assessments will be taken by Open Awards based upon the requirements of the assessment plan or operational considerations.

Appeals and Complaints

Open Awards is committed to ensuring that all assessment decisions are consistent, fair and based on valid judgements made by independent IEPAs.

If an apprentice is satisfied with their result but seeks information as to why a specific grade was awarded, they can request formal feedback through their training provider. This feedback will be limited to justification of the decision and will not be developmental in nature (i.e., indicate how they may have achieved a higher grade). This feedback may take **up to 20 working days** to be provided. Further details are available from Open Awards.

If an apprentice is not satisfied with their result, they can request an enquiry about results which is an informal appeal. Open Awards will review the documentation for administrative errors and correct these if identified. An enquiry about results must be made by the apprentice **within 10 working days** of notification of the results concerned.

Alternatively, or subsequent to an enquiry about results, if an apprentice is not satisfied with their result, they may lodge an appeal. Appeals can be made by the training provider on behalf of the apprentice, but they must have the permission of the apprentice to do this.

Appeals made in respect of the final overall grade will result in a delay to the completion certificate being requested by Open Awards. For further details regarding the process, timelines and fees, please refer to Open Awards' Enquiries and Appeals Policy and Procedures which can be found on the Portal.

Completion and certification

Open Awards will issue a summary of results following successful completion of all EPA assessments. This will be issued to the apprentice via the provider and show the grade associated with each assessment, alongside the overall grade and the date this was awarded.

Open Awards will also request the apprenticeship completion certificate from the IfATE on behalf on an apprentice once they have completed their apprenticeship. As part of the gateway declaration form an apprentice is required to give Open Awards permission to do this on their behalf. Without this permission Open Awards is unable to claim the certificate.

Open Awards will request the certificate once the apprentice has received and agreed the final grade. Where the apprentice does not formally agree the final grade, Open Awards will assume it is agreed once the window for an enquiry about results or appeal is extinguished (**10 working days** from the notification of results). Requests for the certificate are then made **within 20 working days** and in most instances, sooner. IfATE normally send the completion certificate directly to the employer by recorded delivery; this can take **up to 15 working days** to arrive from the date it is requested.

Quality assurance

Internal quality assurance

Quality assurance is at the heart of Open Awards' practices and we follow suitably rigorous processes to ensure that the integrity of our assessments is maintained.

Internal quality assurance is the process of reviewing and evaluating assessment practices and decisions to ensure that:

- an identified individual is responsible for coordinating internal quality assurance processes
- there are clear and documented roles and responsibilities for all those involved
- all learners are assessed accurately, fairly and consistently to the right standard
- internal quality assurance is structured and incorporates all of the requirements set out in the assessment plan associated with the apprenticeship standard
- assessment tasks and learner work are sampled appropriately
- good practice is promoted through internal standardisation events and quality assurance meetings
- decisions are supported by full and clear records and action plans that are followed
- internal processes are transparent and regularly evaluated.

External quality assurance

External quality assurance for this apprenticeship standard is undertaken by Ofqual.

Maladministration and Malpractice

Maladministration is defined as any activity, neglect, default or other practice that results in an apprentice, training provider or employer not complying with the specified requirements for delivery of end-point assessment.

Malpractice is any act, default or practice which:

- compromises, attempts to compromise, or may compromise, the process of assessment/ examinations, the integrity of any end-point assessment activity or the validity of an assessment result or certificate, including maladministration
- damages the authority, reputation or credibility of Open Awards or any officer or employee
- involves a failure by an apprentice, training provider or employer to provide Open Awards with such necessary information as required to enable it to investigate allegations of suspected malpractice also constitutes malpractice.

An apprentice, training provider or employer must report any allegation of suspected malpractice/ maladministration to Open Awards. Failure to report allegations of malpractice/ maladministration can lead to assessment results not being conferred and certification claims not being processed, and future registrations not being accepted.

Further information is available within Open Awards' Malpractice and Maladministration Policy and Procedures, including how Open Awards will manage alleged or suspected malpractice or maladministration.

Where Open Awards is satisfied on the balance of probabilities that an allegation is substantiated, it reserves the right to impose a range of sanctions on an apprentice and/ or training provider and/ or an employer, depending on the seriousness of the situation and the risk to the interests of learners and the integrity of the end-point assessment and the effect on public confidence in Open Awards. Further information can be found within Open Awards' Sanctions Policy.

Open Awards will ensure that in most cases alleged malpractice is kept confidential between itself and those directly impacted. However, in cases of serious malpractice, Open Awards may exchange information with the regulators, other end-point assessment organisations and other appropriate authorities.

Open Awards Policies and Procedures

Current versions of the following Open Awards policies and procedures, relevant to end point assessment are accessible to training providers through the Secure Portal. Employers and apprentices can obtain copies from the relevant training provider, or can be obtained directly by contacting Open Awards.

- End Point Assessment Pricing Policy
- Reasonable Adjustments and Special Considerations Policy
- Data protection
- Enquiries and Appeals Policy and Procedures
- Complaints Policy
- Malpractice and Maladministration Policy and Procedures
- Equality and Diversity Policy
- Sanctions Policy
- Safeguarding Policy
- Conflict of Interest Policy
- Fair Access policy

In addition, the current version of the following relevant document may be obtained by training providers, employers or apprentices by contacting Open Awards directly:

- Instructions for Conducting Controlled Assessment Remotely

Open Awards recommends that local copies of policies and procedures are not made and referred to as these may not be current.

Fees and Charges

Open Awards standard fees and charges for end-point assessment, including resists and retakes are set out the schedule of fees. The current schedule can be found on the Open Awards' website.

Support

The Open Awards website **www.openawards.org.uk** is the best source for general information with full listings of our qualifications, news, events, assessment information, policies, and details of our support services.

In addition, our experienced customer service team can be contacted on 0151 494 2072 or via email **enquiries@openawards.org.uk.**

Glossary

Assessment	The process of making judgements about the level of occupational proficiency an apprentice can demonstrate when measured against the knowledge, skills and behaviours set out in the standard.
Assessment Criteria	Assessment criteria describe what a learner should be able to do in order to demonstrate competence (i.e., pass).
Authentic	Evidence must be the apprentice's own work.
Completion certificate	The certificate issued by IfATE which demonstrates an apprentice has successfully completed their apprenticeship.
Diversity	Acknowledging that each individual is unique and recognising individual differences, e.g., culture, ability, gender, race, religion, wealth, sexual orientation, or any other individual characteristic.
EQA	External Quality Assurance.
Equality	Fair treatment for all regardless of differences, e.g., culture, wealth, race, gender, ability, sexual orientation or any other group characteristic.
Evidence	How an apprentice demonstrates knowledge, skills or behaviour that can be used to make a judgment of achievement against criteria.
Fair	Ensuring that everyone has an equal chance of getting an objective and accurate assessment.
Gateway	The point at which the employer decides the apprentice is occupationally competent and ready to undertake end-point assessment.
Holistic	Holistic assessment is identifying how evidence can relate to and be cross referenced to other units rather than taking a unit by unit approach.
Independent assessment	Assessment decisions made by an IEPA and end-point assessment organisation who have no relationship with the apprentice, training provide or employer and therefore, have no interest in the assessment result.
Independent end-point assessor (IEPA)	The individual recruited and trained by the Awarding Organisation who assesses the apprentice during end-point assessment.
IQA	Internal Quality Assurance.
Learning Outcomes	Learning outcomes describe what an apprentice should know and understand by the end of a unit.

Reliable	Reliable evidence indicates that the apprentice can consistently perform at this level. A reliable method of assessment will produce consistent results for different IEPAs at each assessment.
Simulation	Where simulation is allowed it must replicate working activities in a realistic workplace environment. A realistic working environment is one which replicates what is likely to happen when an individual is carrying out their normal duties and activities at their employer's premises.
Sufficient	Enough evidence as specified in Evidence Requirements or Assessment Strategy.
Valid	Evidence must be relevant to the learning outcome and assessment criteria i.e., capable of measuring the knowledge or skills in question. For example, a written test cannot measure a candidate IEPA's ability to provide feedback to learners.
XAMS	The Open Awards platform used for online assessments and tests.

