

Project Management Degree Apprenticeship (PMDA)

Portfolio Guide

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1. Introduction

Throughout your Apprenticeship you will be building your portfolio that will be used as a reference point during End Point Assessment.

This guide is designed to help you understand how to build your portfolio effectively and identify the Knowledge, Skills and Behaviours (KSBs) you need to meet.

Your Digital Learning Consultant (DLC) will be adding 'Portfolio Checkpoints' to your learning plan on Bud and before gateway your portfolio will be consolidated into the best examples of how you have applied your Project Management knowledge, skills and behaviours in the workplace.

You will receive ongoing guidance and feedback from your DLC, and you can also access additional support and resources through Canvas and the ACE team.

Every apprentice and employer is unique, so this guide may not align perfectly with your specific role, responsibilities or experience.

Please note that your portfolio is not a graded assessment in itself, however, it is used during the End-Point Assessment (EPA) and is one of the gateway requirements to progress to EPA. It is therefore important that the information and examples you provide are specific to work you have personally completed. Your DLC will be able to support you with this.

2. Portfolio Guidance

As an apprentice on the Project Management Degree Apprenticeship, it's important that your portfolio demonstrates your professional competence by presenting your work in a clear, polished and industry-standard format.

You can create the main body of your portfolio using standard word-processing software, and it should be submitted as either a Microsoft Word document or a PDF. If needed, you may include up to four additional files in other formats to support your evidence. If you feel you need to add supplementary files, please speak with your DLC for guidance.

2.1. How to Approach Your Portfolio

Your portfolio should showcase real workplace examples that demonstrate how you have applied your learning on the job. This means that evidence from online learning, academic exercises, live events, personal projects, enrichment activities, or hobbies must not be included. All portfolio content must relate directly to the business needs of your employer and reflect genuine workplace activity. Tasks should not be created solely to meet assessment criteria without providing real value to the organisation.

To ensure your day-to-day work aligns with the requirements of each apprenticeship unit and the deadlines on Bud, speak regularly with your line manager and your DLC. Your DLC can



provide details of the topics covered in each unit to help you and your manager plan suitable work activities.

When preparing your portfolio, remember that your end-point assessor will be a Project Management specialist. You do not need to explain basic Project Management concepts; instead, focus on clearly demonstrating how you applied your knowledge in practice. However, the assessor may not be familiar with the specific terminology used in your organisation or industry. Always write out acronyms in full the first time you use them. If you work in a highly technical environment—such as finance, legal, engineering or science—you may also find it helpful to include a glossary of terms to support the assessor’s understanding.

2.2. Narration Style

The writing style used in your portfolio may differ from what you are used to. Your portfolio should always be written in first-person and in the past tense. This means using phrases such as *“I completed...”*, *“I analysed...”*, or *“I created...”*. Your evidence must describe what you have done, not what you might do in the future, so avoid speculative statements like *“I could...”* or *“I would...”*.

You should also avoid general statements about how your organisation or team operates, such as *“we do this”* or *“we handle that”*. Your end-point assessor needs to clearly understand your individual contribution, not the actions of your wider team. If you use *“we,”* the assessor may assume you are referring to team-based work rather than your own actions.

Remember: the assessor is evaluating your personal performance and development, not that of your team or organisation.

2.3. Hints and Tips

It is important to avoid including certain types of information in your portfolio, as they may raise concerns for your end-point assessor around authenticity, professionalism, GDPR, or Data Protection.

Do not include any of the following:

- Names of people who are not yourself or your line manager
- When referring to colleagues on your team or within your organisation, use job titles and/or initials only
- References to QA activity names and numbers
- Examples: *“A2.3”*, *“Apply”*, or *“Workplace”* in your section headings or within the text, unless it is within the context of tasks set by your organisation
- QA branded documents
- Links to external resources or company websites. The assessor will not follow external links to other sources. If you believe the content is relevant, it should be included in your portfolio as a summary in your own words
- Negative comments
- Do not criticise others or their work in your portfolio, this is viewed as unprofessional
- Excessive details about you or others

Your assessor's priority is to understand your professional capabilities and competence. Ensure everything you include supports this and keeps the spotlight on your own contributions and development.

3. Portfolio Checkpoint Expectations

3.1. Portfolio Checkpoint 1

At your baseline review (within 4 weeks of 1st workshop) and first progress review (10-12 weeks after the baseline review) your DLC will be able to discuss with you both your job role and the portfolio requirements in more detail.

For your first checkpoint it would be great to have an understanding of yourself and your job role.

Things to consider:

- Title Page
- Overview of your role
- Overview of your company

3.2. Portfolio Checkpoint 2

For your second checkpoint you should be able to start evidencing KSB's that you are demonstrating in your role.

The KSB's that you can include will be dependant on the work you are completing in your role and the types of projects you are working on.

The important thing here is not to worry if you are not following the guide below exactly – remember every role is different and your DLC will be able to guide you on which KSB's relate to the work you are doing.

As you complete work towards your portfolio you can use your DLCs feedback to record the KSBs you have successfully covered below.

