Portfolio Matrix

Highfield Level 4 End-Point Assessment for ST0310 Associate Project Manager

Apprentice Details

Name	
Employer	
Training Provider	

Portfolio of evidence

It is a requirement of this assessment plan that a portfolio of evidence is submitted at Gateway to support the presentation and professional discussion. This is not assessed. Please see the EPA-kit for more information on the requirements for the portfolio of evidence.

Please indicate below which piece of evidence is mapped to each KSB covered in the presentation or professional discussion. Please use the same reference as the file name to ensure the correct piece of evidence can be located.

Either/Or Criteria

The following criteria may be covered by **either** the presentation **or** the proffesional discussion.

KSB	Assessment method	Evidence Reference	Evidence location
Governance			
Explain the policies, procedures and regulations relevant to their organisation (G1)			
Describe the different types of organisational structures and responsibilities (G2)			
Explain how different functions and project phases can affect different types of projects (G3)			
Describe how governance can control and manage the successful delivery of projects (G4)			

KSB	Assessment method	Evidence Reference	Evidence location
Explain the significance of the project management plan (PMP) (G5)			
Monitor projects and report cycle (G6)			
Assess, track and interpret performance by the application of progress monitoring techniques (G7)			
Analyse and manage the status of information (G8)			

KSB	Assessment method	Evidence Reference	Evidence location
Stakeholder and Communications Management			
Compare how different perspectives and interests, along with the level of influence of a stakeholder, can affect the outcome of a project (ST1)			
Describe the key context of a project communication plan (ST2)			
Evaluate the effectiveness of a project communication plan when managing different stakeholders (ST3)			
Manage stakeholders, taking into account their particular interests and levels of influence (ST4)			
Manage conflicts and negotiations (ST5)			
Communicate to a variety of different audiences (ST6)			
Contribute to negotiations relating to project objectives (ST7)			

KSB	Assessment method	Evidence Reference	Evidence location
Budgeting and cost control			
Explain how your organisation funds different departments within its budget (BC1)			
Explain how overheads can affect project budgets (BC2)			

KSB	Assessment method	Evidence Reference	Evidence location
Describe the differences between indirect, direct, fixed, and variable costs (BC3)			
Describe how to work out an overall budget for a project (BC4)			
Provide examples of tracking systems for actual costs, accruals and committed costs (BC5)			
Outline alternative cost breakdowns to provide for graphical representations and performance management (BC6)			
Develop and agree project budgets (BC7)			
Monitor forecast and actual costs against the project budget and effectively control changes (BC8)			
Support funding submissions (BC9)			

KSB	Assessment method	Evidence Reference	Evidence location
Business case and benefits			
Explain how a business case should be prepared and maintained, including benefits management (BB1)			
Contribute to the preparation or maintenance of a business case, including achieving the required outcomes (BB2)			

KSB	Assessment method	Evidence Reference	Evidence location
Scope Management			
Summarise requirements management, its purpose within a project and its importance within scope management (SC1)			
Evaluate alternative scope management methods to learn from the past and improve future delivery (SC2)			
Describe the approach, purpose, and benefit of project scope change control (SC3)			

KSB	Assessment method	Evidence Reference	Evidence location
Outline how baseline change management and configuration management apply within scope management and the reasons for their importance (SC4)			
Determine the scope of a project (SC5)			
Control and manage any changes made to the scope of a project, including assumptions, dependencies, and constraints (SC6)			

KSB	Assessment method	Evidence Reference	Evidence location
Consolidated planning			
Describe the purpose of consolidated plans to support overall management, taking account of lessons learnt (CP1)			
Compare different formats that can be used for consolidated plans (CP2)			
Explain how consolidated plans balance fundamental components of scope, schedule, resources, budgets, risks, and quality requirements (CP3)			
Consolidate and document the fundamental components of projects (CP4)			
Monitor progress against the consolidated plan and refine as appropriate (CP5)			
Implement the change control process where relevant (CP6)			

KSB	Assessment method	Evidence Reference	Evidence location
Schedule management			
Summarise scheduling and estimating for project activities including how they can be quality assessed (SM1)			
Describe how progress monitoring and metrics should be used to assess work performed against the schedule (SM2)			