Appendix 1 Map of KSBs against assessment methods

End-point assessment method 1: **Customer proposal report, presentation and questioning**

KSBs	Apprenticeship standard descriptor (knowledge)
K2	How to use Theory of Change to design outdoor learning programmes or services that contribute to desired long-term impact, including organising and aligning intended outcomes with meaningful/realistic learning opportunities utilising outdoor activities and experiences.
K3	Legislation, codes of practice, ethics and accepted good practice related to the safe delivery of learning experiences in the outdoor and indoor environments in which they work.
K4	Recognised approaches to outdoor learning appropriate to their workplace including their history, pedagogy/andragogy and application when designing, planning and delivering outdoor learning programmes.
K5	The background and application of relevant theories of human and social development; models of psychology; and neuroscience appropriate to their work
K6	The physical and emotional capacity, motivation drivers, developmental needs and rights of the population group they work with.
K7	The evidence base for the effectiveness of the outdoor learning provided in their workplace and the relevant evaluation and research data.
K8	The ethics, theories, legal position and methods of making and recording risk–benefit assessments for outdoor learning experiences.
K9	Workplace policies and procedures relevant to leading an outdoor learning programme including the planning process, safety systems, budgetary control, and reporting.
K11	Theories and models for leading groups in the outdoors.
K12	Relevant research and theory on decision making and judgement in the outdoor setting informed by approaches to reflection in-action, reflection on-action-in-context, and reflection on-action.
K13	How to recognise and respond to a dynamic change in environmental, individual, or group conditions using an appropriate problem-solving, recovery, rescue or emergency response.

K14	The benefits of instruction, teaching, coaching and mentoring approaches and their application in facilitating outdoor learning.
K16	Principles of assessment as learning, rules of assessment evidence and assessment methods suitable for the range of activities and intended outcomes of the outdoor programmes delivered.
K25	How to lead meetings, structure and deliver effective instructions, presentations, written reports.
KSBs	**Apprenticeship standard descriptor (skills)**
S2	Plan a purposeful sequence of outdoor learning activities and experiences matched to an agreed Theory of Change.
S3	Comply with relevant legislation and codes of practice related to the safe delivery of learning experiences in the outdoor and indoor environments in which they work.
S4	Make programme design and delivery decisions based on the pedagogy/andragogy of the chosen approaches to outdoor learning used by their organisation.
S5	Produce risk-benefit assessments for outdoor learning programmes.
S20	Engage and communicate confidently, clearly and considerately with individuals, small groups and larger groups.
S21	Lead meetings, deliver presentations and write short reports.

End-point Assessment Method 2: Observation with questions

KSBs	**Apprenticeship standard descriptor (knowledge)**
K10	Approaches for motivating, supervising, coaching and mentoring staff allocated for a programme.
K15	Methods to differentiate learning to respond to different learning preferences, group dynamics and interpersonal communication, emotional and cultural intelligences.
K17	Feedback methods that support participants to achieve intended outcomes and development goals
K18	Methods to identify and overcome barriers to equality, diversity and inclusion within programmes, the organisation and the wider sector.
KSBs	**Apprenticeship standard descriptor (skills)**
S6	Supervise, motivate and work alongside the delivery team allocated to an outdoor learning programme, taking into account available resources, participant needs, individual and organisational approach, programme budget, intended outcomes and desired long-term impact.
S7	Lead differentiated outdoor learning activities and experiences to meet the needs and capabilities of individual participants within the group using appropriate resources and techniques.

S8	Instruct others in how to participate in activities correctly and safely and vary the content, tempo and direction of the activities to enable all participants to contribute to and benefit from the experience.
S9	Make decisions informed by data such as by observations, experience, reflection in action (in the moment), reflection on-action-in-context (during the experience), reflection on action (post experience) and professional judgement.
S10	Deal with a dynamic change in group, equipment, or environmental conditions using an appropriate problem solving, recovery, rescue or emergency response.
S11	Create the conditions for participant engagement and achievement whilst supporting equality and diversity and inclusion.
S12	Use a relevant approach such as instruction, teaching, coaching and mentoring approaches to assist participants to meet the intended outcomes of a session and programme.
S13	Use relevant approaches to outdoor learning; theories of human and social development; psychological models; and neuroscience to support participants to achieve the intended outcomes of a programme.
S14	Use the rules of assessment evidence to determine participant progress towards intended outcomes and provide appropriate feedback in terms of its timing, frequency, content and delivery that promotes further learning.
S16	Plan and lead programmes and activities that are sustainable, minimise impact and connect participants with their environment.
S17	Care for, conserve and enhance the environment in which they work.
KSBs	**Apprenticeship standard descriptor (behaviours)**
B1	Acts in a way that builds and maintains positive relationships with colleagues, customers and stakeholders.
B2	Champions the wellbeing and health and safety of participants and stakeholders.
B3	Encourages participants to achieve their potential in the activity, experience or programme.
B4	Acts in a professional and ethical manner and portrays a positive approach to work.
B5	Champions, actively respects and protects the outdoor environment in which they work.

End-point Assessment Method 3: Professional discussion underpinned by a logbook of evidence

KSBs	**Apprenticeship standard descriptor (knowledge)**
K1	Methods to identify and analyse the wants, needs and expectations of participants, customers, and stakeholders.
K19	Digital technologies to support instruction, teaching, coaching and learning in the outdoors and how they benefit self and participants.
K20	The geography and ecology of landscapes in which they practice, including but not limited to local, regional and global perspectives on habitat,

	biodiversity, the effects of climate change, social history, and local effects such as weather and tides.
K21	Methods to gather and analyse feedback and evidence data on outputs, outcomes and impacts of an outdoor learning programme.
K22	Methods to build and maintain effective relationships with a wide range of participants, volunteers, stakeholders and colleagues.
K23	How to positively promote the work of the organisation.
K24	Principles of good customer service, including the types, needs and expectations of internal and external customers and ways to manage conflict.
K26	Ethics and the value of reflective practice for professional development.
K27	Contemporary issues and the global challenges faced by Outdoor Learning, including the role and vision of organisations such as the Institute for Outdoor Learning.
KSBs	**Apprenticeship standard descriptor (skills)**
S1	Use questions, observations, discussions, surveys and active listening to identify the programme needs and expectations of customers, participants and stakeholders.
S15	Use digital technologies to support the delivery of outdoor learning sessions and enable participants to engage with technology to achieve the intended outcomes of a programme.
S18	Use research data and evaluation of own experience to: plan and lead evidence informed outdoor learning experiences; and communicate the value of an outdoor learning programme.
S19	Use data gathered on outputs, outcomes and impacts of outdoor learning programmes to quality assure programme and organisational improvements in the short, medium and longer term.
S22	Use reflective practice in their work.
S23	Recognise own values, beliefs, strengths, areas of development and set future goals in line with own and the organisations objectives.

Appendix 2 Assessment Specifications

| EPA method 1: Customer proposal report and presentation | Customer proposal report: 6 weeks with identity authentication |
| | Presentation: 60 minutes (+6 mins at IEPAs discretion) |

