

Portfolio Guidance

What's Included

This document contains guidance information regarding the development of evidence portfolios for supporting professional discussions on level 3 and 4 data technician and analyst programmes. It will support you in understanding:

- Portfolio Submissions
- Cover Pages and Branding
- Contents Pages
- Submission One Guidance
- Submission Two Guidance
- Evidence Piece Guidance
- Evidence Highlight Pro-Forma
- General Tips and Advice
- Appendix

Portfolio Submissions...

What is a portfolio?

The portfolio facilitates your professional discussion (Assessment Method 2 (AM2)) during your End Point Assessment (EPA) at the end of the programme.

Quite simply, your portfolio will be a single Microsoft Word document containing an introduction followed by several work-based evidence pieces.

These work-based evidence pieces will showcase your competency in the knowledge, skills, and behaviours (KSBs). The evidence embedded will primarily take the form of screenshots of your day-to-day activities. (See Evidence Highlight Pro-Forma Section for details)

The occupation standards including the competency KSBs you will work towards and evidence, are mandated by the Institute of Apprenticeships and are available from the below link.

<https://www.instituteforapprenticeships.org/apprenticeship-standards/>

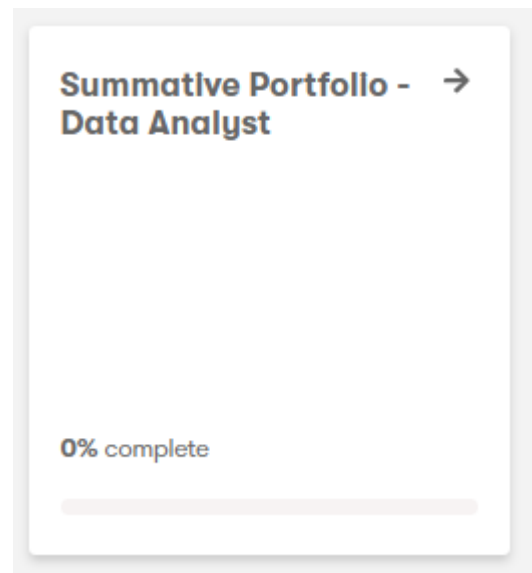
The portfolio and evidence included is not directly assessed but rather is an opportunity to collate work-based experience that develops your competency and enables you to traverse complex and professional conversations surrounding the standard and achieve at the EPA.

Submissions

We use the term submission to refer to a portfolio milestone, a portion of the portfolio to be submitted for feedback by a specific date. There are to be 5 submissions throughout the duration of your time on programme.

The submission dates are to be agreed between you, your coach, and line manager. We appreciate that each workplace will have more appropriate times to make evidence pieces fit, deadlines should align realistically with the opportunities you have in the workplace to collate complete evidence pieces of evidence.

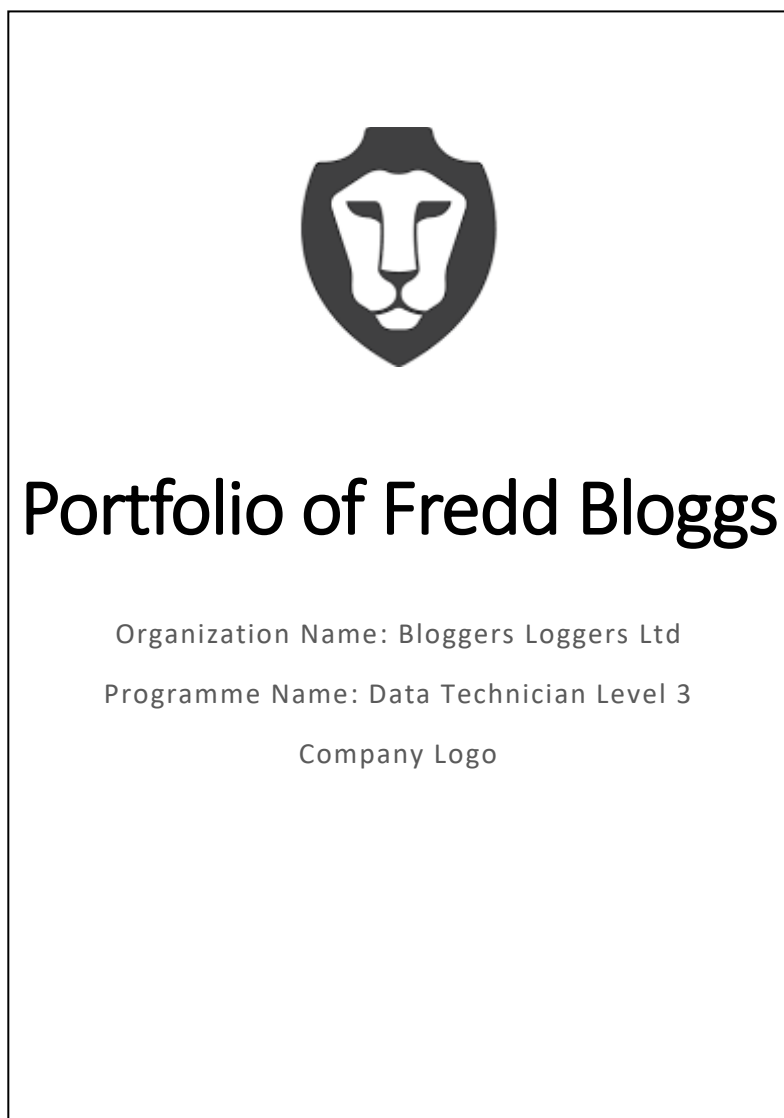
All submissions are to be done on the Hub in the Summative Portfolio tile.



