Portfolio of Evidence Tracker

Use this document to record what evidence you have against the standard. Each piece of evidence in your Portfolio of Evidence should be clearly labelled to show the evidence type and a number; for example, WA1 (Written account 1) or O1 (Practical Observation by ITP1). The Portfolio of Evidence should be a minimum of 8 pages. NCFE believes in quality over quantity, and we recommend that the Portfolio of Evidence contains 15 pieces of evidence. However, this **must not** exceed 25 discrete pieces of evidence. Any audio recordings that are submitted as part of the Portfolio of Evidence **must** have a maximum duration of one hour in total.

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| **Mandatory Portfolio of Evidence at Gateway** | **Confirmed?** |
| The Portfolio of Evidence contains evidence related to all KSBs that will be assessed by the Portfolio-based Interview. KSBs marked with an Asterix in the evidence tracker can be covered in either the Portfolio-based Interview or the Project Presentation. |  |
| The Portfolio of Evidence does **not** contain more than 25 separate discrete pieces of evidence. |  |
| Any audio recordings included do **not** come to more than one hour duration in total. |  |
| Any employer contributions in the Portfolio of Evidence are focused on direct observation of the apprentice’s performance and **not** opinions. |  |

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| **Apprentice Name:** |  | **Apprentice Signature:** |  |

Example

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| **KSB Group: Stakeholders** | | **Evidence** | | |
| **KSB** | **Pass Criteria** | **Reference** | **Page No. or Timestamp** | **Type** |
| Knows organisational structure and demonstrates understanding of how their work benefits the organisation. | Understands the structure of the organisation and how their work contributes. | WA2  ES1 | Pages 2-3  Page 1 | WA  ES |
| Knows how they fit within their team and recognises how their skills can help them to progress their career. | Identifies their role within the team and value of their skills. | PE3  Q2 | Page 2  1 min 20 | PE  Q |

**Evidence Key:**

**O** – Observation by ITP, **WA** – Written Account, **WT** – Witness Statement by third party, **ES** – Employer Statement, **PE** – Product Evidence e.g. CPD records etc.

**Q** – Questioning

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| **KSB Group: The Organisation** | | |  | **Evidence** | | |
| **KSB** | **Pass Criteria** | **Distinction Criteria** | | **Reference** | **Page No. or Timestamp** | **Type** |
| Understands organisational purpose, activities, aims, values, vision for the future, resources and the way that the political/economic environment affects the organisation. | Shows a working knowledge of the organisations purpose, aims and ways of working, putting it in context of the local (or sector) environment.  Provides some understanding of the political and economic environment | Shows a thorough understanding of the organisation’s purpose, aims and way of working, putting it in context of the wider economy and political environment. | |  |  |  |

Knowledge

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| **KSB Group: Value of their Skills\*** | | |  | **Evidence** | | |
| **KSB** | **Pass Criteria** | **Distinction Criteria** | | **Reference** | **Page No. or Timestamp** | **Type** |
| Knows organisational structure and demonstrates understanding of how their work benefits the organisation.  Knows how they fit within their team and recognises how their skills can help them to progress their career. | Understands the structure of the organisation and how their work contributes.  Identifies their role within the team and value of their skills. | Understands the structure of the organisation and is able to discuss how different teams support each other.  Understands the contribution their work makes and promotes its value.  Identifies their role within the team and is able to compare their skills with others. | |  |  |  |
| **KSB Group: Stakeholders\*** | | |  | **Evidence** | | |
| **KSB** | **Pass Criteria** | **Distinction Criteria** | | **Reference** | **Page No. or Timestamp** | **Type** |
| Has a practical knowledge of managing stakeholders and their differing relationships to an organisation. This includes internal and external customers, clients and/or suppliers.  Liaises with internal/external customers, suppliers or stakeholders from inside or outside the UK.  Engages and fosters relationships with suppliers and partner organisations. | Understands how to manage stakeholders, e.g. clarifying and delivering on expectations.  Demonstrates they have worked with stakeholders to achieve results. | Understands and follows the principles of stakeholder management.  Goes beyond expectations to build constructive relationships with stakeholders | |  |  |  |

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| **KSB Group: Relevant Regulation** | | |  | **Evidence** | | |
| **KSB** | **Pass Criteria** | **Distinction Criteria** | | **Reference** | **Page No. or Timestamp** | **Type** |
| Understands laws and regulations that apply to their role including data protection, health & safety, compliance, etc.  Supports the company in applying the regulations. | Demonstrates knowledge of relevant laws and regulation and consistently follows them | Shows a thorough knowledge of relevant laws and regulations and consistently follows them.  Champions adherence to relevant laws and regulation within the organisation | |  |  |  |

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| **KSB Group: Policies** | | |  | **Evidence** | | |
| **KSB** | **Pass Criteria** | **Distinction Criteria** | | **Reference** | **Page No. or Timestamp** | **Type** |
| Understands the organisation's internal policies and key business policies relating to sector. | Understands and follows the organisation’s internal policies. | Understands and promotes the organisations internal policies. | |  |  |  |