Customer Proposal Report

Key Area	KSB coverage	Grading criteria
Programme planning	K2 How to use Theory of Change to design outdoor learning programmes or services that contribute to desired long-term impact, including organising and aligning intended outcomes with meaningful/realistic learning opportunities utilising outdoor activities and experiences.	**Pass**: Explains a theory of change and programme plan describing the sequence of outdoor activities and experiences intended to achieve the required outcomes and impact.
	K3 Legislation, codes of practice, ethics and accepted good practice related to the safe delivery of learning experiences in the outdoor and indoor environments in which they work.	**Pass**: Plans and designs a programme to meet the customer requirements and ensure that they comply with legislation and policies, address the needs of participants, apply relevant theories, evaluation and research data, and the approach to outdoor learning used in their workplace.
	K4 Recognised approaches to outdoor learning appropriate to their workplace including their history, pedagogy/andragogy and application when designing, planning and delivering outdoor learning programmes.	
	K5 The background and application of relevant theories of human and social development; models of psychology; and neuroscience appropriate to their work.	**Distinction**: Critiques the suitability and completeness of the theory of change and programme plan for the intended participants.
	K6 The physical and emotional capacity, motivation drivers, developmental needs and rights of the population group they work with.	**Distinction**: Critiques how relevant theories, evidence and approaches taken within their workplace are effective in meeting the needs of participants, customers and stakeholders.
	K7 The evidence base for the effectiveness of the outdoor learning provided in their workplace and the relevant evaluation and research data.	
	S2 Plan a purposeful sequence of outdoor learning activities and experiences matched to an agreed Theory of Change.	
	S3 Comply with relevant legislation and codes of practice related to the safe delivery of learning experiences in the outdoor and indoor environments in which they work.	
	S4 Make programme design and delivery decisions based on the pedagogy/andragogy of the chosen approaches to outdoor learning used by their organisation.	
Organisation and risk management	K8 The ethics, theories, legal position and methods of making and recording risk–benefit assessments for outdoor learning experiences.	**Pass**: Summarises how their programme plan complies with workplace policies and procedures and justifies the approach taken to creating risk benefit assessments that demonstrate how any significant risks to the health and safety of those involved can be managed.
	K9: Workplace policies and procedures relevant to leading an outdoor learning programme including the planning process, safety systems, budgetary control, and reporting.	
	S5 Produce risk-benefit assessments for outdoor learning programmes.	**Distinction**: Evaluates the impact of workplace policies and procedures on the creation of risk-benefit assessments that reduce risks whilst also enabling the intended benefits to be achieved.

EPA method 1: Customer proposal report and presentation	Customer proposal report: 6 weeks with identity authentication Presentation: 60 minutes (+6 mins at IEPAs discretion)

Customer Proposal Report		
Decision making Planning for learning	K11 Theories and models for leading groups in the outdoors.	**Pass**: Explains their planned approach to leading the participant group in the outdoors and how they will use reflective processes when making decisions and responding to: situational demands; dynamic changes in environmental conditions or the group; and emergency situations.
	K12 Relevant research and theory on decision making and judgement in the outdoor setting informed by approaches to reflection in-action, reflection on-action-in-context, and reflection on-action.	
	K13 How to recognise and respond to a dynamic change in environmental, individual, or group conditions using an appropriate problem-solving, recovery, rescue or emergency response.	**Pass:** Summarises the chosen instruction, teaching, coaching and mentoring approaches and the assessment evidence and methods that will be used to facilitate participants progress towards achieving the outcomes.
	K14 The benefits of instruction, teaching, coaching and mentoring approaches and their application in facilitating outdoor learning.	
	K16 Principles of assessment as learning, rules of assessment evidence and assessment methods suitable for the range of activities and intended outcomes of the outdoor programmes delivered.	**Distinction**: Justifies their approach to decision making and judgement in the outdoors and the benefits and limitations of their proposed instruction, teaching, coaching and mentoring approaches.

Presentation with questions: present to IEPA, face to face or remotely		
Key Area	**KSB coverage**	**Grading criteria**
Communication	K25 How to lead meetings, structure and deliver effective instructions, presentations, written reports.	**Pass**: Leads meetings, delivers presentations and communicates clearly, confidently and concisely in written and verbal forms appropriate to the audience.
	S20 Engage and communicate confidently, clearly and considerately with individuals, small groups and larger groups.	
	S21 Lead meetings, deliver presentations and write short reports.	

EPA method 2: Observation with questions	150 minutes (+15 mins at IEPAs discretion)

Activity 1: Briefing an allocated programme delivery team to ensure the needs of the customer and outcomes of the programme are understood and actively worked towards		
KSB group	**KSB criteria**	**Grading criteria**
Managing programmes	K10 Approaches for motivating, supervising, coaching and mentoring staff allocated for a programme.	**Pass:** Demonstrates motivating and directing allocated staff to deliver a programme that meets the customer and participants needs, required outcomes, and workplace policies and procedures.
	S6 Supervise, motivate and work alongside the delivery team allocated to an outdoor learning programme, taking into account available resources, participant needs, individual and organisational approach, programme budget, intended outcomes and desired long-term impact.	

Activity 2: Leading individual and/or group learning outdoors using safe activity instruction and professional judgement to enable all participants to contribute and respond to changing conditions and needs		
KSB group	**KSB criteria**	**Grading criteria**
Outdoor leadership	K15 Methods to differentiate learning to respond to different learning preferences, group dynamics and interpersonal communication, emotional and cultural intelligences.	**Pass**: Leads activities and experiences outdoors that champion participant safety and wellbeing and use varied content, tempo, direction and differentiated learning to enable all participants to contribute to and benefit from the activity and experience. **Distinction**: Shows a personalised approach to leadership and instruction to meet the physical, mental and emotional safety and wellbeing needs of individual participants and the group.
	S7 Lead differentiated outdoor learning activities and experiences to meet the needs and capabilities of individual participants within the group using appropriate resources and techniques.	
	S8 Instruct others in how to participate in activities correctly and safely and vary the content, tempo and direction of the activities to enable all participants to contribute to and benefit from the experience.	
	B2 Champions the wellbeing and health and safety of participants and stakeholders.	
	S9 Make decisions informed by data such as by observations, experience, reflection in action (in the moment), reflection on-action-in-context (during the experience), reflection on action (post experience) and professional judgement.	**Pass**: Assesses situations as they occur and responds with professional judgement and decision making informed by data to deal with dynamic changes and solve problems associated with shifting conditions and needs whilst maintaining a positive professional and ethical approach with colleagues, participants and stakeholders. **Distinction**: Evaluates their chosen approach to decision making and judgement in the session and alternatives that could have been taken to respond to a dynamic change in group, equipment or environmental conditions.
	S10 Deal with a dynamic change in group, equipment, or environmental conditions using an appropriate problem solving, recovery, rescue or emergency response.	
	B1 Acts in a way that builds and maintains positive relationships with colleagues, customers and stakeholders.	
	B4 Acts in a professional and ethical manner and portrays a positive approach to work.	

Environment	S16 Plan and lead programmes and activities that are sustainable, minimise impact and connect participants with their environment.	**Pass**: Champions environmental sustainability through practical care and conservation approaches in their instruction and leadership of the activity and experience. Assists participants to connect with and protect the environment.
	S17 Care for, conserve and enhance the environment in which they work.	
	B5 Champions, actively respects and protects the outdoor environment in which they work.	

<table>
<tr><td colspan="3" style="background:yellow">Activity 3: Facilitating and engaging participants in the learning process to provide an equal and inclusive learning experience that supports participants to achieve the intended outcomes of the programme.</td></tr>
<tr><td style="background:orange">KSB group</td><td style="background:orange">KSB criteria</td><td style="background:orange">Grading criteria</td></tr>
<tr>
<td>Facilitating learning</td>
<td>
K17 Feedback methods that support participants to achieve intended outcomes and development goals

K18 Methods to identify and overcome barriers to equality, diversity and inclusion within programmes, the organisation and the wider sector.

S11 Create the conditions for participant engagement and achievement whilst supporting equality and diversity and inclusion.

S12 Use a relevant approach such as instruction, teaching, coaching and mentoring approaches to assist participants to meet the intended outcomes of a session and programme.

S13 Use relevant approaches to outdoor learning; theories of human and social development; psychological models; and neuroscience to support participants to achieve the intended outcomes of a programme.

S14 Use the rules of assessment evidence to determine participant progress towards intended outcomes and provide appropriate feedback in terms of its timing, frequency, content and delivery that promotes further learning.