Feedback

For each submission you will receive written feedback from your coach. It is up to you to implement the received feedback. Your following submission will be the same document with the embedded feedback included as well as the next evidence piece/s.

Cover Pages and Branding...



As well as including the required information above, aim to make this page interesting and engaging. First impressions count and it doesn't hurt to start off with a positive and professional tone.

Consider adding a banner in the header and/or a logo in the footer as can be seen above. **(This example and this document has the BPP branding and logo, make sure use your own)**

This will start the portfolio professionally and add to its readability. Both professionalism and readability are things the external assessors have requested to be strongly considered throughout the development of the entire portfolio.

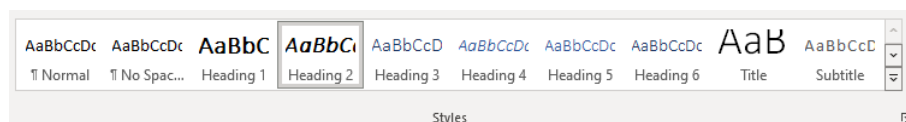
Some organizations have their own branded templates. Using them is advised where possible. They can often make it easier to ensure readability and professionalism.

Contents Pages...

The contents table below shows a suggested heading structure for your portfolio. Use Microsoft Word's Styles feature to automate the creation of your contents page. This can ensure your portfolio has strong readability, professionalism and can facilitate high quality feedback. (Give evidence pieces a more descriptive label than 'Evidence Piece One' to improve readability)

Contents	
<i>Portfolio Introduction</i>	1
Introduction to Organization	2
Introduction to Role	2
My Role	2
My Duties	3
SWOT Analysis and Aspirations	3
Self SWOT	3
Aspirations	3
<i>Evidence Piece One</i>	4
Introduction to Evidence Piece One	4
Evidence Highlights	4
Evidence Highlight One: K7.1, S4.2	4
Evidence Highlight Two: K3.2, S2.2 (Example KSBs, you will chose them)	4
Conclusion to Evidence Piece One	5
<i>Evidence piece Two</i>	5
Introduction to Evidence piece Two	5
Evidence Highlights	6
Evidence Highlight Three: K1.6, S3.1	6
Evidence Highlight Four: K5.2, S5.2	6
Conclusion to Evidence piece Three	8

Monitor heading hierarchy using the **navigation pane** and the Microsoft Word 'Styles' feature.



Mapping KSB location in the portfolio MUST be done with every submission in a separate document. (See KSB tracking document). This will be used to track your progress, set targets, and ensure EPA readiness. HELPFUL HINT: To make mapping easy, label the KSB evidenced in the subheadings. Microsoft Word will automatically map their location by updating the table contents.

Submission One - Guidance...

The first submission will be slightly different to those that follow as it is simply an introduction to your portfolio and NOT a work-based evidence piece. As such, there is **no need to include KSB evidence highlights** in the first submission.

This introduction is purely to provide context for the several work-based evidence pieces that will follow.

This is NOT an assignment briefing but rather some suggestions to get you started in writing a great introduction. Any questions embedded are just suggestions, your responses to them are NOT individually assessed.

