CIPFA\

Portfolio Support Workshop for student members

CIPFA\

What will we cover?

- Key differences
- How to access the Portfolio
- How to Complete your Portfolio submission
- Be a STAR
- Editing and submitting your submission for approval
- Membership Ready - How to submit your Portfolio
- Q&A

Key differences

•The technical competencies that were contained within the Statement of Expertise have been included within the situation section of your 400 day log and this has been clearly linked to the development of your personal competencies within Skills and Behaviours.
•SharePoint and the use of forms have replaced the Calibrand system, to make it more user friendly and accessible
•Your line manager no longer needs to register for a MyCIPFA account
•You no longer need to log into a system, existing students will receive a link or can scan a QR code to create their first Student Portfolio Submission.
•You will need to complete as many Student Portfolio Submissions until you reach the required number of days for membership.

How to Access the Portfolio

The portfolio system will be accessed via your first Student Portfolio Submission

To access the first Student Portfolio Submission you can use the following QR code.

We will also be sending out e mails to all existing portfolio users with the following link. Student Portfolio Submission

Once you have completed your first portfolio submission you will receive a confirmation e mail, that will contain a different link to your overall portfolio in SharePoint.

You will be required to complete a Student Portfolio submission for each piece of work and will need to reuse this link.

Student Portfolio Submission

How to complete your Student Portfolio Submission

Student Portfolio Submission

* Required

CIPFA Student Information and Declaration

1. **CIPFA Student Number** *

Enter your answer

2. **Student Full Name** *

Enter your answer

3. **Would you like your results emailed to your employer**
*

○ Yes

○ No

4. **Student Email Address** *

Enter your answer

5. **DECLARATION**

Plagiarism involves presenting someone else's work or ideas as your own without proper attribution and is a breach of academic integrity. Any work presented in the portfolio must be your own work.

Any unauthorised materials, use of Artificial Intelligence or collusion with other individuals is strictly prohibited. It is your responsibility to read and be familiar with CIPFA's Assessment Offences and Generative Artificial Intelligence policies.

Any breach of academic regulations or misconduct during this examination will be managed through CIPFA's Assessment Offences process. Cases may be referred to the Disciplinary scheme.

By clicking **Agree** I confirm that I have read and accept the CIPFA Assessment Regulations and associated policies.
*

○ You must agree

Next

Page 1 of 4

Student Details

Students are required to confirm their details and agree to the plagiarism declaration for each submission.

6

Line Manager Details

Line Manager

Please provide the details of your supervisor during the period you completed the task in this submission.

12. **Line Manager First Name** *

Enter your answer

13. **Line Manager Surname** *

Enter your answer

14. **Line Manager Job Title** *

Enter your answer

15. **Line Manager Employer Name** *

Enter your answer

16. **Line Manager Email Address** *

Enter your answer

17. Is your Line Manager an Accountant *

○ Yes

○ No

Work experience summary

This is the part of the form that will be assessed when you apply for membership.

You select a skill or behavior (you can select more than one of these for each submission) and then you follow the STAR method of reflective practice.

Across the cumulation of your submissions you need to ensure you have at least one submission for each skill and behaviour.

Within the situation section you also need to ensure each submission is linked to a technical competency. Please cover as many of these as you can but, unlike the Skills and Behaviours, there is no requirement to cover all of the technical competencies.

19. **Skills** *

- [ ] Building Relationships
- [ ] Business Insight
- [ ] Communication
- [ ] Leadership
- [ ] Problem Solving and Decision Making
- [ ] Record of Prior Achievement - Portfolio Days

20. **Behaviours**

- [ ] Adds Value
- [ ] Continuous Improvement
- [ ] Ethics and Integrity
- [ ] Flexibility
- [ ] Professional Scepticism

21. **Situation**

Briefly describe the situation in which you demonstrated the required skill or behaviour and ADDITIONALLY identify which of the following technical areas this task covered
*

Enter your answer

22. Situation - Technical Area(s) *

- [ ] Planning, forecasting and budgeting.
- [ ] Financial Management.
- [ ] Financial, management, sustainability and performance reporting.
- [ ] Audit, governance and internal control.
- [ ] Transformation, risk and project management

23. **Task**

Describe your specific role and responsibilities in the example situation. *

Enter your answer

24. **Action**

Describe the actions you personally took and how these actions demonstrated the skill or behaviour. *