B3 Encourages participants to achieve their potential in the activity, experience or programme
</td>
<td>
Pass: Creates an equal and inclusive learning experience that supports participant engagement and achievement.
Pass: Uses relevant facilitation approaches and theories of learning and development that supports the intended outcomes of a programme and encourages participants to achieve their potential.
Pass: Delivers timely, evidence-based outcome focused feedback that is meaningful to the participants and assists them in progressing towards intended outcomes.
Distinction: Evaluates the relevance of their chosen approaches to facilitating learning and how their approach impacts on participant engagement, achievement and inclusion.
Distinction: Justifies the steps that could be taken to achieve greater equality, diversity and inclusion within the organisation and the wider sector and the positive impact that may have.
</td>
</tr>
</table>

EPA method 3: Professional discussion underpinned by a logbook of evidence		Minimum of 1 question per key area 40 minutes (+4 mins at IEPAs discretion)
Key Area	**KSB coverage**	**Grading criteria**
a. Customer needs: Identifying programme needs and expectations	K1 Methods to identify and analyse the wants, needs and expectations of participants, customers, and stakeholders.	**Pass**: Describes a range of methods to identify and analyse the programme needs and expectations of customers, participants and stakeholders.
	S1 Use questions, observations, discussions, surveys and active listening to identify the programme needs and expectations of customers, participants and stakeholders.	
b. Effective relationships: Strategies for building relationships and ensuring good customer service	K22 Methods to build and maintain effective relationships with a wide range of participants, volunteers, stakeholders and colleagues.	**Pass**: Explains strategies they use for building and maintaining effective relationships, resolving conflicts, ensuring good customer service and promoting the work of the organisation. **Distinction**: Analyses barriers to effective relationships and how they are overcome.
	K23 How to positively promote the work of the organisation.	
	K24 Principles of good customer service, including the types, needs and expectations of internal and external customers and ways to manage conflict.	
c. Technology: Digital technologies that can be used to support the delivery of outdoor learning.	K19 Digital technologies to support instruction, teaching, coaching and learning in the outdoors and how they benefit self and participants.	**Pass**: Analyses a range of digital technologies that can be used to support the delivery of outdoor learning sessions to achieve the intended outcomes of a programme. **Distinction**: Evaluates the impact and interactions of a range of digital technologies and how they have used a combination of these to produce an intended outcome for a programme.
	S15 Use digital technologies to support the delivery of outdoor learning sessions and enable participants to engage with technology to achieve the intended outcomes of a programme.	
d. Environment: The outdoor environment they work in	K20 The geography and ecology of landscapes in which they practice, including but not limited to local, regional and global perspectives on habitat, biodiversity, the effects of climate change, social history, and local effects such as weather and tides.	**Pass**: Explains the attributes and qualities of the outdoor environment they work in and the effects of changes due to climate, social history and local weather.
e. Evaluation: evaluating outdoor learning programmes	K21 Methods to gather and analyse feedback and evidence data on outputs, outcomes and impacts of an outdoor learning programme.	**Pass**: Summarises the methods they have used to gather and report on the qualitative and quantitative data outputs, outcomes and impacts of an outdoor learning programme. Explains how to apply that data in programme planning and leadership, quality assurance, and organisational improvement. **Distinction**: Critically evaluates medium and long term options for organisational changes and improvements using data from personal experience, research and evaluation to justify suggestions.
	S18 Use research data and evaluation of own experience to: plan and lead evidence informed outdoor learning experiences; and communicate the value of an outdoor learning programme.	
	S19 Use data gathered on outputs, outcomes and impacts of outdoor learning programmes to quality assure programme and organisational improvements in the short, medium and longer term.	

EPA method 3: Professional discussion underpinned by a logbook of evidence		Minimum of 1 question per key area 40 minutes (+4 mins at IEPAs discretion)
Key Area	**KSB coverage**	**Grading criteria**
f. Professional practice: The apprentices' future contribution to challenges faced by Outdoor Learning	K26 Ethics and the value of reflective practice for professional development.	**Pass**: Explains their approach to ethics and reflective practice and what influences their development as a professional. **Pass**: Explains how their personal values and beliefs compliment or conflict with the issues and challenges faced by the outdoor learning sector and their own future goals. **Distinction**: Articulates an ethical dilemma with a participant or stakeholder and evaluates the pros and cons of different courses of action.
	K27 Contemporary issues and the global challenges faced by Outdoor Learning, including the role and vision of organisations such as the Institute for Outdoor Learning.	
	S22 Use reflective practice in their work.	
	S23 Recognise own values, beliefs, strengths, areas of development and set future goals in line with own and the organisations objectives.	

Appendix 3 Example Customer Needs Brief

Example Customer Needs Brief

Customer Needs Brief

We are a primary school group.

We would like an outdoor programme with an overall programme aim to develop teamworking skills.

Our required learning and programme outcomes are:

1. increased resilience

2. increased independence

3. increased appreciation of and connection with nature

4. fun and enjoyment.

We have 36 participants with an age range of 10-11 years (year 6).

The specific needs within this group are:

- one individual with a diagnosis of ADHD

- one individual with diabetes requiring injections.

The programme should be carried out over one full week (Monday to Friday) and will be conducted as a mix of on and off-site.

The activities must be the same for all participant groups and exclude activities at height.

Please ensure you take into consideration the following:

- a parent helper is part of the visiting staff team.

- the group would like to eat their packed lunch on arrival.

- the customer would like to deliver evening sessions to the group themselves.

Appendix 4 Customer Proposal Report and Presentation – Apprentice Instructions

Customer Proposal Report and Presentation – Apprentice Instructions

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Apprentice Instructions for Customer Proposal Report

1. Read the Customer Needs Brief emailed to you from an independent assessor who is playing the role of your customer.

2. Familiarise yourself with this customer's requirements for an outdoor learning programme.

3. You may send one email within **five working** days of receipt to clarity any aspects of the Customer Needs Brief. The 'customer' will reply giving clarity within 5 working days of receiving your query.

4. Produce a customer proposal report that addresses each requirement outlined in the Customer Needs Brief.

Your report should include the following aspects:
- an introduction
- a programme plan (including sequence of outdoor activities, responsibilities and resources)
- how the required outputs, outcomes and impact will be achieved
- relevant research and evidence that underpins your chosen programme and approach
- details of all applicable legislation, codes of practice and workplace policies and procedures
- how participants' progress towards achieving the outcomes will be monitored and assessed
- suggestions for any alternative approaches that might be reasonably considered for this customer.

You have 2,000 words (+/- 10%) for your report which includes any graphs, tables or figures. References and appendices are **not** included in this word count.

Please see next page for apprentice instructions on the presentation component

Presentation

You must prepare a presentation that focuses on the programme you have planned to meet the customer brief and described in your customer proposal report. This presentation should cover the following topics numbered in the table below.

Topic	Key area assessed (See grading table below)
1. Theory of change for the proposed programme	Programme planning
2. Risk-benefit assessments and decision-making approach	Organisation and risk management
3. Plans for responding to dynamic changes that may occur during delivery	Decision making
4. Leadership approaches	
5. Methods for facilitating outdoor learning	Planning for learning

Please see the specific grading criteria against which you will be assessed in the grading table below.

Key area	Pass criteria	Distinction criteria
Customer Proposal Report - Grading		
Programme planning	Explains a theory of change and programme plan describing the sequence of outdoor activities and experiences intended to achieve the required outcomes and impact. (K2, S2)	Critiques the suitability and completeness of the theory of change and programme plan for the intended participants. (K2, S2)
	Plans and designs a programme to meet the customer requirements and ensure that they comply with legislation and policies, address the needs of participants, apply relevant theories, evaluation and research data, and the approach to outdoor learning used in their workplace. (K3, S3, K4, S4, K5, K6, K7)	Critiques how relevant theories, evidence and approaches taken within their workplace are effective in meeting the needs of participants, customers and stakeholders. (K5, K6, K7)
Organisation and risk management	Summarises how their programme plan complies with workplace policies and procedures and justifies the approach taken to creating risk benefit assessments that demonstrate how any significant risks to the health and safety of those involved can be managed. (K8, K9, S5)	Evaluates the impact of workplace policies and procedures on the creation of risk-benefit assessments that reduce risks whilst also enabling the intended benefits to be achieved. (K8, K9)

Key area	Pass criteria	Distinction criteria
Customer Proposal Report - Grading		
Decision making	Explains their planned approach to leading the participant group in the outdoors and how they will use reflective processes when making decisions and responding to: situational demands; dynamic changes in environmental conditions or the group; and emergency situations. (K11, K12, K13)	Justifies their approach to decision making and judgement in the outdoors and the benefits and limitations of their proposed instruction, teaching, coaching and mentoring approaches. (K12, K14)
Planning for learning	Summarises the chosen instruction, teaching, coaching and mentoring approaches and the assessment evidence and methods that will be used to facilitate participants progress towards achieving the outcomes. (K14, K16)	Not applicable
Communication	Leads meetings, delivers presentations and communicates clearly, confidently and concisely in written and verbal forms appropriate to the audience. (K25, S20, S21)	Not applicable

You will present your customer proposal report to an independent assessor, either face-to-face or via online video conferencing. The assessor will ask you a minimum of **5** questions to help you to demonstrate the required knowledge, skills and behaviours (KSBs) for this End-point assessment method as outlined in the apprenticeship standard and assessment plan.

