A Candidates Guide to Core Skills

Getting Started

For a quick start to portfolio building, following these simple steps will make it easier

- Use the checklist to identify what required activity you can & can't do and to identify the 3 types of evidence you will use for each task *(Remember that work-based evidence has a time limit of 2 years from the completion date)*
- Complete your matrices as you gather your evidence – this will allow you to see where you need to target your evidence collection (you will see the blank criteria columns)
- Use a simple referencing system, this will allow effective cross-referencing throughout the portfolio. Use the same number on all matrices
- Present your evidence in 'bite-size' chunks – this will allow for continuous assessment to take place and review your progress & achievement regularly
- Be clear on what evidence you are collecting, for what task & criteria
- Be methodical and keep focused

Identify a 'base task' for each required activity – this will ensure that by the time you have completed your portfolio, all the required activity has been met and will assist you in understanding how the required activity fits into each task.

Core Skills Base Tasks

	Task Title	**Base Task for**
Task A	Verbal Communication	Dealing with 5 consumer complaints
Task B	Written Communication	Dealing with 5 requests for business advice
Task C	Organisational Skills	Completing 2 initiative based projects
Task D	Information Skills	Carrying our 5 on-site visits
Task E	Cognitive Skills	Examine & report on 15 products & services
Task F	Investigative Skills	Undertaking 2 full investigations

Once you have logged the required activity to the base task using the matrix, you can then look at cross-referencing it in to the other tasks. Using Task A as an example, here's how you do it:

> You have completed your matrix with evidence of the 5 consumer complaints using your complaint records as evidence. If you have written to the consumer, or a trader, attach the letters to the complaint record, you can then cross-reference the evidence into Task B. If you have had to visit the trader as part of the complaint, attach your visit report sheet, you should then be able to include it in Task D as well. If the complaint was in relation to faulty goods, you may have purchased the product from the trader, and then examined it for compliance back at the office. Attach the information regarding the examination as well, and you can cross-reference it in to Task E.

Other stuff you need to know

Always use the checklist at the start of the process (available on the TSI website). This acts as a basic skills gap analysis and allows you to identify what you can complete, it will also show you where you may need additional support; full training / up-skilling A completed checklist will act as a foundation for developing the assessment plan, and the plan will be more meaningful as you will have already identified evidence collection against required activity. It is recommended that you complete the Checklist and take it with you to your initial meeting with your assessor.

You don't want to collect a lot of evidence before submitting it for assessment as this can cause confusion (if you have mis-understood the requirements or you have been 'tick happy' on your matrices). What you should be presenting for assessment is a small amount of evidence from a particular required activity eg. Present 3 consumer complaints that you have dealt with and will map them into the base task ready for assessment (this will be your first assessment). This will allow your assessor to see whether you have understood how to complete his matrices, how to identify criteria met and whether the evidence is of the required standard. Any concerns or issues can be address early on in the process. Your second assessment would take place once you have mapped the same evidence into the additional tasks. As you become confident, you can start to increase the amount of evidence between each assessment.

Completing your matrices

Your primary evidence for this task is Business Advice

SKILLS SUMMARY MATRIX

TASK B - *Written communication skills*

Bast Task for Dealing with 5 Requests for Business Advice

Core Skills

Candidate Name:	**Assessor Name:**	**Internal Verifier:**
	Date of Assessments:	Sampling Dates:

Remember to list ALL types of evidence including observations, witness testimonies & questioning as well as your work-based. Associated documents are any letters, emails, faxes etc.. that correspond to the complaint.

