

DRAFT END-POINT ASSESSMENT PLAN FOR THE WOOD MACHINIST APPRENTICESHIP

APPRENTICESHIP REFERENCE NUMBER	LEVEL OF THIS END-POINT ASSESSMENT (EPA)	INTEGRATION
ST0976	2	None

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Introduction and overview

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This document explains the requirements for end-point assessment (EPA) for the wood machinist apprenticeship. End-point assessment organisations (EPAOs) must follow this when designing and delivering the EPA.

Wood machinist apprentices, their employers and training providers should read this document. A full-time wood machinist apprentice typically spends 24 months on-programme. The apprentice must spend at least 12 months on-programme and complete the required amount of off-the-job training in line with the apprenticeship funding rules.

The EPA should be completed within an EPA period lasting typically 3 months.

The apprentice must complete their training and meet the gateway requirements before starting their EPA. The EPA will assess occupational competence.

An approved EPAO must conduct the EPA for this apprenticeship. Employers must work with the training provider to select an approved EPAO from the apprenticeship providers and assessment register (APAR).

This EPA has 2 assessment methods.

The grades available for each assessment method are below.

Assessment method 1 - observation with questions:

- fail
- pass

Assessment method 2 - interview underpinned by a portfolio of evidence:

- fail
- pass
- distinction

The result from each assessment method is combined to decide the overall apprenticeship grade.

The following grades are available for the apprenticeship:

- fail
- pass
- distinction

EPA summary table

[Edit epa gateway form](#)[Edit available grades form](#)[Edit overall epa grading form](#)[Edit re-sits and re-takes form](#)

**On-programme -
typically 24 months**

The apprentice must:

	<ul style="list-style-type: none"> • complete training to develop the knowledge, skills and behaviours (KSBs) outlined in this apprenticeship’s standard • complete training towards English and mathematics qualifications in line with the apprenticeship funding rules • compile a portfolio of evidence
End-point assessment gateway	<p>The apprentice’s employer must be content that the apprentice has attained sufficient KSBs to complete the apprenticeship.</p> <p>The apprentice must:</p> <ul style="list-style-type: none"> • confirm they are ready to take the EPA • have achieved English and mathematics qualifications in line with the apprenticeship funding rules <p>For the interview underpinned by a portfolio of evidence, the apprentice must submit a portfolio of evidence.</p> <p>The apprentice must submit the gateway evidence to their EPAO, including any organisation specific policies and procedures requested by the EPAO.</p>
End-point assessment - typically 3 months	<p>The grades available for each assessment method are below</p> <p>Observation with questions:</p> <ul style="list-style-type: none"> • fail • pass <p>Interview underpinned by a portfolio of evidence:</p> <ul style="list-style-type: none"> • fail • pass • distinction <p>Overall EPA and apprenticeship can be graded:</p> <ul style="list-style-type: none"> ○ fail ○ pass ○ distinction
Re-sits and re-takes	<ul style="list-style-type: none"> • Re-take and re-sit grade cap: pass • Re-sit timeframe: typically 3 months • Re-take timeframe: typically 6 months

Duration of end-point assessment period

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The EPA is taken in the EPA period. The EPA period starts when the EPAO confirms the gateway requirements have been met and is typically 3 months.

The EPAO should confirm the gateway requirements have been met and the EPA should start as quickly as possible.

EPA gateway

Edit epa gateway form

The apprentice’s employer must be content that the apprentice is occupationally competent. That is, they are deemed to be working at or above the level set out in the apprenticeship standard and

ready to undertake the EPA. The employer may take advice from the apprentice's training provider, but the employer must make the decision. The apprentice will then enter the gateway. The apprentice must meet the gateway requirements before starting their EPA.

They must:

- confirm they are ready to take the EPA
- have achieved English and mathematics qualifications in line with the apprenticeship funding rules
- submit a [portfolio of evidence](#) for the [interview underpinned by a portfolio of evidence](#)

Portfolio of evidence requirements:

The apprentice must compile a portfolio of evidence during the on-programme period of the apprenticeship. It should only contain evidence related to the KSBs that will be assessed by this assessment method. It will typically contain 10 discrete pieces of evidence. Evidence must be mapped against the KSBs. Evidence may be used to demonstrate more than one KSB; a qualitative as opposed to quantitative approach is suggested.

Evidence sources may include:

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

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

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

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

Gateway evidence must be submitted to the EPAO, along with any organisation specific policies and procedures requested by the EPAO.

Order of assessment methods

[Edit order of assessment methods form](#)

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.

Observation with questions

Overview

In the observation with questions, an independent assessor observes the apprentice in their workplace and asks questions. The apprentice completes their day-to-day duties under normal working conditions. Simulation is not allowed. It gives the apprentice the opportunity to demonstrate the KSBs mapped to this assessment method.

Rationale

This assessment method is being used because:

- this is a practical role which can be demonstrated through completing tasks
- it can assess KSBs holistically and objectively
- it allows for consistency of opportunity for apprentices to demonstrate their competence against the mapped KSBs
- it should give employers assurance about an apprentice's competence as it takes place in a real work setting
- the familiar environment should allow the apprentice to perform at their best
- it is cost effective, tasks completed during the observation should contribute to workplace productivity and it makes use of the employer's resources and equipment

Delivery

The observation with questions must be structured to give the apprentice the opportunity to demonstrate the KSBs mapped to this assessment method to the highest available grade.

An independent assessor must conduct and assess the observation with questions.

The independent assessor must only observe one apprentice at a time to ensure quality and rigour.