While you are still on the programme, you can continue to update your portfolio by adding further examples in these areas and/or refining the evidence you have already provided, particularly if you have more detailed projects or examples to include.

3.3. Ongoing Portfolio Checkpoints

Your DLC will set the Portfolio Checkpoints as activities on your Bud learning plan for the duration of your Apprenticeship. It is important you are updating and adding evidence to your portfolio on an ongoing basis to aid successful timely completion.

4. Use of Artificial Intelligence in relation to Portfolio

4.1. Assessment Integrity

All apprentices are expected to act with integrity - a commitment to ethical, honest and fair practice - in their study. This means that the work that you submit for any activities/assessments must be your own. Any part of work that is created by others, including AI generated content, must be fully acknowledged and referenced. It is good practice to treat any response generated through AI as a potentially unreliable source, so you should verify the accuracy of any information provided

For this reason, AI-generated outputs should not be used as primary sources of information in conducting assessments. AI tools might, for example, be used to assist with generating ideas, researching topics, or planning a piece of work, ensuring that any elements that are AI generated (such as an image or data set) included in assessments are referenced appropriately.

If you have doubts regarding the acceptable use of AI for a specific assessment, then please discuss this with your Digital Learning Consultant and/or module tutor.

4.2. Conducting Assessments

When preparing work for your apprenticeship programme you should always ensure that you are accurately representing who created it. All work that you submit is assumed to be presented as your own, i.e. created entirely by you, unless otherwise stated.

Failing to declare where parts or the whole of work submitted has been created by someone or something else could be classed as Academic or Assessment Misconduct, where the penalty or consequence may vary by programme depending on the specific regulations in place.

Submitting work for End Point Assessment (EPA) that is represented as your own but has been generated by Generative AI tools and not appropriately referenced could result in the failure of that assessment. Guidance from the Institute for Apprenticeships and Technical Education on End Point Assessments states that:

- “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

Learners found on breach of the above areas will be subject to potential penalties as per the QA AI Policy, Disciplinary & Appeals Policy and/or connected organisation policies.

The tables below outline all standard criteria for the portfolio, related to the academic modules. Each standard includes a reference code (e.g., KAx, Sx, or BAx), which corresponds to the pass or distinction requirements detailed in the rubric table.

5. Portfolio Reference

Module Title: 5.1 Sourcing & Sustaining Project Resources			
Standards	Standard Description	Location within portfolio	Portfolio Checkpoint Date
K1. Governance and Financial Control of Projects (KA1)	1.1 How to evaluate and establish appropriate project governance through the incorporation of policies, regulations, processes, roles and structures in different project types and organisational structures, accepting that different sizes of organisation require different levels of control. 1.2 How to manage project budgets and costs within appropriate financial frameworks and how to report project performance, tailoring reporting requirements to comply with governance norms in the business. 1.3 How to construct robust project business cases that demonstrate the benefits and value expected from project deliverables.		
K8. Procurement and Contract Management (KA1)	8.1 How to procure goods and services in a cost effective, process driven manner. 8.2 How to manage projects within commercial and contractual policies, practices and relationships. 8.3 The importance of supply chain management in a project environment. 8.4 How to manage the procurement cycle and identify opportunities for maximising benefits through the effective establishment and management of contracts. This may include the relevance of sustainable procurement and supply chains and their wider impact on their immediate cost taking a lifecycle approach to establishing cost and value.		
K9. Risk Management (KA1)	9.1 How to apply methodologies for risk evaluation and management. 9.2 How to mitigate the impact of risks on project performance in terms of schedule, cost and quality. This may include risks to sustainability and the environment.		
B2. Collaboration and teamwork (BA1)	2.1 Work collaboratively to build rapport and trust, develop networks and maintain relationships. 2.2 Build and inspire teams, empower and motivate others to improve performance and achieve outcomes. 2.3 Delegate tasks, set goals and accountabilities, provide clear guidance and monitor progress.		

Rubric			
Knowledge / Skill / Behaviour	Fail	Pass	Distinction
KA1	Apprentice has not met the pass criteria.	Apprentice documents and recommends appropriate project management solutions in the areas of project governance, business case development and project justification, communication plans, schedule development, project quality, procurement, risk management and project change control.	Apprentice investigates innovative project management tools and techniques and evaluates their suitability for use within the context of their project environment. Apprentice takes a leadership role in justifying the use of such tools and techniques and supporting the organisation in achieving benefit from using them.
BA1	Apprentice has not met the pass criteria.	Apprentice demonstrates that they can take a leadership role in a project environment with the ability to motivate all team members to achieve project results. Apprentice responds positively and proactively to feedback on performance and works proactively to analyse problems and develop solutions, taking into account the views of stakeholders and team members.	Apprentice recommends appropriate improvements to enhance team performance. Apprentice evaluates, recommends and implements solutions to complex problems arising in a project environment.