Enter your answer

25. **Result**

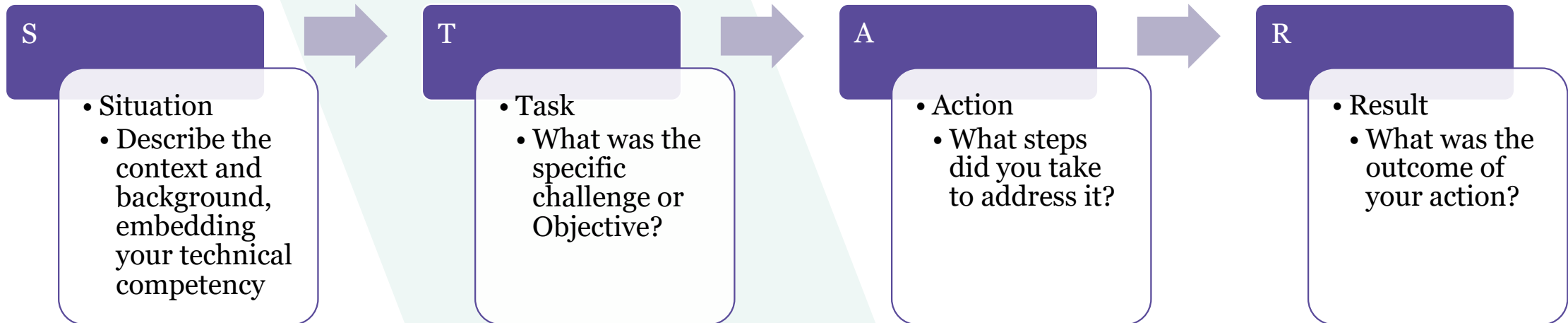Describe the outcome of the activity and the impact that this had. *

Enter your answer

Be a STAR

Completing the Work Experience Summary

For each skill or behaviour you have ticked, you should consider the following points in your narrative

S
- Situation
- Describe the context and background, embedding your technical competency

T
- Task
- What was the specific challenge or Objective?

A
- Action
- What steps did you take to address it?

R
- Result
- What was the outcome of your action?

Dos

- Do create clear and full responses
- Do ensure that you are writing "I" or "my" most of the time and not "we", "our" or "the organisation/employer"
- Do ensure your application is all your own original work

Don'ts

- Don't use acronyms, buzzwords or jargon
- Don't choose a non-finance example

Imagine the assessor as a well-informed reader – an experienced finance professional but who has no knowledge of you, your role, your Employer, its structure, ways of working etc.

Things you need to know

You cannot save and come back to a portfolio submission form unless it has been submitted.

When inputting information in the form, you can only enter 250 characters. However, you will be able to edit this in the SharePoint to include any additional information required which does not fit into this character limit.

Once submitted you can edit but whilst initially working on a submission you may prefer to do this in a word document and then copy it across.

When you submit the form, it does not automatically go to your line manager for approval. You need to follow the approval steps in SharePoint.

The portfolio submission form will automatically calculate the number of days into your SharePoint, this may however need to be amended. For example, you may have worked on a project over a six-month period but it was only 50% of your role and therefore you would not be counting the six months against this activity.

Submitting, editing and approving each entry of your Student Portfolio Submission

Submission and accessing SharePoint

Once you have submitted your student portfolio submission, you will receive a copy via email. At this stage it has not been submitted for line manager approval.

Please click the link at the bottom to view and edit your submission and any previous submissions in SharePoint.

You will also need this link to submit your submission for line managers approval.

Student Organisation : CIPFA

Student Job Title : Student and Membership Engagement Officer

Role & Responsibilities : Back office administration **Supervisor Details:**

Supervisor Name : Sophie Lauren

Supervisor Organisation : CIPFA

Supervisor Job Title : Manager

Supervisor Email : sophie.pritchard@cipfa.org

Supervisor is Accountant : Yes

Accountancy Body : ACCA

PEP Activity Details :

Activity Dates : 2024-11-03 - 2024-11-10

Skills Learned : ["Communication","Leadership","Problem Solving and Decision Making"]

Behaviours Exhibited : ["Continuous Improvement","Ethics and Integrity"]

Situation : Test

Task : Test

Actions Taken : Test

Results Achieved : Test

This form can be viewed and updated until you send it for approval please follow the link below th access this form on the Student PEP Portal

https://cipfa.sharepoint.com/sites/StudentPEP/_layouts/15/listform.aspx?PageType=4&ListId=5b9c9834%2D6908%2D41db%2Daedc%2Dba711319c9cb&ID=13&ContentTypeID=0x0100479BAECF496DC54A9BB269465E26C4B90010823BB36E43D74197290204BB6E7F85

Editing Your Submissions

Within the SharePoint site once you have submitted your Student portfolio submission form, you are then able to edit your submission, prior to submitting for approval from your line manager.

To do this you will need to click on the edit button at the top of your submission, this will then allow you to edit your responses.

Whilst reviewing and editing your submission please ensure that your PEP submission days are correct for the time you have worked on the relevant task

Review your submission for spelling and grammatical errors

Submitting your entry for approval

When you are ready to submit to your line manager for approval, you will need to edit the PEP Submission Status section of your submission within the SharePoint site.

Once you have clicked submit for approval and saved this will send an email to your nominated line manager who will then review and either approve or reject your submission.

⊘ PEP Submission Status *

Draft

📅 Completion time

Enter value here

🔲 CIPFA Student Number

Test-CIP

🔲 Student Full Name

Sophie Pritchard

🔲 Student Email Address

⊘ PEP Submission Status *

◉ Draft

○ Submit for Approval

Select Submit for Approval to send an email to your li

Submitting to your line manager and tracking approval

Request for your input

Dear test

You have been identified by Test as their Line Manager and the responsible person to approve the below Student PEP Submission.

