

# Building your Portfolio of Evidence and Reflective Statement



[www.att.org.uk](http://www.att.org.uk)

@ourATT on



---

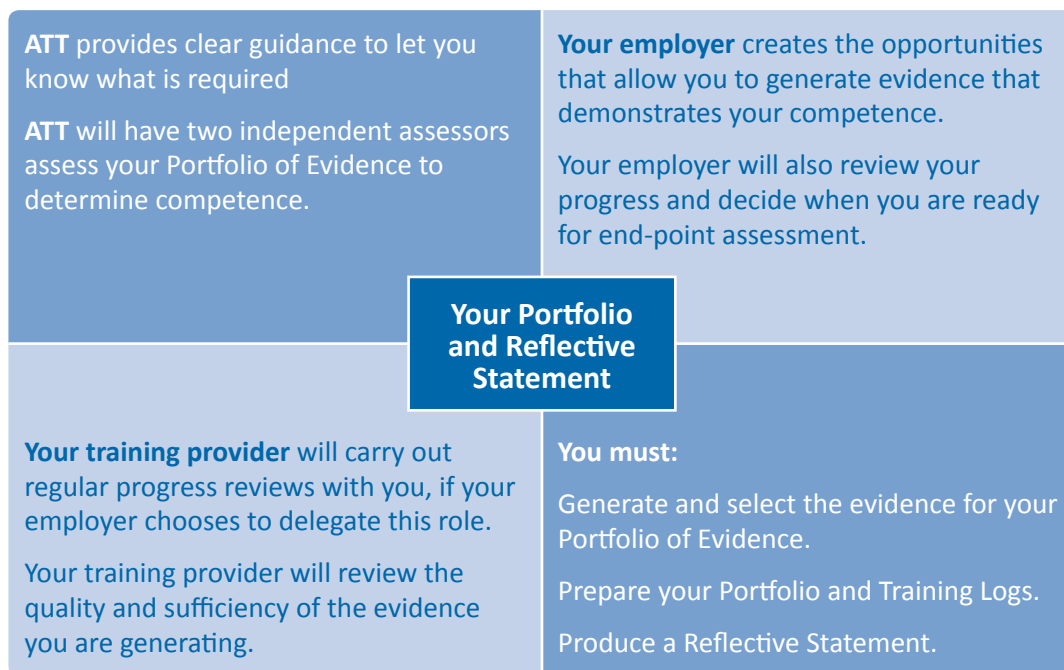
# BUILDING YOUR PORTFOLIO AND REFLECTIVE STATEMENT

## INTRODUCTION

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, and outline what is required for your Reflective Statement, which must be included with your Portfolio.

The Portfolio is one of two requirements needed for the end-point assessment. The second requirement involves undertaking a Role Simulation assessment. There is a separate guidance resource to help you prepare for this called 'Getting Ready for the Role Simulation'.

### Who does what in building the Portfolio of Evidence



## WHAT IS A PORTFOLIO OF EVIDENCE?

A Portfolio of Evidence is a repository for the work that best demonstrates that you can apply the knowledge and skills, and demonstrate the behaviours identified in the apprenticeship standard. So, the Portfolio of Evidence contains the proof that you have attained, and can apply, the knowledge, skills and behaviours defined in the apprenticeship standard.

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

The portfolio is made up of two types of evidence:

- Your best work
- Your account of your learning and skills development journey

### 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
- Contain substantial real work tasks that you have completed. These will need to be suitably anonymised if specific client details are involved.

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

- Work-based products or services
- Presentations you make
- Your contributions to wider team work

### Types of **secondary evidence** to consider using to demonstrate your abilities

EVIDENCE	WHAT IT DEMONSTRATES WELL
Witness Testimony from your manager/supervisor or on-programme training provider	<p>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.</p> <p>Witness testimony acts as:</p> <ul style="list-style-type: none"><li>● A way of supporting something you have done but cannot evidence</li><li>● Evidence for something important, but not central to your portfolio</li><li>● A supplement to other evidence of the same knowledge, skills and behaviours, i.e. here is the evidence and here is a witness testimony saying that I also did the same thing at another time</li></ul>
Client testimony	<p>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.</p>

---

# BUILDING YOUR PORTFOLIO AND REFLECTIVE STATEMENT CONTINUED

You must 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/supervisor sign it as an accurate reflection 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.

Level 4 standards involve identifying, adapting and using skills to inform your actions and address problems that are well-defined, but are complex and potentially non-routine.

You will also reflect on the effectiveness and appropriateness of methods used, actions taken and results achieved.

