

# Building your Portfolio of Evidence and Reflective Statement



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## INTRODUCTION

The Portfolio of Evidence and Reflective Statement is one of two assessment components that make up your End-Point Assessment for the Level 4 Professional Taxation Technician apprenticeship. The second requirement involves undertaking a Role Simulation assessment. You will need to pass **both** components. There is separate guidance to help you prepare for the Role Simulation.

This guidance will help you build the Portfolio of Evidence needed for your End-Point Assessment. It will help you work out what to put in your Portfolio and how to organise the evidence. The guidance will also help you organise your Training Log, which you may wish to add to your evidence, and outline what is required for your Reflective Statement, which must be included with your Portfolio in your submission.

### Who does what in building the Portfolio of Evidence and Reflective Statement?

<p><b>ATT</b> provides clear guidance to let you know what is required ATT will have two independent assessors assess your Portfolio of Evidence to determine competence.</p>	<p><b>Your employer</b> creates opportunities that allow you to generate evidence that demonstrates your competence. Your employer will also review your progress and decide when you are ready for End-Point Assessment.</p>
<p><b>Your training provider</b> will carry out regular progress reviews with you, if your employer chooses to delegate this role. Your training provider will review the quality and sufficiency of the evidence you are generating.</p>	<p><b>You</b> must generate and select the evidence for your Portfolio of Evidence. Prepare your Portfolio of Evidence and Reflective Statement.</p>

### WHAT IS A PORTFOLIO OF EVIDENCE?

A Portfolio of Evidence is a repository for the work that best demonstrates the knowledge and skills, and demonstrate the behaviours identified in the Apprenticeship Standard. **There are five categories of knowledge, seven skills and five behaviours, and you must demonstrate each one of these to pass this element of the End-Point Assessment.** So your submission contains the proof that you have attained, and can apply, all of the knowledge, skills and behaviours. These are listed in the Appendix to this document.

The Portfolio and Reflective Statement are submitted together online as a single pdf document.

### WHAT SHOULD I PUT IN MY PORTFOLIO OF EVIDENCE?

#### Your best work

The apprenticeship allows you to have the space and time needed to learn and develop your skills. You do not need to start putting evidence together straight away. When you are ready and can start to apply what has been learned in the workplace, then you will be ready to start building your Portfolio of Evidence.

Your best work will demonstrate your attainment of the knowledge, skills and behaviours identified in the Apprenticeship Standard, show you applying your learning and skills, and will show that you have completed substantial real work tasks. Any client information will need to be suitably anonymised or

pseudonymised if specific client details are involved. No client names should be included in your submission, otherwise the ethical and compliance aspects of the Standard will not have been met.

Types of **primary evidence** to consider using to demonstrate your abilities include:

#### [Work-based products or services](#)

These might include an extract from a letter or calculation you have prepared. This may be your own contribution to wider team work.

#### [Presentations you make](#)

This is the type of opportunity you should seek at work as a learning experience.

Types of **secondary evidence** to consider using to demonstrate your abilities include:

#### [Witness testimony from your manager](#)

Witness testimony is a useful way to authenticate work as your own and to provide evidence that is difficult to capture in a physical form. For example, some performance of tasks at a client's place of work.

Witness testimony acts as a way of supporting something you have done but cannot evidence; evidence for something important, but not central to your Portfolio; or a supplement to other evidence of the same knowledge, skills and behaviours.

#### [Client testimony](#)

Client testimony serves a similar purpose to witness testimony from your employer or training provider because it is independent. It can be used to support your performance in delivering a better client service or your behaviour, knowledge and ability when supporting clients.

#### [How do I know my evidence is suitable?](#)

Be conscious of the following principles of assessment when you build your Portfolio of Evidence, in order to make sure it adequately demonstrates the knowledge, skills and behaviours.

1. **Valid evidence:** The evidence presented should be an appropriate way of demonstrating the abilities you want to show. So, if you want to demonstrate that you can apply tax knowledge to consistently deliver high quality, accurate data and information in a timely fashion, the evidence presented should be of you doing this.
2. **Authentic evidence:** The evidence must be your own work. When you provide a personal statement as evidence of an achievement, you will need to have your manager sign it as an accurate rejection of events. Where workplace evidence is used in your Portfolio of Evidence, this must be your own work.
3. **Current evidence:** The evidence should be recent enough to be considered to be a current indication of your knowledge, skills and behaviours.
4. **Sufficient evidence:** You need to have enough of the right kind of evidence in your Portfolio of Evidence. This starts with making sure everything produced is at a Level 4 standard.