They must be as unobtrusive as possible.

The EPAO must give the apprentice 2 weeks' notice of the observation with questions.

The observation must take 3 hours.

The observation may be split into discrete sections held on the same working day.

The EPAO must manage invigilation of the apprentice during the assessment, to maintain security of the EPA, in line with their malpractice policy. This includes breaks and moving between locations.

The independent assessor must explain to the apprentice the format and timescales of the observation with questions before it starts. This does not count towards the assessment time.

The independent assessor should observe the following during the observation:

- compliance with health, safety and environmental regulations, standards and guidance
- work organisation and preparation
- follow work instructions and job specification
- selection, setting up and operation of machinery, tools and equipment
- manufacture and wood machining of furniture components and sub-assemblies, for example, for chairs, tables, desks and cabinets

Activity:

The wood machinist apprentice must complete all mandatory sections and four optional activities from pre-machining, machining and post-machining sections listed below.

The four optional activities must include two activities from the machining section and one from the pre-machining and one from the post-machining sections **OR** two from the machining section and two from the pre-machining section with the following requirements:

Mandatory:

- Measure and mark out materials
- Tooling - select, prepare and maintain wood-machining tooling
- Cutting - prepare, set up and operate cutting wood machinery
- Planing - prepare, set up and operate planes, such as, surface planer and thicknesser (can be a combined machine), four-sided planer or moulder
- Operation of wood machining machinery

Optional:

Pre-machining:

- **Calibrating** - calibrate measuring equipment
- **Jigs and templates** - use and maintain jigs and templates for furniture production
- **Profiling** - prepare, set up and operate profiling wood machinery such as, vertical spindle moulder, four-sided planer and moulder, high speed router, double-end tenoner, wood turning lathe, copying lathe, linear shaper or rotary shaper machines

Machining:

- **Boring** - prepare, set up and operate boring wood machinery, including single-head and multi head machines
- **Sanding** - sand materials for preparation prior to assembly, post-assembly and de-nibbing. Use of grit sizes and process of sanding including wide belt sander, overhead narrow belt sander, disc sander, bobbin sander, finisher or profile sander
- **Edge banding** - carry out edge banding processes including by hand, colour matching, timber and PVC lippings, calibration and finishing techniques.
- **Operate machinery and equipment** - prepare tools and equipment including tooling technology and calibration of measuring equipment
- **Joints** - prepare, set up and operate wood machinery to produce jointed wood and wood-based products, such as, chisel morticer, chain morticer, slot morticer, dovetailer, vertical spindle moulder, stair router, single-end tenoner, double-end tenoner, round-end tenoner, dowler or router

Post-machining:

- **Assembly** - assemble components or sub-assemblies of furniture products

These activities provide the apprentice with the opportunity to demonstrate the KSBs mapped to this assessment method.

The independent assessor must ask questions. Questioning can occur both during and after the observation.

The purpose of the questions is to assess the level of competence against the grading descriptors.

The time for questioning is included in the overall assessment time. The independent assessor must ask at least 5 questions. To remain as unobtrusive as possible, the independent assessor should ask questions during natural stops between tasks and after completion of work rather than disrupting the apprentice's flow. The independent assessor must create their own questions in line with the EPAO's training. Follow-up questions are allowed where clarification is required.

The independent assessor must ask questions about KSBs that were not observed to gather assessment evidence. These questions are in addition to the above set number of questions for the observation with questions and should be kept to a minimum.

The apprentice may choose to end the assessment method early. The apprentice must be confident they have demonstrated competence against the assessment requirements for the assessment method. The independent assessor or EPAO must ensure the apprentice is fully aware of all assessment requirements. The independent assessor or EPAO cannot suggest or choose to end the assessment methods early, unless in an emergency. The EPAO is responsible for ensuring the apprentice understands the implications of ending an assessment early if they choose to do so. The independent assessor may suggest the assessment continues. The independent assessor must document the apprentice's request to end the assessment early.

The independent assessor must make the grading decision. The independent assessor must assess the observation and responses to questions holistically when deciding the grade.

The independent assessor must keep accurate records of the assessment. They must record:

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

Assessment location

The observation with questions must take place in the apprentice's normal place of work for example, their employer's premises or a customer's premises. Equipment and resources needed for the observation must be confirmed to be available by the EPAO, who can liaise with the employer to provide these. They must be in good and safe working condition.

Questioning that occurs after the observation should take place in a suitable environment, for example a quiet room, free from distractions and influence.

Question and resource development

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

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

The EPAO must produce the following materials to support the observation with questions:

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

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

Interview underpinned by a portfolio of evidence

Edit interview underpinned by a portfolio of evidence form

Overview

In the interview, an independent assessor asks the apprentice questions. It gives the apprentice the opportunity to demonstrate the KSBs mapped to this assessment method.

Rationale

This assessment method is being used because:

- it assesses KSBs holistically and objectively
- it allows for the assessment of KSBs that do not occur on a predictable or regular basis
- it allows for assessment of responses where there are a range of potential answers
- it can be conducted remotely, potentially reducing cost

Delivery

The interview must be structured to give the apprentice the opportunity to demonstrate the KSBs mapped to this assessment method to the highest available grade.

An independent assessor must conduct and assess the interview.

The purpose of the independent assessor's questions will be to assess the apprentice's competence against the following themes:

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

- environmental and sustainability
- maintenance of tools, equipment, and machinery
- storage of tools, equipment, components and assemblies
- rectification, repair, and rework
- furniture industry, team working, communication, and inclusion
- continuous improvement
- quality assurance processes
- documentation and use of digital, and information technology
- learning and development opportunities

The EPAO must give an apprentice 2 weeks' notice of the interview.