Portfolio Writing

- Contrary to typical academic writing, you **MUST always use the first-person narrative** within your portfolio. Stating, I did this..., this is my... etc. The assessors want to know exactly what YOU have done in this portfolio, not your team or colleagues.
- No references are necessary but do not copy and paste. **Paraphrasing is acceptable but copying directly will flag in the plagiarism checker on your final submission and result in failing the programme.** As this is an account of the things you have done, the need for this should be rare but if done to offer context and supplement your learning it is acceptable.
- The Institute of Apprenticeships has released the following guidance on the fair use of using AI assistants like ChatGPT.

Use of Artificial Intelligence (AI) in EPA:

- where AI has been used as part of the apprentice's day-to-day work and forms part of a project report, presentation, or artefact, it should be referenced as such within the work. AI must not be used to produce the report or portfolio
- where AI has been used as part of a portfolio that underpins an interview or professional discussion or any other assessment method, it should be fully referenced within the portfolio
- EPA must be carried out in accordance with the EPA plan and any project reports, presentations, artefacts etc must be the apprentice's own work

Example:

If you are adding several citations in your Harvard-style paper, it will look like this:

Citation:

If the article has no author, you will cite the organization for that AI tool or software that write the article for you, i.e. "Open.AI," for if you generate a blog/article with chatGPT:

(OpenAI, 2023)

In-text citation: (ChatGPT, 2023)

This citation format is used when citing a specific point or piece of information within the text of your paper. In this example, "ChatGPT" is the author or organization responsible for the chatbot, and "2023" is the year the conversation occurred.

While adding a reference citation:

ChatGPT. (2023) "How to Cite ChatGPT in Different Writing Styles." Chat conversation.

Submission One - What to Include...

Use the pointers below as a guide for your introduction write up. They don't need to supply all the content, you CAN explore ideas outside of what's mentioned below. You can use resources such as google, ask your colleagues, or your company website to gather information and add context for the external assessors. This will demonstrate an awareness of your organisation and the domain of the data you work with.

Please ensure you include a cover page, contents page and introduction.

- Introduction to your organization.
 - What does your organisation do? - Couple of sentences for context.
- Introduction to My Role
 - How do you contribute to the use of data in the business?
 - How do you keep data safe and secure in your role?
 - Have you just joined the company, or have you been at the company for a while?
 - Give an overview of your role.
 - **Utilize the duties section on the IATE occupation standard to explain how your role is or will be related to being a data professional. (Definitely do this, it adds great context.)**
- SWOT Analysis and Aspirations. This section is really to help you potentially think of areas for growth as well as improving at self-reflection and critique and to possibly identify future evidence opportunities.
 - Complete a SWOT analysis about yourself.
 - Start to think about how you can turn your weaknesses or threats into opportunities to learn and develop. Can you relate this to the occupation standard?
 - Aspirations. Talk about your goals. Do you have 5-yr plan?

Including a cover page and contents page it is expected that the introduction submission will be no more than 4-5 pages.

Submission Two Onwards...

Evidence Pieces:

Your portfolio evidence must be collated into evidence pieces. (A minimum of 6 larger evidence pieces or 10 smaller evidence pieces would be ideal in the final submission)

After your introduction, the subsequent sections will all be **evidence pieces**.

They are NOT assignments or essay-style assessments given to you, but rather your own self-guided work-based evidence collations.

To confirm:

- You will NOT be given projects/assignments to do in the workplace.
- You will be making evidence pieces from the things you do in the workplace.

You do have some free reign over how you define and compile a evidence piece and can discuss this further with your coach. You could take one of two approaches with this. It could be that:

1. You consider the work you do in the workplace (possibly a current project) and see how you can tie it into some of the KSBs. A single live project in the workplace that you've worked on would be ideal. You use screenshots to visualize things that show you're competent in the KSBs and ensure the write-up around them justifies it. It helps to always be collating evidence as you go along. Familiarity and study of the KSBs early in the programme can help develop this ability.

Or

2. You look at the KSBs and pro-actively seek opportunities to show yourself competent in them, while producing work that could hold value to your workplace. (KSBs recently covered in the webinars could be a wise option but don't restrict yourself)
 - a. You liaise with your line manager or other colleagues to find an evidence piece opportunity to create or become involved in.
 - b. Or, a holistic evidence piece could also be acceptable, e.g., "Shopping Data Preprocessing Request Project", where you collate your exposure to related tasks around data preprocessing. Essentially, multiple tasks you've undertaken under the overarching theme of a new way you can now provide specific value to your organisation.