The presentation with questioning will last for **60 minutes**, typically **30 minutes** for the presentation and up to **30 minutes** for the assessor to ask you questions.

You may use any presentation tools, techniques and software that will facilitate you in delivery of this presentation. Make sure your employer or provider agrees to arrange and set up any equipment you may reasonably need to deliver the presentation.

Appendix 5 Customer Proposal Authentication Statement

| **Customer Proposal Authentication Statement** | openawards Qualified |

Authenticity & currency - The work you submit **must** have been produced by you and must be current.

Apprentice name:	Click or tap here to enter text.
Job title/ role:	Click or tap here to enter text.
ULN number:	Click or tap here to enter text.
Employer:	Click or tap here to enter text.
Standard name:	**Outdoor Learning Specialist**
Standard code:	**ST0945**

	Please tick (✓)
I **confirm** that the evidence I have submitted within the customer proposal report is my own work.	☐
I **understand** that my results may be invalidated if I have submitted work that does not belong to me and which has not been clearly acknowledged.	☐
I **confirm** that the work submitted within the customer proposal report was created by me post-gateway during the end-point assessment period.	☐
I **confirm** that the work submitted within the customer proposal report meets the requirements of the apprenticeship assessment plan.	☐

Apprentice signature:	Click or tap here to enter text.
Date:	Click or tap to enter a date.

The work you submit must be current **and** produced by you.

All information provided on this form will be held securely and only used for the purposes provided. Full details on how we use and protect your data are available in our Privacy Notice.

Open Awards tries to meet the highest standards when collecting and using personal information. Customers are encouraged to email info@openawards.org.uk if you believe any data to be incorrect, unfair, misleading or inappropriate.

Appendix 6 Logbook Authentication Statement

Logbook Authentication Statement

Authenticity & currency - The evidence you submit **must**:

- belong to you.
- have been produced by you.
- be current.

Apprentice name:	Click or tap here to enter text.
Job title/ role:	Click or tap here to enter text.
ULN number:	Click or tap here to enter text.
Employer:	Click or tap here to enter text.
Standard name:	**Outdoor Learning Specialist**
Standard code:	**ST0945**

	Please tick (✓)
I **confirm** that the evidence I have submitted within the logbook is my own work.	☐
I **understand** that my results may be invalidated if I have submitted evidence that does not belong to me and which has not been clearly acknowledged.	☐
I **confirm** that the evidence I have submitted within the logbook was created by me pre-gateway during my apprenticeship.	☐
I **confirm** that the evidence I have submitted within the logbook meets the requirements of the apprenticeship assessment plan.	☐

Apprentice signature:	Click or tap here to enter text.
Date:	Click or tap to enter a date.

This statement **must** be submitted by the apprentice along with their logbook

All information provided on this form will be held securely and only used for the purposes provided. Full details on how we use and protect your data are available in our **Privacy Notice.**

Open Awards tries to meet the highest standards when collecting and using personal information. Customers are encouraged to email info@openawards.org.uk if you believe any data to be incorrect, unfair, misleading or inappropriate.

Appendix 7 Evidence and KSB Criteria Reference Sheet (Logbook)

Evidence and KSB Criteria Reference Sheet (Logbook)

Apprentice name:	Click or tap here to enter text.
Job title/ role:	Click or tap here to enter text.
ULN number:	Click or tap here to enter text.
Employer/ Provider name:	Click or tap here to enter text.
Apprenticeship standard:	**ST0945 Outdoor Learning Specialist**

Occupational Duty	Evidence reference	Evidence format	Evidence location	KSB criteria demonstrated
1 Establish participants' needs, customer expectations and agree required outcomes for a programme of outdoor activities that delivers progressive learning and change by working in partnership with individual group members and stakeholders.				
2 Design and plan outdoor learning programmes informed by relevant reports, evidence and research, related theories (e.g., theory of change, physiology, risk-benefit, adventure, sustainability, psychology, outdoor coaching, leadership), legislation (e.g., H&SAW, AALR), ethics (e.g., IOL Code of Professional Conduct), and accepted good practice in outdoor learning (e.g., IOL Occupational Standards, IOL Statements of				

Occupational Duty	Evidence reference	Evidence format	Evidence location	KSB criteria demonstrated
Good Practice, Activity Awarding Body Scope of Practice).				
3 Apply outdoor leadership experience to determine the likely hazards of activities and experiences and perform risk – benefit assessments for working in unknown or complex or unpredictable or wild or remote outdoor environments.				
4 Manage the allocated resources required for an outdoor learning programme, including delivery team, vehicles, trailers, technical equipment, catering, budget, etc.				
5 Coach, mentor and provide feedback to allocated programme delivery team to develop their knowledge skills, competence and confidence in meeting the outcomes of the programme.				
6 Lead individual and group activities and experiences outdoors by applying dynamic risk assessment, and professional judgement and decision making to meet the physical, mental and emotional safety and wellbeing needs of participants.				
7 Assess and solve complex and unpredictable problems associated with changing conditions and needs (for example, individuals, the group, the natural outdoor environment, weather, equipment, etc.) in order to work autonomously in unknown outdoor environments away from immediate help and direct line management.				
8 Manage individual and group wellbeing (e.g., food, shelter, warmth, security, safeguarding, duty of care responsibilities) during day and				

Occupational Duty	Evidence reference	Evidence format	Evidence location	KSB criteria demonstrated
overnight experiences (e.g., wild camp, bunkhouse, residential centre, sail training vessel) and demonstrate equality, diversity and inclusion.				
9 Facilitate learning using a wide variety of teaching, personal development, assessment, reflection, feedback and coaching strategies to engage participants.				
10 Plan, adapt and develop outdoor activity specific learning approaches, teaching resources and equipment to meet a complex variety of environmental, technical and participant needs.				
11 Inspire connection, promote sustainable use and on-going engagement with the natural outdoor environment by explaining the essential facts, principles, values, beliefs, ethics and aesthetics about the outdoor environment they are working in.				
12 Evaluate actions, methods, results and impact of an outdoor learning programme and explain qualitative and quantitative data to customers, stakeholders and other interested parties.				
13 Maintain outdoor learning professional competence and ethical practice by taking responsibility for own learning and development with minimum direction.				

Appendix 8 Customer Proposal Report and Presentation Assessment Record

Customer Proposal Report and Presentation with Questions Assessment Record

Apprentice name:	Click or tap here to enter text.
ULN number:	Click or tap here to enter text.
Employer name:	Click or tap here to enter text.
Apprenticeship standard:	**ST0945 Outdoor Learning Specialist**
IEPA name:	Click or tap here to enter text.
Location:	Click or tap here to enter text.
Date Customer Proposal Report marked:	Click or tap to enter a date.
Customer Proposal Report word count (1800-2200 words)	Click or tap here to enter text.
Date of assessment (presentation):	Click or tap to enter a date.
Photographic proof of identity provided:	Choose an item. **Reasonable adjustments approved:** Choose an item.
Notes on reasonable adjustments (if applicable):	Click or tap here to enter text.
Total assessment time:	Click or tap here to enter text.

Introductory notes for presentation

- The presentation must be carried out under controlled conditions in a suitable environment.

- The IEPA must introduce themselves and confirm their identity to the apprentice and employer/ representative (and others present if appropriate).

- The IEPA must agree with the employer/ representative how disruptions will be managed (e.g., alarms and emergencies) including confirming evacuation procedures.

- The apprentice must provide photographic proof of their identity before the assessment commences. Where this is not provided, the assessment must **not** proceed.