The independent assessor must have at least 2 weeks to review the supporting documentation.

The apprentice must have access to their portfolio of evidence during the interview.

The apprentice can refer to and illustrate their answers with evidence from their portfolio of evidence however, the portfolio of evidence is not directly assessed.

The interview must last for 70 minutes. The independent assessor can increase the time of the interview by up to 10%. This time is to allow the apprentice to respond to a question if necessary.

The independent assessor must ask at least 9 questions. The independent assessor must create their own questions in line with the EPAO's training. Follow-up questions are allowed where clarification is required.

The apprentice may choose to end the assessment method early. The apprentice must be confident they have demonstrated competence against the assessment requirements for the assessment method. The independent assessor or EPAO must ensure the apprentice is fully aware of all assessment requirements. The independent assessor or EPAO cannot suggest or choose to

end the assessment methods early, unless in an emergency. The EPAO is responsible for ensuring the apprentice understands the implications of ending an assessment early if they choose to do so. The independent assessor may suggest the assessment continues. The independent assessor must document the apprentice's request to end the assessment early.

The independent assessor must make the grading decision.

The independent assessor must keep accurate records of the assessment. They must record:

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

Assessment location

The interview must take place in a suitable venue selected by the EPAO for example, the EPAO's or employer's premises.

The interview should take place in a quiet room, free from distractions and influence.

Question and resource development

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

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

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

The EPAO must produce the following materials to support the interview underpinned by a portfolio of evidence:

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

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

Grading

[Edit add grade descriptor form](#)[Edit mapping of ksbs to grade themes form](#)[Edit available grades form](#)

Observation with questions

Fail - does not meet pass criteria

THEME KSBS	PASS APPRENTICES MUST DEMONSTRATE ALL OF THE PASS DESCRIPTORS
Health, safety and workplace procedures K4 K5 K7 K8 S3 S4 S5 S7 B1	<p>Prioritises health and safety by applying safe systems of work, following risk assessments, in compliance with health and safety regulations, standards and guidance. (K4, K5, S4, S5, B1)</p> <p>Prepares and maintains the work area prior to starting work and sustains the maintenance of the area, during, and after the wood machining activity, following workplace operating procedures. (K7, K8, S3, S7)</p>
Work organisation and preparation K2 K3 S1 S2 B2	Takes ownership and plans the wood machining activity, selecting resources and materials, taken from the job specification, and outlining timescales to complete the needs of the task. (K2, K3, S1, S2, B2)
Machinery, tools, jigs and templates and equipment K9 K12 K14 S9 S14	<p>Selects, tools, equipment, and machinery in line with the needs of the task. (K9, S9)</p> <p>Sets up, and operates machinery in line with manufacturer's instructions, company procedures, and task requirements. (K12, K14, S14)</p>
Manufacturing and machining of furniture components and assemblies K15 K16 K17 K18 K19 K20 S11 S12 S13 S15 S16 S17	<p>Identifies and selects the materials needed for the wood machining activity in line with job specification and task requirements. (K15, S11)</p> <p>Selects and uses measurement and marking out tools on materials, in line with task requirements. (K17, S12)</p>

THEME KSBS	PASS APPRENTICES MUST DEMONSTRATE ALL OF THE PASS DESCRIPTORS
	<p>Carries out wood machining processes using conventional or CNC machinery and equipment to manufacture furniture components or sub-assemblies in line with task requirements. (K16, K18, S13, S15)</p> <p>Construct furniture components or sub-assemblies in line with job requirements and task requirements (K20, S16)</p> <p>Apply wood preparation techniques on inspected material surfaces. (K19, S17)</p>

Interview underpinned by a portfolio of evidence

Fail - does not meet pass criteria

THEME KSBS	PASS APPRENTICES MUST DEMONSTRATE ALL OF THE PASS DESCRIPTORS	DISTINCTION APPRENTICES MUST DEMONSTRATE ALL OF THE PASS DESCRIPTORS AND ALL OF THE DISTINCTION DESCRIPTORS
Environmental and sustainability K6 S6 B3	Describes how they comply with environmental and sustainability regulations and procedures, considering the environment and pollution, through the efficient use and management of resources.	Outlines how their environmental and sustainability considerations impact on the local environment. (K6, S6)

THEME KSBS	PASS APPRENTICES MUST DEMONSTRATE ALL OF THE PASS DESCRIPTORS	DISTINCTION APPRENTICES MUST DEMONSTRATE ALL OF THE PASS DESCRIPTORS AND ALL OF THE DISTINCTION DESCRIPTORS
	<p>Describes how they identify, handle and segregate resources for reuse, recycling and disposal. (K6, S6, B3)</p>	
<p>Maintenance of machinery, tools and equipment K11 K13 S10</p>	<p>Describes how they maintain the condition of tools and equipment. Describes how they check, inspect and perform routine, first line maintenance procedures on tools, equipment, and machinery in line with organisational procedures, or manufacturer's instructions. (K11, K13, S10)</p>	<p>Explains the importance of maintaining tools, equipment, and machinery and the impact on the business of not carrying out first line maintenance. (K11, K13, S10)</p>
<p>Storage of tools, equipment, materials, products and components K10 K22 S8 S20</p>	<p>Describes how they comply with the storage requirements for tools and equipment, considering the environment they are being stored in, in line with organisational requirements. (K10, S8)</p>	<p>None.</p>