This identifies the source of your evidence & ensures you have completed the activity

Evidence Reference	**Evidence Descriptor**	**Performance Criteria**					Required Activity												
		1	2	3	4	5	**5** requests for business advice	**5** consumer complaints	**2** full investigations	**5** on-site visits	**2** initiative based projects	Examination of & reporting on **15** products/services	Evidence of communication						
1	Complaint Record No 1234 & Associated Documentation	✓	✓		✓		1												
2	Complaint Record No 5647 & Associated Documentation	✓	✓		✓		2												
3	Complaint Record No 8924 & Associated Documentation	✓	✓	✓	✓		3												

These match the required number of required activity

Use a simple referencing system, this make cross-referencing your evidence a lot easier. Keep the same reference number throughout the different tasks

Criteria 1 & 2 will ALWAYS be met, so you will have lots of ticks in these columns

You may only meet Criteria 3 only once, which is quite acceptable

It is also acceptable for only 1 tick to be present in a criteria column. This is when something doesn't happen on a frequent basis, or you may only come across it once whilst building your portfolio. The evidence presented for this piece of criterion has to be detailed enough to show your assessor that you are able to carry out the activity. In these instances, assessors are encouraged to support the evidence with questioning, to underpin and confirm your competence.

A candidate cannot simply tick each criteria column once, as the matrix will not show the overall skills & abilities of the candidate, nor will it show that the candidate always carries out tasks to the same standard; doing something once does not show competence which is why you must tick each relevant criteria column

Evidence requirements:

The thing to remember when completing your portfolio is that your assessor, internal verifier & external verifier need to clearly see what you have done in order to meet the criteria you have ticked on your matrices.

Complaint records will be make up a large part of your work-based evidence, which is why you need to ensure that they are detailed and informative, and contain the relevant information to support the criteria claimed.

Some required activity asks for reports (examine & report on 15 products and services),. The reports are there to support your work-based evidence and you need to present the complaint records (to show why the product / service was examined), you need to show us the product (this is usually done with a photograph). The report then details the examinations/tests carried out (if you are able, get a photograph of you carrying out the examination) your findings, further actions & outcome. The report shouldn't be more than an A4 piece of paper; it's a report not an essay! If you keep detailed complaint records, you may find that all the required information is in the record itself, which is quite acceptable, and removes the need for a separate report.

You need to use a variety of evidence in each task, the 5 main types of evidence used in portfolio building are:

Work-based	Anything you have done at work; complaint records, letters, emails, offence reports etc.. There is a time-limit to work-based evidence which is 2 years from the completion date (when a complaint is closed, when an investigation ends).
Assessor Observation	This is when your assessor directly observes you carrying out a work based activities. They can observe you in the office, or accompany you out on a visit. On completion of the observation they complete a report form which you then reference, log on the relevant matrices, and place in portfolio as evidence. Your assessor will make it clear on the report form what criteria you have met during the observation.
Witness Observation	This is when anyone, other than your assessor directly observes you. Again, the observation can be carried out in the office, or out on a visit. They complete the same report form, the only difference is that they do not comment on criteria, they give a narrative of the observation.

NB - An observation is a snap-shot in time; you did something once

Witness Testimony	This covers a continuous period of time, when you have been carrying out activities. We usually see these from line-managers eg, I can confirm that Joe has worked in my team for the past 2 years, and during this time he has....." we then see a narrative on duties, roles & responsibilities. A Testimony should be presented on letter-headed paper, this is for authenticity & validity, but this is not always possible, if using a witness from an outside organisation try and get a company stamp or a compliment slip with signatures, this will show where the testimony has come from. You then reference the testimony, log it on the matrices, and place it in your portfolio
Questioning	Assessors are encouraged to use questioning to draw together the evidence presented. Sometimes specific questions need to be asked to cover certain criteria, this is usually when 'Where Applicable' is part of the criteria. *See below for further information on Where Applicable.* All questions must be recorded along with your responses; this is usually done on a piece of A4 paper, which you then reference, log on the matrices and place in your portfolio as evidence.

It is quite acceptable for a candidate to draft out a witness observation and/or witness testimony as they have to be written clearly to show what the candidate did. Candidates are able to write them in such a way that they directly link in to the task & criteria.

You will always have work-based evidence for every task; you then need to support it with at least 2 other types of evidence.

Your assessor needs to use at least 3 types of evidence before they are able to sign off a task – you need to remember this when working through the checklist, try and identify 3 types of evidence for each task. **Task A** is the only task in the portfolio that states **observations must be used.** Try and use both assessor & witness observations

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You now have the understanding of how to build your portfolio, so Good Luck!