- If at this stage the IEPA believes there is a conflict of interest, the assessment should **not** proceed and they should contact Open Awards for guidance.

- If reasonable adjustments have been requested and approved by Open Awards, the IEPA should record this and confirm that the apprentice is aware of those adjustments before starting.

- If the presentation is undertaken remotely, please record the system used (e.g., Zoom, MS Teams) and the location of both the IEPA and the apprentice.

- The IEPA should confirm the apprentice is ready to be assessed, and understands the assessment parameters.

- The apprentice will have **1 hour** to undertake the presentation with questions, typically **30 minutes** for the presentation and **30 minutes** for the question and answer session.

- The duration of the presentation with questions can be increased by a maximum of 10% or **6 minutes** to allow the apprentice to complete a part of their presentation or to complete answers they have started in the question-and-answer session.

Key area	Pass criteria	Distinction criteria	Outcome
Customer Proposal Report - Grading			
Programme planning	Explains a theory of change and programme plan describing the sequence of outdoor activities and experiences intended to achieve the required outcomes and impact. (K2, S2)	Critiques the suitability and completeness of the theory of change and programme plan for the intended participants. (K2, S2)	Choose an item.
	Plans and designs a programme to meet the customer requirements and ensure that they comply with legislation and policies, address the needs of participants, apply relevant theories, evaluation and research data, and the approach to outdoor learning used in their workplace. (K3, S3, K4, S4, K5, K6, K7)	Critiques how relevant theories, evidence and approaches taken within their workplace are effective in meeting the needs of participants, customers and stakeholders. (K5, K6, K7)	
Comments on evidence presented to justify assessment decisions			

Key area	Pass criteria	Distinction criteria	Outcome
Customer Proposal Report - Grading			
Organisation and risk management	Summarises how their programme plan complies with workplace policies and procedures and justifies the approach taken to creating risk benefit assessments that demonstrate how any significant risks to the health and safety of those involved can be managed. (K8, K9, S5)	Evaluates the impact of workplace policies and procedures on the creation of risk-benefit assessments that reduce risks whilst also enabling the intended benefits to be achieved. (K8, K9)	Choose an item.
Comments on evidence presented to justify assessment decisions			

Key area	Pass criteria	Distinction criteria	Outcome
Customer Proposal Report - Grading			
Decision making	Explains their planned approach to leading the participant group in the outdoors and how they will use reflective processes when making decisions and responding to: situational demands; dynamic changes in environmental conditions or the group; and emergency situations. (K11, K12, K13)	Justifies their approach to decision making and judgement in the outdoors and the benefits and limitations of their proposed instruction, teaching, coaching and mentoring approaches. (K12, K14)	Choose an item.
Comments on evidence presented to justify assessment decisions			

Key area	Pass criteria	Distinction criteria	Outcome
Customer Proposal Report - Grading			
Planning for learning	Summarises the chosen instruction, teaching, coaching and mentoring approaches and the assessment evidence and methods that will be used to facilitate participants progress towards achieving the outcomes. (K14, K16)		Choose an item.
Comments on evidence presented to justify assessment decisions			

Presentation with questions - Grading			
Communication	Leads meetings, delivers presentations and communicates clearly, confidently and concisely in written and verbal forms appropriate to the audience. (K25, S20, S21)		Choose an item.
Comments on evidence presented to justify assessment decisions			

Overall summary on evidence presented to justify assessment decisions
Customer Proposal Report Click or tap here to enter text.
Presentation Click or tap here to enter text.
Question and answer session Click or tap here to enter text.

Post assessment

- The apprentice must **not** be given an indication of what grade they may have achieved as the recommended grade to be awarded is subject to internal quality assurance by Open Awards. However, the IEPA must provide the apprentice of an indication as to when they can expect to receive their results.
- The IEPA must clearly explain the appeals, retakes and resits process to the apprentice.

Notes on grading

All pass criteria are required to be achieved to achieve a Pass; if they are not all achieved, the outcome is a Fail.

All pass and all distinction criteria are required to be achieved to achieve a Distinction

No. of pass criteria not met	Click or tap here to enter text.
No. of pass criteria met	Click or tap here to enter text.
No. of distinction criteria not met	Click or tap here to enter text.
No. of distinction criteria met	Click or tap here to enter text.
Recommend grade awarded	Choose an item.

The apprentice must **not** be given an indication of what grade they may have achieved as the recommended grade to be awarded is subject to internal quality assurance by Open Awards.

Developmental feedback for improvement in the event of a recommended Fail grade (This will be sent by Open Awards to the apprentice and employer)				
Click or tap here to enter text.				
Recommend (Select from dropdown menu)	**Resit**	Choose an item.	**Retake**	Choose an item.

Confirmation

I confirm that this is an accurate record of the assessment undertaken and that the evidence presented during the assessment by the apprentice meets the requirements of the standard for authenticity, currency, sufficiency, independence, reliability and validity.

IEPA Signature:	Click or tap here to enter text.	Date:	Click or tap to enter a date.
Name of LIEPA (if sampled)	Click or tap here to enter text.	Date:	Click or tap to enter a date.
Signature of LIEPA	Click or tap here to enter text.	LIEPA Ref:	Click or tap here to enter text.

Appendix 9 Observation with Questions Assessment Record

Observation with Questions Assessment Record

Apprentice name:	Click or tap here to enter text.
Job title/ role:	Click or tap here to enter text.
ULN number:	Click or tap here to enter text.
Employer/ Provider name:	Click or tap here to enter text.
Apprenticeship standard:	**ST0945 Outdoor Learning Specialist**

Introductory notes

- The observation must be carried out under controlled conditions in a suitable environment.

- The IEPA must introduce themselves and confirm their identity to the apprentice and employer/ representative (and others present if appropriate).

- The IEPA must agree with the employer/ representative how disruptions will be managed (e.g., alarms and emergencies) including confirming evacuation procedures.

- The apprentice must provide photographic proof of their identity before the assessment commences. Where this is not provided, the assessment must **not** proceed.

- If at this stage the IEPA believes there is a conflict of interest, the assessment should **not** proceed and they should contact Open Awards for guidance.

- If reasonable adjustments have been requested and approved by Open Awards, the IEPA should record this and confirm that the apprentice is aware of those adjustments before starting.

- If the observation is undertaken remotely, please record the system used (e.g., Zoom, MS Teams) and the location of both the IEPA and the apprentice.

- The IEPA should confirm the apprentice is ready to be assessed and understands the assessment parameters.

- The observation with questions will last for **150 minutes**, plus 10% (at the discretion of the independent assessor) if required, to allow the apprentice to complete their last point.

- The observation will typically last for **120 minutes**, and the questioning will typically last for **30 minutes**. The discretionary additional 10% time (**15 minutes**) can be allocated in any proportion across the observation and questioning.

The apprentice must be observed undertaking the following activities during the observation.

Activity 1: Briefing an allocated programme delivery team to ensure the needs of the customer and outcomes of the programme are understood and actively worked towards.

Activity 2: Leading individual and/or group learning outdoors using safe activity instruction and professional judgement to enable all participants to contribute and respond to changing conditions and needs.

Activity 3: Facilitating and engaging participants in the learning process to provide an equal and inclusive learning experience that supports participants to achieve the intended outcomes of the programme.

Activity 1 date & start time:	Click or tap here to enter text.	Activity 1 finish time:	Click or tap here to enter text.
Activity 2 date & start time:	Click or tap here to enter text.	Activity 2 finish time:	Click or tap here to enter text.
Activity 3 date &start time:	Click or tap here to enter text.	Activity 3 finish time:	Click or tap here to enter text.
Q&A start time:	Click or tap here to enter text.	Q&A finish time:	Click or tap here to enter text.

Activity 1: Briefing an allocated programme delivery team to ensure the needs of the customer and outcomes of the programme are understood and actively worked towards.					
KSB group	Pass criteria	Distinction criteria	Observed	Question & Answer session	Overall judgement
Managing programmes (S6, K10)	Demonstrates motivating and directing allocated staff to deliver a programme that meets the customer and participants needs, required outcomes, and workplace policies and procedures.	NA	Choose an item.	Choose an item.	Choose an item.
Comments on evidence presented to justify assessment decisions					

Observation:

Questions asked:

Activity 2: Leading individual and/or group learning outdoors using safe activity instruction and professional judgement to enable all participants to contribute and respond to changing conditions and needs.