THEME KSBS	PASS APPRENTICES MUST DEMONSTRATE ALL OF THE PASS DESCRIPTORS	DISTINCTION APPRENTICES MUST DEMONSTRATE ALL OF THE PASS DESCRIPTORS AND ALL OF THE DISTINCTION DESCRIPTORS
	<p>Describes how they pack, store and handle components and assemblies in line with organisational requirements. (K22, S20)</p>	
<p>Rectification, repair, and rework K21 S18</p>	<p>Describes how they carry out, rectification, repair, or rework to manufactured wood products or components in line with company procedures. (K21, S18)</p>	<p>Explains the impact on the business of not carrying out, rectification, repair, or rework to the manufactured wood products or components. (K21, S18)</p>
<p>Team working, communications, and inclusion K1 K26 K27 K28 K29 S23 S24 S25 S26 S27 B4 B5</p>	<p>Describes the furniture industry in their role and how they apply team working principles, and are team focussed to meet work goals. Describes how they report and escalate faults or issues in line with organisational procedures. (K1, K26, S23, S24, B4)</p> <p>Describes how they follow and support</p>	<p>Explains how their team working supports wider team and business goals. (K26, S23)</p>

THEME KSBS	PASS APPRENTICES MUST DEMONSTRATE ALL OF THE PASS DESCRIPTORS	DISTINCTION APPRENTICES MUST DEMONSTRATE ALL OF THE PASS DESCRIPTORS AND ALL OF THE DISTINCTION DESCRIPTORS
	<p>equity, diversity, and inclusion in their workplace in line with rules. (K27, S25, B5)</p> <p>Describes how they communicate with others using verbal techniques, in a way that is suitable for the context and supports task completion. (K28, S26)</p> <p>Describes how they communicate with colleagues and managers using written techniques. (K29, S27)</p>	
<p>Continuous improvement K25 S22</p>	<p>Describes how they support improvement through wood machining production by applying basic continuous improvement techniques. (K25, S22)</p>	<p>Explains how continuous improvement contributes to the business or the process. (K25, S22)</p>

THEME KSBS	PASS APPRENTICES MUST DEMONSTRATE ALL OF THE PASS DESCRIPTORS	DISTINCTION APPRENTICES MUST DEMONSTRATE ALL OF THE PASS DESCRIPTORS AND ALL OF THE DISTINCTION DESCRIPTORS
Quality assurance processes K23 S19	Describes how they follow quality assurance processes in line with organisational requirements. (K23, S19)	None.
Documentation and use of digital, and information technology K24 K30 S21 S28	Describes how they use electronic or paper documentation to record work in progress in line with organisational requirements. (K24, S21) Describes how they use information technology and digital systems to comply with GDPR and cyber security when carrying out work tasks. (K30, S28)	None.
Learning and development opportunities S29 B6	Describes how they have sought, undertaken and recorded learning and development activities to show	None.

THEME KSBS	PASS APPRENTICES MUST DEMONSTRATE ALL OF THE PASS DESCRIPTORS	DISTINCTION APPRENTICES MUST DEMONSTRATE ALL OF THE PASS DESCRIPTORS AND ALL OF THE DISTINCTION DESCRIPTORS
	continual personal and professional development in their role. (S29, B6)	

Overall EPA grading

[Edit overall epa grading form](#)

Performance in the EPA determines the overall grade of:

- fail
- pass
- distinction

An independent assessor must individually grade the observation with questions and interview underpinned by a portfolio of evidence in line with this EPA plan.

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

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

To achieve an overall pass, the apprentice must achieve at least a pass in all the assessment methods. To achieve an overall distinction, the apprentice must achieve a distinction in the interview underpinned by a portfolio of evidence, and a pass in the observation with questions assessment method.

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

OBSERVATION WITH QUESTIONS	INTERVIEW UNDERPINNED BY A PORTFOLIO OF EVIDENCE	OVERALL GRADING
Any grade	Fail	Fail
Fail	Any grade	Fail
Pass	Pass	Pass
Pass	Distinction	Distinction

Re-sits and re-takes

Edit re-sits and re-takes form

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

The employer and the EPAO should agree the timescale for a re-sit or re-take. A re-sit is typically taken within 3 months of the EPA outcome notification. The timescale for a re-take is dependent on how much re-training is required and is typically taken within 6 months of the EPA outcome notification.

Failed assessment methods must be re-sat or re-taken within a 6-month period from the EPA outcome notification, otherwise the entire EPA will need to be re-sat or re-taken in full.

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

The apprentice will get a maximum EPA grade of pass if they need to re-sit or re-take one or more assessment methods, unless the EPAO determines there are exceptional circumstances.

Roles and responsibilities

Edit roles and responsibilities form

ROLES	RESPONSIBILITIES
Apprentice	<p>As a minimum, the apprentice should:</p> <ul style="list-style-type: none">• complete on-programme training to meet the KSBs as outlined in the apprenticeship standard for a minimum of 12 months• complete the required amount of off-the-job training specified by the apprenticeship funding rules and as arranged by the employer and training provider• understand the purpose and importance of EPA• prepare for and undertake the EPA including meeting all gateway requirements
Employer	<p>As a minimum, the apprentice's employer must:</p> <ul style="list-style-type: none">• select the training provider• work with the training provider to select the EPAO• work with the training provider, where applicable, to support the apprentice in the workplace and to provide the opportunities for the apprentice to develop the KSBs• arrange and support off-the-job training to be undertaken by the apprentice• decide when the apprentice is working at or above the apprenticeship standard and is ready for EPA• ensure the apprentice is prepared for the EPA