#### [How much evidence should I include?](#)

Include several contrasting pieces of evidence. ATT expects an absolute minimum of two contrasting pieces of evidence of sufficient quality. At least one piece of evidence should be, or refer to, client work.

## REFLECTIVE STATEMENT

Your submission as a whole, the Portfolio together with Reflective Statement, must

1. Indicate your competence in every knowledge, skill and behaviour required by the Apprenticeship Standard. Show which area(s) you are referring to, making sure all are covered. Reference your work evidence and relevant exam passes. For each area, an example is needed to demonstrate your understanding and competence. But you may be able to use one example to cover more than one area.
2. Include your reflections on your learning journey. The Reflective Statement allows you to look back on what you have learned and done, and to share your thoughts on it. It will involve honesty, critical analysis of your performance and a chance to demonstrate integrity (one of the behaviours identified in the apprenticeship standard) in how you approach this work. Your thoughts on your training log could be included. You should demonstrate that you have applied what you have learned as well as considering improvement points and further goals for the near future.

### What is a Reflective Statement designed to do?

It is designed to show you can honestly appraise your performance and look at the impact the whole experience has had on you. The concept at the heart of this is 'efficacy'. Showing your progress and motivation will contribute to fulfilling the 'leadership' aspect of the Apprenticeship Standard.

### What does a Reflective Statement look like?

It will be a written statement that will be made up of your own reflections on what you have done, how you did it, what you would have done differently and what you have learned throughout the Portfolio building process. This will be part of one document together with your Portfolio evidence. It is up to you how you organise and order the elements of your submission, but where you refer in your own writing to evidence you have included, consider how to make this easy for the reader to find.

### How long should my submission be?

Your own writing in the submission is likely to be around 1,000 to 3,000 words. As a guide, a concisely-written Portfolio and Reflective Statement, including an introduction, several appropriate pieces of workplace evidence, reference to all requirements of the Apprenticeship Standard and pertinent reflections, is likely to be between 15 and 30 pages long.

### Referencing to the Apprenticeship Standard

The independent assessors grading your work will be looking to see that you have met every knowledge, skill and behaviour listed in the Standard. **Use clear headings or pdf notes** showing how you believe each one has been met. Reference to requirements rather than necessarily the detail of any learning outcomes.

### Quality of communication

Write clearly. One of the Gateway requirements for the End Point Assessment is a minimum level (Level 2) of written English. Your written submission should demonstrate at least this level.

Head your submission with your name and Portfolio reference number. You may consider adding a short introduction summarising your work role, to give context to the evidence and reflections.

If you are scanning documents, make sure the quality is clear enough to be read without difficulty.

Be concise. If your draft submission is more than 35 pages long, look at how you could condense this. If including examples of work, use 1-2 representative pages if the original document is longer than this. If you have given multiple examples for one or more area of the Apprenticeship Standard, limit yourself to the best examples.

## REFLECTIVE STATEMENT: GETTING STARTED

The following questions and tips will help get you started: What was your starting point at the beginning of the apprenticeship? What learning took place in the workplace? Were there any opportunities to work in other areas of the business?

Pick the best examples from your Portfolio and share:

- What they are and how you did them
- What they demonstrate in relation to the apprenticeship standard
- What went well, what challenged you and how did you meet the challenge?
- What would you do differently next time (what lessons were learned)?
- What did you learn? What have you discovered about yourself as a learner?
- What are your plans now for continued learning?

You do not need this level of detail for every single aspect of the Apprenticeship Standard separately. But an overview of your progress and your motivation for further professional development will contribute to

fulfilling the 'leadership' requirement (S3 in the Appendix), which the Apprenticeship Standard recognises is less likely to be demonstrated by management others in your workplace at this stage of your career.

**Here's a checklist for your Portfolio and Reflective Statement. Make sure:**

- It contains sufficient, contrasting, pieces of evidence
- It is written in as concise a way as possible and that it is clear legible for the reader, with headings and references to make it easy to navigate
- It is filled with factual knowledge, as well as your personal opinion
- It contains insights into your learning
- It reveals the decision-making process you used in the most difficult situations
- Client names are redacted to protect confidentiality. ATT will assume that any individuals within your firm or tutorial body named or quoted have given permission for this. But no client names should appear.