In either approach, you write up some work and you link it to the KSBs with supporting screenshots. It could be the first evidence pieces are more Type 1, the final evidence pieces more Type 2, to cater for leftover KSBs.

Remember:

- **Always write your portfolio in the first person so we know what YOU have done!**
- **ONLY EVIDENCE THE AM2 (PORTFOLIO DISCUSSION) KSBs**

Evidence Piece Guidance...

Structuring an Evidence Piece into 3 Sections:

Introduction

- Introduce the evidence piece. Really discuss the **situation** to set the context. It may be that some domain knowledge explanations could help the reader understand if needed.
- Discuss how you knew what was required of you. Sometimes this is called a discovery phase or requirements gathering. Discuss the briefing, or even better, show the communications you were given and the confirming questions you asked. Identify any assumptions you made and explain why you made them.
- **Describe** the scope of the evidence piece from beginning to end. How did you know what the sequence of individual **tasks** would need to be. Match it up to the data lifecycle and explain where the work you did fits in.
- Highlight any iterations that changed the scope.
- Explain what the intended **business value** was.
- Finish with some bullet points that give a summary of the evidence which is about to follow.

Evidence Highlights– Actions Breakdown

- This is where you **explain** and showcase the **actions** you took to complete the evidence piece.
- Make sure there are ALWAYS of screenshots. Storyboarding can be useful.
- You will use this portfolio in your AM2 EPA. So, make sure it provides you with excellent prompts such that you can tell the story of your evidence piece when questioned without having to read verbatim. Remember, you'll need to answer open ended questions about it in up to over a year's time.
- **Adhere to the good evidence pro-forma guidance (next page) to structure evidence.**
- Redact any personal or sensitive information. If you are unsure if a screenshot is compliant with your data policies or procedures, talk to your line manager and/or your coach.

Conclusion

- **Summarise** the evidence piece's outcomes or the **results** of the evidence piece.
- What decision makers/stakeholders can now derive insight?
- What data driven decisions can now be made?
- Bring it back to the **business value**.
- Could this be improved upon?
- What impact did it have?

STAR model – Situation, Task, Action, Result – may be familiar from job interview preparation. The same model is preferred by the external assessors to add narrative to evidence pieces. It also improves your data story telling skills.

Evidence Highlight Pro-Forma ...

The **Evidence Highlights (Breakdown of Actions)** is the place to ensure your competence of the KSBs is proven.

- You may have multiple highlights in a single evidence piece.
- Each evidence piece could support multiple KSBs.
- Aiming for one evidence highlight to one KSB could help with clarity and easy identification of which you are hitting and where.
- You can hit the KSB multiple times across different evidence pieces/projects, in a holistic manner but when you complete the programme and come to mapping them, you will state the piece of evidence that has hit that criteria the most first, then descend the evidence on best fit.
- Signposting your KSBs by labelling them in subheadings, as can be seen on page 4 is ideal.
- **Note KSBs signposting, comments in the comments sections, and direct references to the KSBs must be omitted in the final submission.**
- For mapping/tracking and feedback however, they can stay until the end.

For every evidence piece consider and implement the guidance below wherever possible.

Showing your Understanding

Introduce your evidence and set the context of it in relation to the KSB components you're evidencing over a few paragraphs. (But don't mention the KSBs directly)

You need to become well traversed around the evidence and the KSB, so use this as an opportunity to ingrain the competency and your understanding of it. If there is any technical terminology, you should elaborate on it and explain what it means through your own research or what you have learnt in the webinars. **(SEE APPENDIX FOR GUIDANCE)**

Remember, you'll need to answer open ended questions about it in potentially over a year's time.

As some as the KSBs can feel a bit abstract, use this section to **justify** exactly how you are meeting the KSBs in the evidence you are about to show.

DEFINITELY- Use the keywords, phrases, and language from the KSBs you're aiming to provide evidence for. This ensures there is relevance and develops your ability to communicate the technical concepts effectively. It also makes it more obvious for the assessor. Conversely, implicit evidence should be avoided to avoid assessor confusion.

Evidence Highlight Pro-Forma ...

Show the Evidence – Your Work-Based Application

(This could be 1 or multiple images. It could be a story board, a before and after, the policies you follow and you following them, an email request and the output. Some of the KSBs have multiple components so you could put an image for each of them here.)