ROLES	RESPONSIBILITIES
	<ul style="list-style-type: none"> • ensure that all supporting evidence required at the gateway is submitted in line with this EPA plan • confirm arrangements with the EPAO for the EPA in a timely manner, including who, when, where • provide the EPAO with access to any employer-specific documentation as required for example, company policies • ensure that the EPA is scheduled with the EPAO for a date and time which allows appropriate opportunity for the apprentice to meet the KSBs • ensure the apprentice is given sufficient time away from regular duties to prepare for, and complete the EPA • ensure that any required supervision during the EPA period, as stated within this EPA plan, is in place • ensure the apprentice has access to the resources used to fulfil their role and carry out the EPA for workplace based assessments • remain independent from the delivery of the EPA • pass the certificate to the apprentice upon receipt
EPAO	<p>As a minimum, the EPAO must:</p> <ul style="list-style-type: none"> • conform to the requirements of this EPA plan and deliver its requirements in a timely manner • conform to the requirements of the apprenticeship provider and assessment register • conform to the requirements of the external quality assurance provider (EQAP) • understand the apprenticeship including the occupational standard and EPA plan • make all necessary contractual arrangements including agreeing the price of the EPA • develop and produce assessment materials including specifications and marking materials, for example mark schemes, practice materials, training material • maintain and apply a policy for the declaration and management of conflict of interests and independence. This must ensure, as a minimum, there is no personal benefit or detriment for those delivering the EPA or from the result of an assessment. It must cover: <ul style="list-style-type: none"> ○ apprentices ○ employers

ROLES	RESPONSIBILITIES
	<ul style="list-style-type: none"> ○ independent assessors ○ any other roles involved in delivery or grading of the EPA • have quality assurance systems and procedures that ensure fair, reliable and consistent assessment and maintain records of internal quality assurance (IQA) activity for external quality assurance (EQA) purposes • appoint independent, competent, and suitably qualified assessors in line with the requirements of this EPA plan • appoint administrators, invigilators and any other roles where required to facilitate the EPA • deliver induction, initial and on-going training for all their independent assessors and any other roles involved in the delivery or grading of the EPA as specified within this EPA plan. This should include how to record the rationale and evidence for grading decisions where required • conduct standardisation with all their independent assessors before allowing them to deliver an EPA, when the EPA is updated, and at least once a year • conduct moderation across all of their independent assessors' decisions once EPAs have started according to a sampling plan, with associated risk rating of independent assessors • monitor the performance of all their independent assessors and provide additional training where necessary • develop and provide assessment recording documentation to ensure a clear and auditable process is in place for providing assessment decisions and feedback to all relevant stakeholders • use language in the development and delivery of the EPA that is appropriate to the level of the apprenticeship • arrange for the EPA to take place in a timely manner, in consultation with the employer • provide information, advice, and guidance documentation to enable apprentices, employers and training providers to prepare for the EPA • confirm the gateway requirements have been met before they start the EPA for an apprentice • arrange a suitable venue for the EPA • maintain the security of the EPA including, but not limited to, verifying the identity of the apprentice, invigilation and security of materials

ROLES	RESPONSIBILITIES
	<ul style="list-style-type: none"> • where the EPA plan permits assessment away from the workplace, ensure that the apprentice has access to the required resources and liaise with the employer to agree this if necessary • confirm the overall grade awarded • maintain and apply a policy for conducting appeals
Independent assessor	<p>As a minimum, an independent assessor must:</p> <ul style="list-style-type: none"> • be independent, with no conflict of interest with the apprentice, their employer or training provider, specifically, they must not receive a personal benefit or detriment from the result of the assessment • have, maintain and be able to evidence up-to-date knowledge and expertise of the occupation • have the competence to assess the EPA and meet the requirements of the IQA section of this EPA plan • understand the apprenticeship’s occupational standard and EPA plan • attend induction and standardisation events before they conduct an EPA for the first time, when the EPA is updated, and at least once a year • use language in the delivery of the EPA that is appropriate to the level of the apprenticeship • work with other personnel, where used, in the preparation and delivery of assessment methods • conduct the EPA to assess the apprentice against the KSBs and in line with the EPA plan • make final grading decisions in line with this EPA plan • record and report assessment outcome decisions • comply with the IQA requirements of the EPAO • comply with external quality assurance (EQA) requirements
Training provider	<p>As a minimum, the training provider must:</p> <ul style="list-style-type: none"> • conform to the requirements of the apprenticeship provider and assessment register • ensure procedures are in place to mitigate against any conflict of interest

ROLES	RESPONSIBILITIES
	<ul style="list-style-type: none"> • work with the employer and support the apprentice during the off-the-job training to provide the opportunities to develop the KSBs as outlined in the occupational standard • deliver training to the apprentice as outlined in their apprenticeship agreement • monitor the apprentice’s progress during any training provider led on-programme learning • ensure the apprentice is prepared for the EPA • work with the employer to select the EPAO • advise the employer, upon request, on the apprentice’s readiness for EPA • ensure that all supporting evidence required at the gateway is submitted in line with this EPA plan • remain independent from the delivery of the EPA

Reasonable adjustments

[Edit reasonable adjustments form](#)

The EPAO must have reasonable adjustments arrangements for the EPA.

This should include:

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

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

Special considerations

The EPAO must have special consideration arrangements for the EPA.