## EVIDENCE OF YOUR LEARNING AND SKILLS DEVELOPMENT JOURNEY

Your Portfolio of Evidence must include more than just indicators of achievement or demonstrations of competence. It should also capture evidence of the learning and skills development journey you have been on, as well as your reflections on your learning journey. This aspect of the portfolio is delivered through your:

- Training Log
- Reflective Statement

## TRAINING LOG

### What is a Training Log?

It is a record of your work and the evidence you are generating. It also indicates which parts of the apprenticeship standard you have learned and applied in your workplace. So, it records how you are developing your knowledge and skills, and builds up over time as you learn and develop more and more skills and competencies.

### What is it designed to do?

The Training Log will show whether you are developing the knowledge, skills and behaviours required to meet the Professional Taxation Technician Standard, as planned. Your Training Log will chart your progress while you are doing the on-programme part of the apprenticeship.

Use it to identify and record examples of your work that demonstrate that you have applied what you have learned. You can use your Training Log as the basis for your progress review discussions.

---

## REFLECTIVE STATEMENT

### What is a Reflective Statement?

The Reflective Statement is a piece of evidence allowing 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.

### What is it 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'.

Synonyms for *efficacy*: *Effectiveness; usefulness; worth; value; impact*

## WHAT DOES A REFLECTIVE STATEMENT LOOK LIKE?

This 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.

It needs to be around 2,000 to 3,000 words.

Synonyms for *reflection*: *Consideration, thinking, contemplation, deliberation, musings*

At the centre of the Reflective Statement has to be a process of critical analysis with you thinking about, and sharing your thoughts on, your work and your learning.

## 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 3-6 of 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 would you do differently next time (what lessons were learned)?
  - What did you learn that surprised you?
- Remember the need for confidentiality of information, data and client privacy. You need to make sure any evidence collected and anything you have referenced in your Reflective Statement has been suitably anonymised.

Then you could move on to:

- What challenged you?
- How did you meet the challenge?
- What would you do differently if you have a chance to do this project again? Why?
- What have you discovered about yourself as a learner?

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

- It is written in as a clear and concise a way as possible and that it is understandable to the reader
- It is filled with factual knowledge, as well as your personal opinion
- It lacks bias
- It contains insights into your learning
- It reveals the decision-making process you used in the most difficult situations.

---

# BUILDING YOUR PORTFOLIO AND REFLECTIVE STATEMENT CONTINUED

**The focus of the assessment is not how many faults you find; it is how well you are able to honestly appraise your work. Have you the maturity to look at your work honestly and say how you could make it even better?**

A common mistake would be to either be too objective, or to be too emotional. Whilst you will need to analyse your personal feelings, to be a good statement there needs to be a balance struck to ensure it is personal to each individual and reflects on all the training undertaken.

Please contact the ATT to discuss alternative arrangements if there are special considerations that mean a written Reflective Statement might not be appropriate.

## WHAT MAKES A GOOD REFLECTIVE STATEMENT?

A good reflective statement will have:

### 1. Analysis

This will involve recalling important learning events during the apprenticeship and considering how these events shaped where you are now and how they were beneficial. Analysis-type questions to ask yourself:

- What were the key factors that shaped this experience?
- How has this experience changed you as an individual?
- What factors could have changed the outcome of this experience?

### 2. Insight and informed opinion

Insight-type questions to ask include:

- What did you learn from key learning experiences?
- How have you grown because of these experiences?
- In what way were these types of experiences 'game-changers'?
- Is there anything you might do differently next time?
- What were the lessons learned?

### 3. A next steps dimension

This will involve analysis of your acquired competences (as a result of your apprenticeship) and the strengths you have, and then building some aims for the future. These could be targeted aims looking at the areas you think you need to work on, together with longer term aims looking at your career

The most important factor when using this approach is choosing goals that follow the SMART model (Specific, Measurable, Attainable, Realistic and Time-focused). Next-steps type questions to ask yourself include:

- What were your goals?
- What did you do to achieve these goals?
- Where is this taking you in terms of your continued professional development?

## REGULAR PROGRESS REVIEWS DURING THE ON-PROGRAMME ASSESSMENT

You will have a regular progress review with your employer and/or your approved training provider (every three months). 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 review will do two things:

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.

---

If you think of the on-programme journey as the time you spend studying for the ATT examinations, together with consolidating and securing the appropriate knowledge, skills and behaviours and applying them in the workplace, then the progress reviews check how you are doing.

When you have secured the knowledge, skills and behaviours in the apprenticeship standard, demonstrating this through the work you are producing (as shown in your training log) and as agreed in your regular progress reviews, then you will be ready for 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 knowledge part of the apprenticeship standard.