Please review and respond to this request for Approval using either the Approve or reject button.

Student Details:

Student No. : Test
Student Name : Test
Student Email : ▮▮▮▮▮▮▮▮▮▮▮▮
Student Organisation : Test
Student Job Title : Test
Role & Responsibilities : Test

Supervisor Details:

Supervisor Name : test test
Supervisor Organisation :test
Supervisor Job Title : test
Supervisor Email : ▮▮▮▮▮▮▮▮▮▮

PEP Activity Details :

Activity Dates : 2024-10-27T00:00:00Z - 2024-11-28T00:00:00Z
PEP Days : 1 Skills Learned : ["Building Relationships"]
Behaviours Exhibited : ["Continuous Improvement"]
Situation : Test
Task :testt
Actions Taken : test
Results Achieved : test
Activity Supervisor : test test

Select one of the options below to respond

Approved   Rejected

This will then update on your records

Your line manager will receive an email containing your submission. They can approve or reject the submission here.

⊘ PEP Sub... ⌄

Approved By:sophie.pritchard... on 2024-11-07T09:37:36Z

Submit for Approval

Approved By:sophie.pritchard... on 2024-11-12T11:10:50Z

Membership ready

Before you submit for assessment you will need to check that all your submissions have been approved by your line manager and that you have reached the required number of experience days.

Checking Line Manager Sign Off

All submissions should be listed as Approved by and your line managers name and date

Checking completion of required work experience days

The sum of PEP days will show at the bottom of your SharePoint page

Submitting your Portfolio

To submit your portfolio for assessment you will need to purchase the Portfolio Submission via the CIPFA Website. There is no further action required within the Portfolio platform.
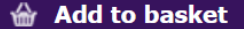
https://www.cipfa.org/examproducts/c/cipfa-portfolio-pep-submission

CIPFA Portfolio (PEP) Submission

Summary

The CIPFA portfolio is the final element of the Professional Qualification.

Portfolios can be submitted at any time of year upon completion of all required examinations. Outcomes of the review are emailed within 4 weeks of the submission. If the Portfolio is reviewed as 'complete', the email will contain an invitation to apply for PQ membership.

If your organisation requires a purchase order number, please have it ready before proceeding.

FORMAT

PUBLISHED

AUTHOR

£200.00 EXCL VAT

Add to basket

Submission of your Portfolio has a cost of £200

Once submitted you will receive the results within 4 weeks.

Appendices

Build relationships	Build trusted and sustainable relationships with individuals and organisations. Consistently support individuals and collaborate to achieve results as part of a team.
Business insight	Influence the impact of business decisions on relevant and affected communities based on an appreciation of different organisations and the environments in which they operate.
Communication	Communicate in a clear, articulate and appropriate manner. Adapt communications to suit different situations, individuals or teams.
Leadership	Take ownership of allocated projects and effectively manage their own time and the time of others. Demonstrate good project management skills to deliver high quality work within the appropriate timeline. Act as a role model and motivate others to deliver results.
Problem solving and decision making	Evaluate information quickly and draw accurate conclusions. Assess a problem from multiple angles to ensure all relevant issues are considered. Gather the appropriate facts and evidence in order to make decisions effectively.
Adds value	Anticipate an individual's / organisations future needs and requirements. Identify opportunities that can add value for the individual / organisation.
Continuous improvement	Take responsibility for their own professional development by seeking out opportunities that enhance their knowledge, skills and experience.
Ethics and integrity	Identify ethical dilemmas, understand the implications and behave appropriately. Understand their legal responsibilities, both within the letter and the spirit of the law, as well as be aware of the procedures for reporting concerns over potentially unethical activities.
Flexibility	Adapt approach to assist organisations and individuals to manage their conflicting priorities as circumstances change.
Professional scepticism	Apply a questioning mind to conditions which may indicate a possible misstatement of financial information due to error or fraud.

10 Skills and Behaviours

Planning, Forecasting, budgeting

- Contribute to the generation of options for organisational or departmental strategy
- Assess the feasibility of the identified options, using financial and non-financial
- Formulate SMART business plan objectives
- Monitor performance against business plan objectives

Strategic financial management

- Prepare a trial balance
- Prepare a selection of external financial statements for an organisation
- Contribute to the management of cash balances

Financial, management, sustainability and performance reporting

- Advise budget holders of variances against budget
- Advise budget holders of variances against budget
- Budget preparation

Audit, Governance and internal control

- Assist in a Value for Money audit by, for example, benchmarking the audited service
- Audit planning for an internal or external audit
- Draft the report of an audit including conclusions and recommendations
- Undertake an audit of a non-financial system or service
- Organisational values or culture
- Contribute to an evaluation of an organisation's systems of internal control
- Governance frameworks

Transformation, risk, and project management

- Analyse and quantify the risks associated with a proposed service or activity within an organisation
- Risk and risk management

Areas of Technical Competencies