This should include:

- how an apprentice qualifies for a special consideration
- what special considerations will be given

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

Internal quality assurance

[Edit internal quality assurance form](#)

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

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

They must also appoint independent assessors who:

- have recent relevant experience of the occupation or sector to at least occupational level 3 gained in the last 5 years or significant experience of the occupation or sector

Value for money

Edit value for money form

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

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

Professional recognition

Edit professional recognition form

This apprenticeship is not aligned to professional recognition.

Mapping of KSBs to assessment methods

Edit mapping of ksbs to assessment methods form

KNOWLEDGE	ASSESSMENT METHODS
K1 The furniture industry function and role of the operative. Responsibilities, limits of role and escalation procedures.	Interview underpinned by a portfolio of evidence
K2 Job specifications, technical drawings and technical information.	Observation with questions
K3 Planning for wood machining activity, work organisation, resources, materials and time management.	Observation with questions
K4 Safe systems of work including risk assessments.	Observation with questions
K5 Awareness of health and safety regulations, standards, and guidance and impact on role. Control of Substances Hazardous to Health (COSHH). Fire safety. Health and Safety at Work Act. Isolation and emergency stop procedures. Manual handling. Personal Protective Equipment (PPE). Safety equipment: guards, signage, fire extinguishers. Safety signage. Situational awareness. Slips, trips, and falls. Provision and Use of Work Equipment Regulations (PUWER) and Reporting of Injuries, Diseases and Dangerous Occurrences Regulations (RIDDOR).	Observation with questions

KNOWLEDGE	ASSESSMENT METHODS
<p>K6 Environment and sustainability regulation, standards and guidance relevant to the occupation and the operative's responsibilities. Efficient use of resources. Recycling, reuse and safe disposal of waste.</p>	<p>Interview underpinned by a portfolio of evidence</p>
<p>K7 Preparation and maintenance of the work area.</p>	<p>Observation with questions</p>
<p>K8 Workplace operating procedures. What they are and why they are important.</p>	<p>Observation with questions</p>
<p>K9 Tools and equipment used in wood machining.</p>	<p>Observation with questions</p>
<p>K10 Storage environment for tools and equipment.</p>	<p>Interview underpinned by a portfolio of evidence</p>
<p>K11 Maintenance of tools and equipment including pre-checks, inspections and tool condition.</p>	<p>Interview underpinned by a portfolio of evidence</p>
<p>K12 Machinery used in wood machining.</p>	<p>Observation with questions</p>
<p>K13 Maintenance of machinery for wood machining activity such as, cleaning and lubrication, tool calibration checks, sharpening and servicing of tools.</p>	<p>Interview underpinned by a portfolio of evidence</p>
<p>K14 Setting up wood machining machinery and tooling to perform wood machining operations.</p>	<p>Observation with questions</p>
<p>K15 Types of materials used in wood machining.</p>	<p>Observation with questions</p>
<p>K16 Jigs and templates. Purpose, condition and use.</p>	<p>Observation with questions</p>
<p>K17 Methods of measuring and marking out of materials.</p>	<p>Observation with questions</p>

KNOWLEDGE	ASSESSMENT METHODS
<p>K18 Wood machining processes: cutting, shaping, planing, turning, profiling, boring, edge banding, jointing wood and wood-based products.</p>	<p>Observation with questions</p>
<p>K19 Wood preparation techniques: inspection, stripping, process of sanding and grit sizes.</p>	<p>Observation with questions</p>
<p>K20 Furniture components and sub-assemblies.</p>	<p>Observation with questions</p>
<p>K21 Rectification, repair and rework techniques used in wood machining.</p>	<p>Interview underpinned by a portfolio of evidence</p>
<p>K22 Methods of packing, storing and handling of furniture components and sub-assemblies.</p>	<p>Interview underpinned by a portfolio of evidence</p>
<p>K23 Quality assurance processes.</p>	<p>Interview underpinned by a portfolio of evidence</p>
<p>K24 Methods of documenting work in progress for the wood machining activity.</p>	<p>Interview underpinned by a portfolio of evidence</p>
<p>K25 Continuous improvement techniques: lean manufacturing, six sigma, 5S, and KAIZEN.</p>	<p>Interview underpinned by a portfolio of evidence</p>
<p>K26 Team working principles.</p>	<p>Interview underpinned by a portfolio of evidence</p>
<p>K27 Principles of equity, diversity, and inclusion in the workplace and the impact on their work.</p>	<p>Interview underpinned by a portfolio of evidence</p>
<p>K28 Verbal communication techniques. Giving and receiving information.</p>	<p>Interview underpinned by a portfolio of evidence</p>
<p>K29 Written communication techniques - electronic and paper. Industry terminology.</p>	<p>Interview underpinned by a portfolio of evidence</p>

KNOWLEDGE	ASSESSMENT METHODS
<p>K30 Information and digital technology: email, collaboration packages, databases, equipment digital interfaces, management information systems, word processing, work sharing platforms, GDPR, cyber security.</p>	<p>Interview underpinned by a portfolio of evidence</p>
SKILL	ASSESSMENT METHODS
<p>S1 Read and interpret job specifications, technical drawings or information for wood machining activity.</p>	<p>Observation with questions</p>
<p>S2 Plan wood machining activity including timescales for completion, and organise materials and resources.</p>	<p>Observation with questions</p>
<p>S3 Prepare and maintain the work area.</p>	<p>Observation with questions</p>
<p>S4 Apply safe systems of working including risk assessment.</p>	<p>Observation with questions</p>
<p>S5 Follow health and safety regulations, standards, and guidance.</p>	<p>Observation with questions</p>
<p>S6 Follow procedures in line with environmental and sustainability regulations, standards, and guidance. Segregate resources for reuse, recycling and disposal.</p>	<p>Interview underpinned by a portfolio of evidence</p>
<p>S7 Follow workplace operating procedures.</p>	<p>Observation with questions</p>
<p>S8 Store tools and equipment.</p>	<p>Interview underpinned by a portfolio of evidence</p>
<p>S9 Select tools, equipment, and machinery for wood machining activity.</p>	<p>Observation with questions</p>
<p>S10 Apply first line maintenance of tools, equipment and machinery. For example, checking tool condition, cleaning, lubrication, visual inspection, tool calibration checks, sharpening and servicing of tools.</p>	<p>Interview underpinned by a portfolio of evidence</p>
<p>S11</p>	<p>Observation with questions</p>