KSB group	Pass criteria	Distinction criteria	Observed	Question & Answer session	Overall judgement
Outdoor leadership (K15, S7, S8, S9, S10, B1, B2, B4)	Leads activities and experiences outdoors that champion participant safety and wellbeing and use varied content, tempo, direction and differentiated learning to enable all participants to contribute to and benefit from the activity and experience. (K15, S7, S8, B2)	Shows a personalised approach to leadership and instruction to meet the physical, mental and emotional safety and wellbeing needs of individual participants and the group. (K15, S7, S8)	Choose an item.	Choose an item.	Choose an item.
	Assesses situations as they occur and responds with professional judgement and decision making informed by data to deal with dynamic changes and solve problems associated with shifting conditions and needs whilst maintaining a positive professional and ethical approach with colleagues, participants and stakeholders. (S9, S10, B1, B4)	Evaluates their chosen approach to decision making and judgement in the session and alternatives that could have been taken to respond to a dynamic change in group, equipment, or environmental conditions. (S9)	Choose an item.	Choose an item.	Choose an item.
Environment (S16, S17, B5)	Champions environmental sustainability through practical care and conservation approaches in their instruction and leadership of the activity and experience. Assists participants to connect with and protect the environment. (S16, S17, B5)		Choose an item.	Choose an item.	Choose an item.
Comments on evidence presented to justify assessment decisions					

Observation:

Questions asked:

Activity 3: Facilitating and engaging participants in the learning process to provide an equal and inclusive learning experience that supports participants to achieve the intended outcomes of the programme.					
KSB group	**Pass criteria**	**Distinction criteria**	**Observed**	**Question & Answer session**	**Overall judgement**
Facilitating learning (K17, K18, S11, S12, S13, S14, B3)	Creates an equal and inclusive learning experience that supports participant engagement and achievement. (K18, S11)	Evaluates the relevance of their chosen approaches to facilitating learning and how their approach impacts on participant engagement, achievement and inclusion. (S11, S12)	Choose an item.	Choose an item.	Choose an item.
		Justifies the steps that could be taken to achieve greater equality, diversity and inclusion within the organisation and the wider sector and the positive impact that may have. (K18)	Choose an item.	Choose an item.	Choose an item.
	Uses relevant facilitation approaches and theories of learning and development that supports the intended outcomes of a programme and encourages participants to achieve their potential. (S12, S13, B3)		Choose an item.	Choose an item.	Choose an item.
	Delivers timely, evidence-based outcome focused feedback that is meaningful to the participants and assists them in progressing towards intended outcomes. (K17, S14)		Choose an item.	Choose an item.	Choose an item.
Comments on evidence presented to justify assessment decisions					
Observation:					
Questions asked:					

Post assessment

- The apprentice must **not** be given an indication of what grade they may have achieved as the recommended grade to be awarded is subject to internal quality assurance by Open Awards. However, the IEPA must provide the apprentice of an indication as to when they can expect to receive their results.
- The IEPA must clearly explain the appeals, retakes and resits process to the apprentice.

Notes on grading

Each pass and distinction criterion must only be achieved once in respective activities to be deemed to have been achieved.

- All pass criteria are required to be achieved to achieve a Pass; if they are not all achieved, the outcome is a Fail.

No. of pass criteria not met	Click or tap here to enter text.
No. of pass criteria met	Click or tap here to enter text.
Recommend grade awarded	Choose an item.

The apprentice must **not** be given an indication of what grade they may have achieved as the recommended grade to be awarded is subject to internal quality assurance by Open Awards.

Developmental feedback for improvement in the event of a recommended Fail grade (This will be sent by Open Awards to the apprentice and employer)			
Click or tap here to enter text.			
Recommend (Select from dropdown menu)	**Resit**	Choose an item.	**Retake**	Choose an item.

Confirmation

I confirm that this is an accurate record of the assessment undertaken and that the evidence presented during the assessment by the apprentice meets the requirements of the standard for authenticity, currency, sufficiency, independence, reliability and validity.

IEPA Signature:	Click or tap here to enter text.	Date:	Click or tap to enter a date.
Name of LIEPA (if sampled)	Click or tap here to enter text.	Date:	Click or tap to enter a date.
Signature of LIEPA	Click or tap here to enter text.	LIEPA Ref:	Click or tap here to enter text.

All information provided on this form will be held securely and only used for the purposes provided. Full details on how we use and protect your data are available in our Privacy Notice.

Open Awards tries to meet the highest standards when collecting and using personal information. Customers are encouraged to email info@openawards.org.uk if you believe any data to be incorrect, unfair, misleading or inappropriate.

Appendix 10 Professional Discussion Assessment Record

Professional Discussion Assessment Record

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Apprentice name:	Click or tap here to enter text.
ILR number:	Click or tap here to enter text.
Employer name	Click or tap here to enter text.
Apprenticeship standard:	**ST0945 Outdoor Learning Specialist**
IEPA name:	Click or tap here to enter text.
Location:	Click or tap here to enter text.
Date of assessment:	Click or tap to enter a date.

Photographic proof of identity provided:	Choose an item.	**Reasonable adjustments approved**	Choose an item.
Start time:	Click or tap here to enter text.	**Finish time:**	Click or tap here to enter text.

Introductory notes

- The professional discussion must be carried out under controlled conditions in a suitable environment.
- The IEPA must have reviewed the apprentice's portfolio in advance.
- The IEPA must introduce themselves and confirm their identity to the apprentice and employer/ representative (and others present if appropriate).
- The IEPA must agree with the employer/ representative how disruptions will be managed (e.g., alarms and emergencies) including confirming evacuation procedures.
- The apprentice must provide photographic proof of their identity before the professional discussion commences. Where this is not provided, the assessment must **not** proceed.
- If at this stage the IEPA believes there is a conflict of interest, the assessment should **not** proceed and they should contact Open Awards for guidance.
- If reasonable adjustments have been requested and approved by Open Awards, the IEPA should record this and confirm that the apprentice is aware of those adjustments before starting.
- If the professional discussion is undertaken remotely, please record the system used (e.g., Zoom, MS Teams) and the location of both the IEPA and the apprentice.
- The IEPA must confirm the apprentice is ready to be assessed and understands the assessment parameters.
- The professional discussion **must last for 40 minutes** (+10% at the IEPAs discretion to allow an apprentice to finish the answer they are giving).
- The IEPA must ask the apprentice a minimum of 6 open questions.

Key area	Pass criteria	Distinction criteria	Question reference	Outcome
a. Customer needs: Identifying programme needs and expectations *1 question*	Describes a range of methods to identify and analyse the programme needs and expectations of customers, participants and stakeholders. (K1, S1)			Choose an item.
Comments on evidence presented to justify assessment decisions				

Key area	Pass criteria	Distinction criteria	Question reference	Outcome
b. Effective relationships: Strategies for building relationships and ensuring good customer service *1 question*	Explains strategies they use for building and maintaining effective relationships, resolving conflicts and ensuring good customer service and promoting the work of the organisation. (K22, K23, K24,)	Analyses barriers to effective relationships and how they are overcome. (K22)		Choose an item.
Comments on evidence presented to justify assessment decisions				

Key area	Pass criteria	Distinction criteria	Question reference	Outcome
c. Technology: Digital technologies that can be used to support the delivery of outdoor learning. *1 question*	Analyses a range of digital technologies that can be used to support the delivery of outdoor learning sessions to achieve the intended outcomes of a programme. (K19, S15)	Evaluates the impact and interactions of a range of digital technologies and how they have used a combination of these to produce an intended outcome for a programme. (K19, S15)		Choose an item.
Comments on evidence presented to justify assessment decisions				

Key area	Pass criteria	Distinction criteria	Question reference	Outcome
d. Environment: The outdoor environment they work in *1 question*	Explains the attributes and qualities of the outdoor environment they work in and the effects of changes due to climate, social history and local weather. (K20)			Choose an item.
Comments on evidence presented to justify assessment decisions				