KSB	Assessment method	Evidence Reference	Evidence location
Compare different schedule management methods to evaluate and revise activities to improve confidence in delivery (SM3)			
Prepare and maintain schedules for activities aligned to project delivery (SM4)			

KSB	Assessment method	Evidence Reference	Evidence location
Risk and issue management			
Evaluate the need for a risk assessment plan and describe how one should be implemented (RI1)			
Provide examples of risk management methods and techniques that could be used to identify and prioritise threats (RI2)			
Describe mitigation actions used to minimise risk impacts and optimise benefits by managing opportunities (RI3)			
Identify and monitor project risk or opportunity (RI4)			
Plan and implement responses to a project risk or opportunity (RI5)			
Contribute to a risk management plan (RI6)			
Respond to and manage issues within a defined governance structure (RI7)			

KSB	Assessment method	Evidence Reference	Evidence location
Contract management and procurement			
Describe the nature of contracts (CM1)			
Explain the implications of contracts for contracting organisations (CM2)			
Provide examples of different procurement processes (CM3)			
Outline the legal and ethical means for managing contracts (CM4)			
Facilitate a procurement process (CM5)			

Contribute to the definition of contractual agreements (CM6)			
Contribute to managing a contract (CM7)			

KSB	Assessment method	Evidence Reference	Evidence location
Quality management			
Summarise the importance and need for quality management processes, assurance, and improvements (QM1)			
Describe the different types of project assurance that are applied to your projects (QM2)			
Outline your organisations approach to continuous improvement (QM3)			
Develop a quality management plan (QM4)			
Manage project assurance and contribute to peer reviews (QM5)			
Utilise an organisation's continual improvement process including lessons learned (QM6)			

KSB	Assessment method	Evidence Reference	Evidence location
Resource management			
Understanding of how key project resources are identified through resource analysis approaches (RM1)			
Describe your organisations process for resource allocation (RM2)			
Summarise how resource management plans can assist in the monitoring and controlling of a project through the project lifecycle (RM3)			
Develop resource management plans for project activities (RM4)			
Acquire and manage resources including commitment acceptance (RM5)			

Monitor progress against plans (RM6)			

KSB	Assessment method	Evidence Reference	Evidence location
Context			
Provide examples of the different contexts in which projects can be delivered, including health, safety and environment management (C1)			
Describe the interdependencies between project(s), programme(s) and portfolio management (C2)			
Describe the different project phases and key review points that can be applied across the full life cycle (C3)			
Apply project management skills in the context of their organisation (C4)			

KSB	Assessment method	Evidence Reference	Evidence location
Collaboration and team work			
Understand their role as part of an integrated team (CT1)			
Be effective in their role as part of an integrated team (CT2)			

KSB	Assessment method	Evidence Reference	Evidence location
Leadership			
Describe the vision and values of the project (L1)			
Summarise how the project links to the objectives (L2)			
Explain how the project objectives should be effectively communicated and reinforced to team members and stakeholders (L3)			
Provide examples of different leadership styles (L4)			

Describe the qualities of different leadership styles (L5)			
Explain the importance of motivation on team performance (L6)			
Describe the characteristics of the working environment which can encourage and sustain high performance (L7)			
Communicate the direction of the business (L8)			
Support the vision for project delivery (L9)			

KSB	Assessment method	Evidence Reference	Evidence location
Communication			
Work effectively with and influencing others, taking account of diversity and equality (CO1)			
Influence and facilitate effective team performance (CO2)			

KSB	Assessment method	Evidence Reference	Evidence location
Drive for Results			
Demonstrate clear commitment to achieving results and improving performance (DR1)			

KSB	Assessment method	Evidence Reference	Evidence location
Integrity, ethics, compliance and professionalism			
Promote the wider public good in all actions (IN1)			
Act in a morally, legally, and socially appropriate manner (IN2)			
Promote and model the highest standards of professional integrity, ethics, trust, and continued development (IN3)			

Apprentice Declaration

I confirm that the evidence contained in this portfolio of evidence is all my own work and any assistance given and/or sources used have been acknowledged.

Signed by apprentice (name)	Signature	Date