KNOWLEDGE	ASSESSMENT METHODS
Identify and select materials used in wood machining.	
S12 Measure and mark out materials.	Observation with questions
S13 Prepare and use jigs and templates used in the work activity. Check jigs and templates for damage.	Observation with questions
S14 Set up and operate wood machining machinery.	Observation with questions
S15 Apply wood machining processes using conventional or CNC machinery. For example, cutting, shaping, planing, turning, profiling, boring, or edge banding for production of jointed wood and wood-based products.	Observation with questions
S16 Assemble components or sub-assemblies of furniture.	Observation with questions
S17 Inspect, strip, and sand material surfaces.	Observation with questions
S18 Carry out rectification, repair and rework of machined components.	Interview underpinned by a portfolio of evidence
S19 Follow quality assurance processes.	Interview underpinned by a portfolio of evidence
S20 Pack, store and handle components and sub-assemblies.	Interview underpinned by a portfolio of evidence
S21 Record wood machining activity information - paper based or electronic.	Interview underpinned by a portfolio of evidence
S22 Apply basic continuous improvement techniques. For example, lean manufacturing, six sigma, 5S, and KAIZEN.	Interview underpinned by a portfolio of evidence
S23 Apply team working principles.	Interview underpinned by a portfolio of evidence

KNOWLEDGE	ASSESSMENT METHODS
S24 Apply escalation procedures in relation to faults or issues.	Interview underpinned by a portfolio of evidence
S25 Follow equity, diversity and inclusion rules.	Interview underpinned by a portfolio of evidence
S26 Communicate verbally with colleagues and supervisors.	Interview underpinned by a portfolio of evidence
S27 Communicate in writing with colleagues and supervisors using industry terminology electronically or paper based.	Interview underpinned by a portfolio of evidence
S28 Use information technology and digital systems. Comply with GDPR and cyber security regulations and policies.	Interview underpinned by a portfolio of evidence
S29 Undertake and record learning and development activities.	Interview underpinned by a portfolio of evidence
BEHAVIOUR	ASSESSMENT METHODS
B1 Put health and safety first.	Observation with questions
B2 Take ownership of given work.	Observation with questions
B3 Consider the impact on the environment when using resources and carrying out work.	Interview underpinned by a portfolio of evidence
B4 Team-focus to meet work goals.	Interview underpinned by a portfolio of evidence
B5 Support an inclusive workplace for example, respectful of different views.	Interview underpinned by a portfolio of evidence
B6 Seek learning and development opportunities.	Interview underpinned by a portfolio of evidence

Mapping of KSBs to grade themes

[Edit add grade themes form](#)[Edit mapping of ksbs to grade themes form](#)

Observation with questions

KSBS GROUPED BY THEME	KNOWLEDGE	SKILLS	BEHAVIOUR
<p>Health, safety and workplace procedures K4 K5 K7 K8 S3 S4 S5 S7 B1</p>	<p>Safe systems of work including risk assessments. (K4)</p> <p>Awareness of health and safety regulations, standards, and guidance and impact on role. Control of Substances Hazardous to Health (COSHH). Fire safety. Health and Safety at Work Act. Isolation and emergency stop procedures. Manual handling. Personal Protective Equipment (PPE). Safety equipment: guards, signage, fire extinguishers. Safety signage. Situational awareness. Slips, trips, and falls. Provision and Use of Work Equipment Regulations (PUWER) and Reporting of Injuries, Diseases and Dangerous Occurrences Regulations (RIDDOR). (K5)</p> <p>Preparation and maintenance of the work area. (K7)</p> <p>Workplace operating procedures. What they are and why they are important. (K8)</p>	<p>Prepare and maintain the work area. (S3)</p> <p>Apply safe systems of working including risk assessment. (S4)</p> <p>Follow health and safety regulations, standards, and guidance. (S5)</p> <p>Follow workplace operating procedures. (S7)</p>	<p>Put health and safety first. (B1)</p>
<p>Work organisation and preparation K2 K3 S1 S2 B2</p>	<p>Job specifications, technical drawings and technical information. (K2)</p> <p>Planning for wood machining activity, work organisation, resources, materials and time management. (K3)</p>	<p>Read and interpret job specifications, technical drawings or information for wood machining activity. (S1)</p> <p>Plan wood machining activity including timescales for completion, and organise materials and resources. (S2)</p>	<p>Take ownership of given work. (B2)</p>