## PROGRESS THROUGH YOUR ON-PROGRAMME ASSESSMENT

You will have regular progress reviews with your employer and/or your approved training provider. The purpose of the reviews is to discuss your progress and how well you are doing during the on-programme stage of the apprenticeship. Your training log will be a useful focus for the reviews and you should keep it up to date and containing sufficient detail to help you have meaningful discussions during your progress review. The progress reviews will:

1. Check on the extent to which you are covering the necessary knowledge, skills and behaviours shown in the apprenticeship standard.
2. Check on the level of your understanding and application of the knowledge, skills and behaviours to make sure you are performing at the right level and progressing towards the End-Point Assessment.

### How do the ATT examinations fit in during the on-programme assessment?

The ATT's examinations are the best way to demonstrate your attainment of the tax-technical knowledge part of the apprenticeship standard. A pass in the Ethics Computer Based Examination would demonstrate that the ethical knowledge requirement has been met. Remember to refer within your Portfolio to your exam passes and also show evidence of the remaining areas of knowledge in the Standard. There are five of these, three of which examination passes will not cover: these are Business Awareness, regulation and Compliance, and Systems and Processes.

### How is my Portfolio and Reflective Statement assessed?

Your submission will be graded by two of ATT's trained Independent Assessors. They check that you have provided sufficient evidence and that you have demonstrated competence in every element of the Apprenticeship Standard (as listed in the Appendix). The result is a pass or fail only.

### If my Portfolio and Reflective Statement does not receive a pass grading, can I resubmit it?

Yes. Independent Assessors record which competences were not demonstrated. Any submission which does not pass may be revised, making use of feedback from ATT, and resubmitted at the next sitting.

### Final points

When you record and reflect on your learning and performance, do not wait until the end and then wonder what to do or to write. Start the process early and build a record of your thoughts to look back on. One way to do this could be by creating a reflective journal or diary that you update periodically. If you do not want to keep a diary, think about adding this reflective dimension to your training log.

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# APPENDIX

HEADINGS AND REQUIREMENTS REPRODUCED FROM STANDARD ST0003 as approved 21 July 2016, using ATT's own referencing

## KNOWLEDGE

These are listed below, with extracts from requirements.

### **K1 Technical knowledge**

...knowledge and understanding of the core elements of personal and business taxation principles...

### **K2 Business awareness**

...understand the industries and environments in which an organisation operates...

### **K3 Ethical standards**

...will understand and apply the relevant Ethical Standards...

### **K4 Regulation and compliance**

...understand and apply professional standards and legal regulations...

### **K5 Systems and processes**

...understanding of... systems and processes such as tax systems, internal control systems and IT systems...

## SKILLS

These are listed below, with requirements.

### **S1 Analysis**

Create and interpret information, and show how that information can be used most effectively to add value to the organisation

### **S2 Communication**

Effectively communicate relevant information across the organisation and to appropriate stakeholders in both written and verbal formats

### **S3 Leadership**

Proactively manage their own development and is committed to the job and their profession

### **S4 Planning and prioritisation**

Work to tight deadlines and respond to changing priorities. Effectively plan and prioritise time co-ordinate the input of others in order to meet both deadlines and changing priorities

### **S5 Produces quality and accurate information**

Apply accounting/tax knowledge to consistently deliver high quality, accurate data and information in a timely fashion

### **S6 Team working and collaboration**

Work effectively in a team with others, maintaining effective, professional working relationships both internally and externally across organisations

### **S7 Uses systems and processes**

Understand the systems and processes of the organisation sufficiently, and applicable to the role. Proficient in the IT system applicable to the role

## BEHAVIOURS

These are listed below, with requirements.

### **B1 Adaptability**

Willing to both listen and learn and to accept changing priorities and working requirements and has the flexibility to maintain high standards in a changing environment

### **B2 Adding value**

Actively engage in the wider business, as appropriate, and look to provide information that positively contributes to influencing business decisions. Continually strives to improve own working processes and those in the organisation

### **B3 Ethics and integrity**

Honest and principled in all of their actions and interactions. They will respect others and meet the ethical requirements of their profession

### **B4 Proactivity**

Takes responsibility. Demonstrates the drive and energy to get things done, even under pressure

### **B5 Professional scepticism**

Demonstrate an attitude that includes a questioning mind, being alert to conditions which may indicate possible misstatement of financial information due to error or fraud

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