The ATT has a modular structure; three written papers must be passed, plus two Computer Based Examinations (CBEs). There are two compulsory written papers, being Personal Taxation (Paper 1) and Business Taxation & Accounting Principles (Paper 2). You then have a choice of one of the four option papers for the final written paper. Each paper is 3 hours in length, with 15 minutes of reading time at the start.

The two compulsory CBEs are Law and Professional Responsibilities & Ethics.

It is also possible to follow the Tax Pathway, for more details on the choice of papers available, please go to <https://hub.tax.org.uk/pathway>

Completing the ATT examinations as part of a successful apprenticeship will set you up well for membership of the ATT. Please note exam requirements do change from time to time, please check with your training provider or the ATT website before starting.

To be eligible for membership of the Association of Taxation Technicians, you must have achieved the following:

- Passes in the written paper examinations and the two CBEs.
- At least two years' practical experience in UK taxation.
- Be a fit and suitable person.

For more details about the ATT qualification, you can go to: <https://www.att.org.uk/prospectus-syllabus>

### **Last thoughts**

If you are going to 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 (a diary) that you update periodically. Put in the reflective journal the following types of things:

- Your thoughts on the work going into your training log
- Your own appraisal after each performance review
- What you are finding challenging and why

The basic structure could be:

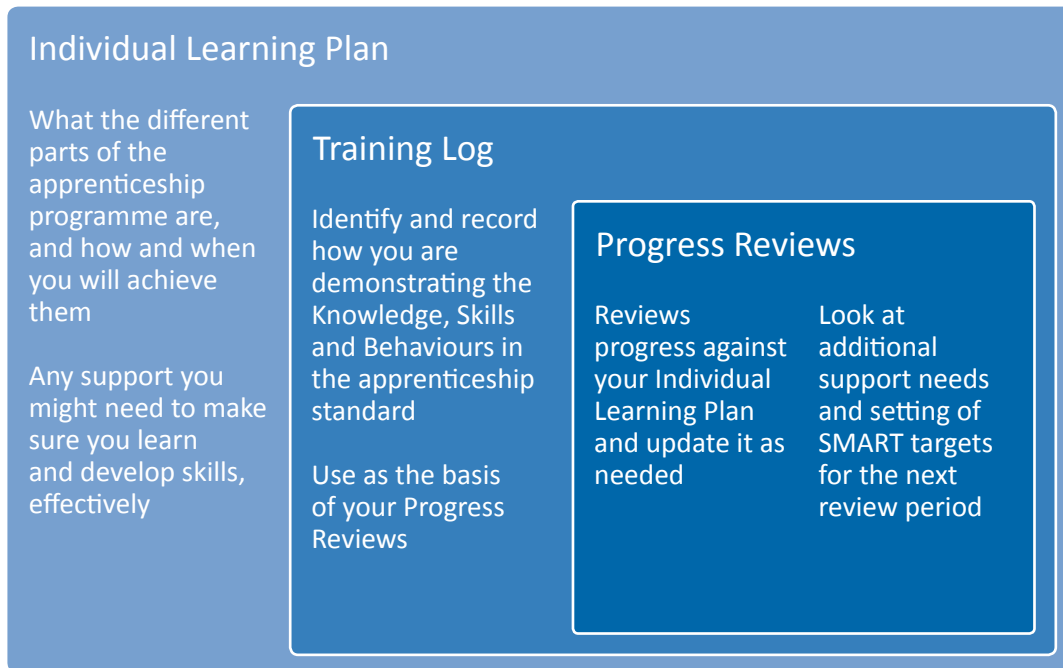
- Chronological (put in dates so you can see changes over time)
- What you are reflecting on (the task, learning or work encounter)
- Your thoughts on the matter
- What you will do next

Remember, you are not writing your diary for someone else to read, you are writing it to remind yourself of what you were thinking at the time when it comes to write your reflective statement.

If you do not want to keep a diary, think about adding this reflective dimension to your training log.

# BUILDING YOUR PORTFOLIO AND REFLECTIVE STATEMENT CONTINUED

## Learning Overview



© Association of Taxation Technicians 2017

Reproduction, copying or extracting by any means of the whole or part of this publication must not be undertaken without the written permission of the publishers.

This publication is intended to be a general guide and cannot be a substitute for professional advice. Neither the authors nor the publisher accept any responsibility for loss occasioned to any person acting or refraining from acting as a result of material contained in this publication.

### Association of Taxation Technicians

1st Floor, Artillery House  
11-19 Artillery Row  
London SW1P 1RT  
T: 020 7340 0550  
E: [info@att.org.uk](mailto:info@att.org.uk)  
W: [www.att.org.uk](http://www.att.org.uk)

A company limited by guarantee.  
Registered office as above.  
Company registration number 2418331  
Charity number 803480