KSBS GROUPED BY THEME	KNOWLEDGE	SKILLS	BEHAVIOUR
<p>Machinery, tools, jigs and templates and equipment K9 K12 K14 S9 S14</p>	<p>Tools and equipment used in wood machining. (K9)</p> <p>Machinery used in wood machining. (K12)</p> <p>Setting up wood machining machinery and tooling to perform wood machining operations. (K14)</p>	<p>Select tools, equipment, and machinery for wood machining activity. (S9)</p> <p>Set up and operate wood machining machinery. (S14)</p>	<p>None</p>
<p>Manufacturing and machining of furniture components and assemblies K15 K16 K17 K18 K19 K20 S11 S12 S13 S15 S16 S17</p>	<p>Types of materials used in wood machining. (K15)</p> <p>Jigs and templates. Purpose, condition and use. (K16)</p> <p>Methods of measuring and marking out of materials. (K17)</p> <p>Wood machining processes: cutting, shaping, planing, turning, profiling, boring, edge banding, jointing wood and wood-based products. (K18)</p> <p>Wood preparation techniques: inspection, stripping, process of sanding and grit sizes. (K19)</p> <p>Furniture components and sub-assemblies. (K20)</p>	<p>Identify and select materials used in wood machining. (S11)</p> <p>Measure and mark out materials. (S12)</p> <p>Prepare and use jigs and templates used in the work activity. Check jigs and templates for damage. (S13)</p> <p>Apply wood machining processes using conventional or CNC machinery. For example, cutting, shaping, planing, turning, profiling, boring, or edge banding for production of jointed wood and wood-based products. (S15)</p> <p>Assemble components or sub-assemblies of furniture. (S16)</p> <p>Inspect, strip, and sand material surfaces. (S17)</p>	<p>None</p>

Interview underpinned by a portfolio of evidence

KSBS GROUPED BY THEME	KNOWLEDGE	SKILLS	BEHAVIOUR
Environmental and sustainability K6 S6 B3	Environment and sustainability regulation, standards and guidance relevant to the occupation and the operative's responsibilities. Efficient use of resources. Recycling, reuse and safe disposal of waste. (K6)	Follow procedures in line with environmental and sustainability regulations, standards, and guidance. Segregate resources for reuse, recycling and disposal. (S6)	Consider the impact on the environment when using resources and carrying out work. (B3)
Maintenance of machinery, tools and equipment K11 K13 S10	Maintenance of tools and equipment including pre-checks, inspections and tool condition. (K11) Maintenance of machinery for wood machining activity such as, cleaning and lubrication, tool calibration checks, sharpening and servicing of tools. (K13)	Apply first line maintenance of tools, equipment and machinery. For example, checking tool condition, cleaning, lubrication, visual inspection, tool calibration checks, sharpening and servicing of tools. (S10)	None
Storage of tools, equipment, materials, products and components K10 K22 S8 S20	Storage environment for tools and equipment. (K10) Methods of packing, storing and handling of furniture components and sub-assemblies. (K22)	Store tools and equipment. (S8) Pack, store and handle components and sub-assemblies. (S20)	None
Rectification, repair, and rework K21 S18	Rectification, repair and rework techniques used in wood machining. (K21)	Carry out rectification, repair and rework of machined components. (S18)	None
Team working, communications, and inclusion K1 K26 K27 K28 K29 S23 S24 S25 S26 S27 B4 B5	The furniture industry function and role of the operative. Responsibilities, limits of role and escalation procedures. (K1) Team working principles. (K26) Principles of equity, diversity, and inclusion in the workplace and the	Apply team working principles. (S23) Apply escalation procedures in relation to faults or issues. (S24) Follow equity, diversity and inclusion rules. (S25)	Team-focus to meet work goals. (B4) Support an inclusive workplace for example, respectful of different views. (B5)

KSBS GROUPED BY THEME	KNOWLEDGE	SKILLS	BEHAVIOUR
	<p>impact on their work. (K27)</p> <p>Verbal communication techniques. Giving and receiving information. (K28)</p> <p>Written communication techniques - electronic and paper. Industry terminology. (K29)</p>	<p>Communicate verbally with colleagues and supervisors. (S26)</p> <p>Communicate in writing with colleagues and supervisors using industry terminology electronically or paper based. (S27)</p>	
<p>Continuous improvement K25 S22</p>	<p>Continuous improvement techniques: lean manufacturing, six sigma, 5S, and KAIZEN. (K25)</p>	<p>Apply basic continuous improvement techniques. For example, lean manufacturing, six sigma, 5S, and KAIZEN. (S22)</p>	<p>None</p>
<p>Quality assurance processes K23 S19</p>	<p>Quality assurance processes. (K23)</p>	<p>Follow quality assurance processes. (S19)</p>	<p>None</p>
<p>Documentation and use of digital, and information technology K24 K30 S21 S28</p>	<p>Methods of documenting work in progress for the wood machining activity. (K24)</p> <p>Information and digital technology: email, collaboration packages, databases, equipment digital interfaces, management information systems, word processing, work sharing platforms, GDPR, cyber security. (K30)</p>	<p>Record wood machining activity information - paper based or electronic. (S21)</p> <p>Use information technology and digital systems. Comply with GDPR and cyber security regulations and policies. (S28)</p>	<p>None</p>
<p>Learning and development opportunities S29 B6</p>	<p>None</p>	<p>Undertake and record learning and development activities. (S29)</p>	<p>Seek learning and development opportunities. (B6)</p>

Supporting information

External quality assurance

[Edit external quality assurance - eqa form](#)

Option selected: Ofqual

Involved employers

Benbow Group, BSW Group, BSW Timber, CTS Joinery, Ercol, JT Ward Joinery, Rolls-Royce Motor Cars, SB Joinery, Stairways Group, Tekne, Tetrad

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EPA menu