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| **KSB Group: Business Fundamentals** | | |  | **Evidence** | | |
| **KSB** | **Pass Criteria** | **Distinction Criteria** | | **Reference** | **Page No. or Timestamp** | **Type** |
| Understands the applicability of business principals such as managing change, business finances and project management. | Knows the fundamentals of business, including finances, managing change and project management. | Knows the fundamentals of business, can relate them to their administrative occupation and show how they make an impact. | |  |  |  |

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| **KSB Group: External Environment Factors** | | |  | **Evidence** | | |
| **KSB** | **Pass Criteria** | **Distinction Criteria** | | **Reference** | **Page No. or Timestamp** | **Type** |
| Understands relevant external factors e.g. market forces, policy & regulatory changes, supply chain etc. and the wider business impact).  Where necessary understands the international/global market in which the employing organisation is placed. | Understand the external factors affecting the organisation and how they relate to their role. | Shows a deep understanding of the external factors facing the organisation and how they relate to their role.  Seeks additional information about how those factors are developing. | |  |  |  |

Skills

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| **KSB Group: IT\*** | | |  | **Evidence** | | |
| **KSB** | **Pass Criteria** | **Distinction Criteria** | | **Reference** | **Page No. or Timestamp** | **Type** |
| Skilled in the use of multiple IT packages and systems relevant to the organisation in order to write letters or emails, create proposals, perform financial processes, record and analyse data. Examples include MS Office or equivalent packages.  Able to choose the most appropriate IT solution to suit the business problem.  Able to update and review databases, record information and produce data analysis where required. | Demonstrates they can use IT packages, specifically to write letters or emails, and to record and analyse information.  Able to perform tasks relevant to their role using IT packages without supervision. | Consistently demonstrates they can use IT packages and can provide varied, quality examples.  Able to perform tasks relevant to their role using IT packages and can coach others in using IT. | |  |  |  |

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| **KSB Group: Record and Document Production** | | |  | **Evidence** | | |
| **KSB** | **Pass Criteria** | **Distinction Criteria** | | **Reference** | **Page No. or Timestamp** | **Type** |
| Produces accurate records and documents including emails, letters, files, payments, reports and proposals.  Makes recommendations for improvements and present solutions to management.  Drafts correspondence, writes reports and able to review others' work.  Maintains records and files, handles confidential information in compliance with the organisation's procedures.  Coaches others in the processes required to complete these tasks. | Records are accurate, rarely require correction and are treated confidentially.  Recommendations and solutions only need minor improvements.  Supports others in producing documents and can provide examples. | Records are consistently accurate and confidential.  Recommendations are insightful, clearly recorded and results in a clear benefit to the organisation.  Provides coaching to others and records good performance in feedback. | |  |  |  |

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| **KSB Group: Interpersonal Skills\*** | | |  | **Evidence** | | |
| **KSB** | **Pass Criteria** | **Distinction Criteria** | | **Reference** | **Page No. or Timestamp** | **Type** |
| Builds and maintains positive relationships within their own team and across the organisation.  Demonstrates ability to influence and challenge appropriately.  Becomes a role model to peers and team members, developing coaching skills as they gain area knowledge. | Works effectively with a range of people.  Influences and challenges peers when necessary.  Supports others in the organisation and demonstrates coaching skills. | Influences managers as well as peers.  Constructively challenges managers, as well as peers, when necessary.  Proactively offers to coach others and has had good performance recorded in feedback. | |  |  |  |

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| **KSB Group: Communications\*** | | |  | **Evidence** | | |
| **KSB** | **Pass Criteria** | **Distinction Criteria** | | **Reference** | **Page No. or Timestamp** | **Type** |
| Demonstrates good communication skills, whether face to face, on the telephone, in writing or on digital platforms.  Uses the most appropriate channels to communicate effectively.  Demonstrates agility and confidence in communications, carrying authority appropriately.  Understands and applies social media solutions appropriately.  Answers questions from inside and outside of the organisation, representing the organisation or department. | Demonstrates they can communicate clearly, in both written and verbal communication.  Shows flexibility to different situations.  Uses appropriate communication channels dependent on the subject matter.  Demonstrates ability to answer queries effectively from both inside and outside the organisation. | Communication is consistently clear, both written and verbally.  Champions an appropriate choice of communication channels.  Consistently answers queries from both inside and outside of the organisation in a confident way. | |  |  |  |

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| **KSB Group: Quality** | | |  | **Evidence** | | |
| **KSB** | **Pass Criteria** | **Distinction Criteria** | | **Reference** | **Page No. or Timestamp** | **Type** |
| Completes tasks to a high standard.  Demonstrates the necessary level of expertise required to complete tasks and applies themselves to continuously improve their work.  Is able to review processes autonomously and make suggestions for improvements.    Shares administrative best-practice across the organisation, e.g. coaches others to perform tasks correctly.  Applies problem-solving skills to resolve challenging or complex complaints and is a key point of contact for addressing issues. | Checks own work before submission and makes improvements.  Work is largely accurate and meets expectations.  Identifies areas for improvement and can justify why.  Promotes best practice examples of administration, such as accurate records. | Takes ownership for work and applies processes for checking work.  Work is consistently accurate and meets the agreed outcomes.  Recommends and implements process improvements.  Proactively offers to coach others in an area of work and communicates requirements for work. | |  |  |  |