Key area	Pass criteria	Distinction criteria	Question reference	Outcome
e. Evaluation: evaluating outdoor learning programmes *1 question*	Summarises the methods they have used to gather and report on the qualitative and quantitative data outputs, outcomes and impacts of an outdoor learning programme. Explains how to apply that data in programme planning and leadership, quality assurance, and organisational improvement. (K21, S18, S19)	Critically evaluates medium- and long-term options for organisational changes and improvements using data from personal experience, research and evaluation to justify suggestions. (S18, S19)		Choose an item.
Comments on evidence presented to justify assessment decisions				

Key area	Pass criteria	Distinction criteria	Question reference	Outcome
f. Professional practice: The apprentices' future contribution to challenges faced by Outdoor Learning *1 question*	Explains their approach to ethics and reflective practice and what influences their development as a professional. (K26, S22) Explains how their personal values and beliefs compliment or conflict with the issues and challenges faced by the Outdoor Learning sector and their own future goals. (S23, K27)	Articulates an ethical dilemma with a participant or stakeholder and evaluates the pros and cons of different courses of action. (K26)		Choose an item.
Comments on evidence presented to justify assessment decisions				

Overall comments on evidence presented to justify assessment decisions

Click or tap here to enter text.

Post assessment

- The apprentice must **not** be given an indication of what grade they may have achieved as the recommended grade to be awarded is subject to internal quality assurance by Open Awards. However, the IEPA must provide the apprentice of an indication as to when they can expect to receive their results.
- The IEPA must clearly explain the appeals, retakes and resits process to the apprentice.

Notes on grading

All pass criteria are required to be achieved to achieve a Pass; if they are not all achieved, the outcome is a Fail.

All pass and all distinction criteria are required to be achieved to achieve a Distinction

No. of pass criteria not met	Click or tap here to enter text.
No. of pass criteria met	Click or tap here to enter text.
No. of distinction criteria not met	Click or tap here to enter text.
No. of distinction criteria met	Click or tap here to enter text.
Recommend grade awarded	Choose an item.

Developmental feedback for improvement in the event of a recommended Fail grade **(To be sent by Open Awards to the apprentice and employer)**			
Click or tap here to enter text.			
Recommend **(Select from dropdown menu)**	**Resit** Choose an item.	**Retake**	Choose an item.

Confirmation

I confirm that this is an accurate record of the assessment undertaken and that the evidence presented during the assessment by the apprentice meets the requirements of the standard for authenticity, currency, sufficiency, independence, reliability and validity.

IEPA Signature:	Click or tap here to enter text.	Date:	Click or tap to enter a date.
Name of IQA (if sampled)	Click or tap here to enter text.	Date:	Click or tap to enter a date.
Signature of IQA	Click or tap here to enter text.	IQA Ref:	Click or tap here to enter text.

Appendix 11 EPA Planning Form

EPA Planning Form

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This form is applicable to any End-point assessment (EPA) activity where the assessment(s) is undertaken at a venue not directly managed by Open Awards and to which the independent End-point IEPA (IEPA) is required to attend in-person (i.e., the assessment(s) is undertaken face-to-face and not remotely).

The form must be fully completed by the provider or employer (as appropriate) and uploaded to the Open Awards Secure Portal at the same time as the assessment(s) is booked. Where remedial actions are identified, these must be addressed prior to the assessment day.

Full address of assessment venue	Click or tap here to enter text.
Location IEPA should report to upon arrival	This is important on large sites where there may be multiple receptions/ entrances. E.g., "*Reception in Building 'C' on the attached map*" Click or tap here to enter text.
Name of contact person at venue	This person will be responsible for meeting the IEPA on arrival, providing an appropriate health & safety briefing and must be available throughout the assessment(s) to deal with queries from the IEPA or emergencies Click or tap here to enter text.
Telephone of contact person at venue	Landline Click or tap here to enter text.
	Mobile Click or tap here to enter text.
Access arrangements	Is there anything the IEPA should be aware of. E.g., postcode to use with Sat Nav if different from above, car parking arrangements on/ off site, access from nearest train station Click or tap here to enter text.
Specific requirements the IEPA should be aware of	E.g., is PPE required and if so, is the IEPA expected to provide this or will it be provided for them Click or tap here to enter text.
Name of person completing this form	Click or tap here to enter text.
Job title/ position	Click or tap here to enter text.
Date form completed and uploaded to Open Awards Portal	Click or tap to enter a date.

Any other relevant information that would help the IEPA plan for the EPA. E.g., challenging customers may be present or goods delivery is expected on the day of assessment. Click or tap here to enter text.

	Yes/ No	If 'No', what remedial actions will be put in place to address this prior to the assessment(s)
There is a current health & safety policy in place for the venue which covers the EPA activities, the apprentice, the IEPA and other visitors undertaking quality assurance of the assessment(s)	Choose an item.	Click or tap here to enter text.
There is appropriate liability insurance in place which covers both the apprentice, IEPA and other visitors undertaking quality assurance of the assessment(s)	Choose an item.	Click or tap here to enter text.
The provider/ employer will undertake an appropriate risk assessment relevant to the assessment(s) and share this with both the apprentice and the IEPA	Choose an item.	Click or tap here to enter text.
The apprentice will have access to any Personal Protective Equipment required and received prior training in its use and storage. This PPE will be fit-for-purpose.	Choose an item.	Click or tap here to enter text.
There is adequate, accessible and signed posted first aid provision including first aid personnel and medical supplies available on the day of the assessment(s)	Choose an item.	Click or tap here to enter text.
An emergency contact at the venue will be available for duration of the EPA	Choose an item.	Click or tap here to enter text.
There are appropriate means of fire detection and raising the alarm in the event of a fire	Choose an item.	Click or tap here to enter text.
There is an emergency procedure (e.g., fire or first aid) in place which will be communicated to the apprentice and IEPA before the assessment(s) commence	Choose an item.	Click or tap here to enter text.
The venue and the assessment environment are safe and hazards appropriately managed in line with current best practice	Choose an item.	Click or tap here to enter text.
Welfare facilities (e.g., toilets, washing, eating and changing) are adequate, safe, healthy, clean and accessible to the IEPA	Choose an item.	Click or tap here to enter text.
All necessary safety notices (e.g., warning signs, fire-related, first aid) are displayed	Choose an item.	Click or tap here to enter text.
All machinery and equipment required is in good working order, meets appropriate legal standards and has been maintained by a competent person	Choose an item.	Click or tap here to enter text.

Appendix 12 Remote assessment

Open Awards recognises that remote assessment may present an attractive proposition to employers to overcome workplace challenges, e.g., limited physical access to enable the IEPA to observe the apprentice.

However, remote assessment itself has challenges and Open Awards are likely to require confirmation or reassurance that:

- remote observations etc., can be live-streamed, not recorded.
- remote assessment will be supported by video conferencing facilities/ technology which is sufficiently stable to enable the apprentice and IEPA to effectively communicate.
- imagery will be of sufficiently high-quality resolution to allow an IEPA to clearly view in detail the apprentice and any evidence.
- the technology used will accommodate the maximum possible duration of the assessment; not the assessment governed by the capacity of the technology.
- any live-stream must remain on the apprentice throughout the assessment.
- the employer accepts that any break in the live-stream or where the IEPA is unable to see the apprentice or communicate with them may result in the assessment being cancelled and count as an assessment attempt; the employer may be required to pay for the resit.
- the employer will be able to supply at their expense someone to support the observation workplace (e.g., holding a camera) who does not have a supervisory relationship with the apprentice and who has sufficient health and safety awareness so as not endanger themselves or others whilst they are undertaking the support role.

The above list is not exhaustive and may vary depending upon the assessment method and associated requirements set out in the assessment plan. Where the assessment plan does not explicitly allow for assessment to be undertaken remotely, Open Awards may have to seek clarification from the External Quality Assurance Provider as to whether remote assessment is permissible.

Therefore, employers must liaise directly with Open Awards at the earliest possible opportunity to enable a determination to be made as to whether remote assessment is viable and valid.

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