There is a golden rule to follow, '**Show Me, Don't Tell Me**', write-up alone to demonstrate knowledge as evidence is not acceptable. It **MUST** be work based application.

Photographic/video evidence of activities, witness statements, written feedback on email, observation reports, screenshots, data records, peer reviews, notes from meetings/interviews, showing functions you have used in excel, showing research you did to know which function to use.

Show Higher Understanding - Evaluation

To really show you have given the competency some thought, critique this evidence. Evaluate it over a few paragraphs.

- Say something good about it, explain how it's **valuable**.
- Explain how you could improve on this in the future. What might a more advanced higher-level approach look like?

Consider how the KSB evidence may differ.

K=Knowledge: An overview of your knowledge and how this links to your current task.

S=Skills: Evidence of your skills, this could include screenshots or details of the process you have followed.

B=Behaviours: How you have displayed certain behaviours within your task.

General Tips and Advice...

4. Business Value

Identifying the purpose of the evidence pieces is a great way to impress the external assessors. They don't want to see work done just for the sake of developing the portfolio. But rather, they want to see the **positive impact** of your work-based application.

To do this make sure you are identifying the business value of the evidence pieces you are engaged with.

Generally, but not exclusively, data professionals aim to help stakeholders make **data driven decisions** by offering them **actionable insights** that lead to:

- **Financial value:** increasing profit / decreasing costs.
- **Operational value:** Reducing the time taken, making things happen faster, automating, increasing efficiency/productivity.
- **Strategic value:** Making operations more sustainable, risk mitigation, unlocking new opportunities.
- **Quality value:** Making the product or service better for the customer/client/stakeholder.

Quite often these are connected, or they complement one another. This is not a comprehensive list but is something you can draw inspiration from when identifying the business value of your evidence pieces.

Other

- Refrain from putting evidence in the introduction or conclusion sections of your evidence pieces.
- Do not talk directly about the KSBs in the write-up.
- You could potentially tick off multiple KSBs for certain highlights of evidence. Though, consider if it may make the assessment easier for you to keep them separate during the discussion.
- Pair KSBs that are very similar. This is where the exception to the point above lies.
- Be concise, yet comprehensive. There is no word count but try not to convolute your write up with 'waffling'. Think about what a reasonable amount of write up would be needed to prove you are capable and competent with the KSB's criteria.
- Ensure that you are using the three-step process wherever possible for each evidence piece.
Understanding – Application – Evaluation
- Ensure a good narrative is present and a strong contextual understanding is conveyed.

Appendix...

Student Evaluation of KSBs, their Components, Keywords, and Phrases

To ensure you are covering all the AM2 KSBs in their breadth and that become well traversed around the key terminology, break down the ksbs into their key components.

Write in your own words exactly what each means in the context of the KSB.

Use what you learn in webinars and do self-directed learning to do this. You can eventually paste this into your portfolio to explain contextual relevance of evidence. If you do this early on it can pre-prepare you for webinar content and enhance your portfolio development and the speed of which you write up evidence pieces. If you put in approximately 50-100 words each in your own words, you can eventually copy this write into your portfolio where appropriate.

IT MUST BE IN YOUR OWN WORDS TO AVOID PLAGIARISM.

KSB Components	KSB	Key Components / Keywords / Terminology	<u>Student Evaluation of Component</u>
K1.1	Range of different types of existing data. Common sources of data - internal, external, open data sets, public and private. Data formats and their importance for analysis. Data architecture - the framework against which data is stored and structured including on premises and cloud.	Range of existing data types	
K1.2	Range of different types of existing data. Common sources of data - internal, external, open data sets, public and private. Data formats and their importance for analysis. Data architecture - the framework against which data is stored and structured including on premises and cloud.	sources of data	
K1.3	Range of different types of existing data. Common sources of data - internal, external, open data sets, public and private. Data formats and their importance for analysis. Data architecture - the framework against which data is stored and structured including on premises and cloud.	internal data	
K1.4	Range of different types of existing data. Common sources of data - internal, external, open data sets, public and private. Data formats and their importance for analysis. Data architecture - the framework against which data is stored and structured including on premises and cloud.	external data	

DEFINITELY- Use the keywords, phrases, and language in the component column. This ensures there is relevance and develops your ability to communicate the technical concepts effectively. It also makes it more obvious for the assessor where you are supporting the KSBs.