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| **KSB Group: Planning and Organisation\*** | | |  | **Evidence** | | |
| **KSB** | **Pass Criteria** | **Distinction Criteria** | | **Reference** | **Page No. or Timestamp** | **Type** |
| Takes responsibility for initiating and completing tasks, manages priorities and time in order to successfully meet deadlines.  Positively manages the expectations of colleagues at all levels and sets a positive example for others in the workplace.  Makes suggestions for improvements to working practice, showing understanding of implications beyond the immediate environment (e.g. impact on clients, suppliers, other parts of the organisation).  Manages resources e.g. equipment or facilities.  Organises meetings and events, takes minutes during meetings and creates action logs as appropriate.  Takes responsibility for logistics e.g. travel and accommodation. | Plans work and achieves deadlines.  Shares areas to improve plans with others.  Effectively manages resources and meetings.  Takes responsibility for logistics and can provide examples. | Makes plans that efficiently maximise resources and personally ensures results are achieved.  Improves the management of resources e.g. identifies cost savings or process improvements.  Is proactive in taking responsibility for areas of logistics and has excellent examples to demonstrate this. | |  |  |  |

Behaviours

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| **KSB Group: Professionalism** | | |  | **Evidence** | | |
| **KSB** | **Pass Criteria** | **Distinction Criteria** | | **Reference** | **Page No. or Timestamp** | **Type** |
| Behaves in a professional way. This includes personal presentation, respect, respecting and encouraging diversity to cater for wider audiences, punctuality and attitude to colleagues, customers and key stakeholders.  Adheres to the organisation's code of conduct for professional use of social media.  Acts as a role model, contributing to team cohesion and productivity – representing the positive aspects of team culture and respectfully challenging inappropriate prevailing cultures. | Consistently behaves in a professional way, showing punctuality, respect for others and personal presentation.  Follows the standard of conduct required by the organisation. | Is a role model employee, showing professionalism in their conduct, punctuality, presentation and respect for others, irrespective of background; even in difficult circumstances.  Can be relied upon to represent the team and be an ambassador for the organisation. | |  |  |  |

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| **KSB Group: Personal Qualities** | | |  | **Evidence** | | |
| **KSB** | **Pass Criteria** | **Distinction Criteria** | | **Reference** | **Page No. or Timestamp** | **Type** |
| Shows exemplary qualities that are valued including integrity, reliability, self-motivation, being pro-active and a positive attitude.  Motivates others where responsibility is shared. | Regularly shows integrity, reliability, positivity and self-motivation. | Always shows integrity, reliability, positivity and self-motivation and successfully encourages others to show more of these qualities. | |  |  |  |

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| **KSB Group: Managing Performance\*** | | |  | **Evidence** | | |
| **KSB** | **Pass Criteria** | **Distinction Criteria** | | **Reference** | **Page No. or Timestamp** | **Type** |
| Takes responsibility for their own work, accepts feedback in a positive way, uses initiative and shows resilience.  Takes responsibility for their own development, knows when to ask questions to complete a task and informs their line manager when a task is complete.  Performs thorough self-assessments of their work and complies with the organisation's procedures. | Clarifies requirements and takes responsibility for work produced.  Acts with responsibility and delivers their work to the right level of quality without requiring additional supervision and coaching.  Asks for feedback and takes feedback on board. | Shows a strong personal responsibility for all aspects of their work and can work with minimal supervision, whist adhering to policies, procedures and standards.  Takes feedback on board and continually assesses the quality of their work. | |  |  |  |

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| **KSB Group: Adaptability\*** | | |  | **Evidence** | | |
| **KSB** | **Pass Criteria** | **Distinction Criteria** | | **Reference** | **Page No. or Timestamp** | **Type** |
| Is able to accept and deal with changing priorities related to both their own work and to the organisation. | Accepts and responds positively to change. | Accepts change, evaluates the impact of any change and seeks to use it to improve their work. | |  |  |  |
| **KSB Group: Responsibility\*** | | |  | **Evidence** | | |
| **KSB** | **Pass Criteria** | **Distinction Criteria** | | **Reference** | **Page No. or Timestamp** | **Type** |
| Demonstrates taking responsibility for team performance and quality of projects delivered.  Takes a clear interest in seeing that projects are successfully completed, and customer requests handled appropriately.  Takes initiative to develop own and others' skills and behaviours. | Accepts personal responsibility for their own work, delivering their work on time and to the right level of quality.  Demonstrates ownership and willingness to see work completed.  Applies initiative in developing their own skills and behaviours. | Role model who takes personal responsibility for themselves and peers.  Aims to deliver work within targets and deliver more than required in their role.  Proactively seeks opportunities to develop themselves and shares this learning with others. | |  |  |  |