Module Title: 5.2 Project Governance & Financial Control			
Standards	Standard Description	Location within portfolio	Portfolio Checkpoint Date
K1. Governance and Financial Control of Projects (KA1)	1.1 How to evaluate and establish appropriate project governance through the incorporation of policies, regulations, processes, roles and structures in different project types and organisational structures, accepting that different sizes of organisation require different levels of control. 1.2 How to manage project budgets and costs within appropriate financial frameworks and how to report project performance, tailoring reporting requirements to comply with governance norms in the business. 1.3 How to construct robust project business cases that demonstrate the benefits and value expected from project deliverables.		
K5. Estimating, Planning and Scheduling (KA1)	5.1 How to develop and manage projects within different planning frameworks to balance the fundamental components of the project. 5.2 How to prepare and maintain resourced project schedules and use these for project monitoring, control and delivery. 5.3 How to analyse schedule integrity, dependencies and their implications.		
K6. Project Justification (KA1)	6.1 How to interpret organisational and programme aims and objectives to develop robust business plans and the requirement to revisit such plans at key stages of a project to ensure ongoing viability of the business case. 6.2 The identification of realistic benefits, both tangible and intangible, and an appreciation of how these might be delivered.		
K7. Quality Management (KA1)	7.1 How to apply quality management frameworks and monitor their impact in a project environment. 7.2 How to deliver quality within a project environment including assurance, control and continuous improvement of deliverables, processes and procedures.		
K10. Project Change Control (KA1)	10.1 How to apply the concepts of project change control. 10.2 How to define and use appropriate processes and tools to manage scope, requirements, benefits and success factors of a project. 10.3 How to analyse the impacts and interdependencies of changes on the project and its deliverables.		

Rubric			
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Module Title: 5.3 Engaging Stakeholders through Technology Driven Approaches			
Standards	Standard Description	Location within portfolio	Portfolio Checkpoint Date
K3. Stakeholder and Communications Management (KA1)	3.1 How to communicate effectively with internal and external stakeholders to build and maintain their support for successful project outcomes. 3.2 How to manage the dynamics of stakeholder relationships and needs during the project and develop appropriate and pro-active project communication plans to ensure that all of the multi-skilled, cross-disciplinary stakeholders are aligned.		
S3. Stakeholder and Communications Management (SA3)	3.1 Lead and take responsibility for the identification and analysis of internal and external stakeholders and their impact on the project. 3.2 Manage an effective project communication plan across stakeholders with different cultural and physical barriers. 3.3 Analyse information and communicate with stakeholders incorporating elements of feedback to understand and measure the effectiveness of planned communications. 3.4 Effectively listen and influence others through negotiation and persuasion.		
B2. Collaboration and teamwork (BA1)	2.1 Work collaboratively to build rapport and trust, develop networks and maintain relationships. 2.2 Build and inspire teams, empower and motivate others to improve performance and achieve outcomes. 2.3 Delegate tasks, set goals and accountabilities, provide clear guidance and monitor progress.		
B5. Inclusive (BA1)	5.1 Be open, approachable and authentic and able to build and maintain trust with others. 5.2 Actively seek the views of others and value diversity internally and externally.		
B6. Innovation and Resourcefulness (BA1)	6.1 Understand the bigger picture and work enthusiastically and creatively to analyse problems and develop innovative and workable solutions to problems. 6.2 Have a solution focus, not a problem focus and to be positive and adaptable, responding well to feedback and the need for change.		

Rubric			
Knowledge / Skill / Behaviour	Fail	Pass	Distinction
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SA3	Apprentice has not met the pass criteria.	Apprentice demonstrates that they can analyse and assess stakeholder requirements. Apprentice communicates appropriately with a range of project stakeholders.	Apprentice analyses and recommends improvements to stakeholder communications in order to improve project outcomes and facilitate benefits realisation.
BA1	Apprentice has not met the pass criteria.	Apprentice demonstrates that they can take a leadership role in a project environment with the ability to motivate all team members to achieve project results. Apprentice responds positively and proactively to feedback on performance and works proactively to analyse problems and develop solutions, taking into account the views of stakeholders and team members.	Apprentice recommends appropriate improvements to enhance team performance. Apprentice evaluates, recommends and implements solutions to complex problems arising in a project environment

Module Title: 5.4 Pathway Option - Project Methodologies & Professional Practice, IT Project Management, Infrastructure Project Management or Public Sector Project Management

Standards	Standard Description	Location within portfolio	Portfolio Checkpoint Date
K1. Governance and Financial Control of Projects (KA1)	1.1 How to evaluate and establish appropriate project governance through the incorporation of policies, regulations, processes, roles and structures in different project types and organisational structures, accepting that different sizes of organisation require different levels of control. 1.2 How to manage project budgets and costs within appropriate financial frameworks and how to report project performance, tailoring reporting requirements to comply with governance norms in the business. 1.3 How to construct robust project business cases that demonstrate the benefits and value expected from project deliverables.		
B6. Innovation and Resourcefulness (BA1)	6.1 Understand the bigger picture and work enthusiastically and creatively to analyse problems and develop innovative and workable solutions to problems. 6.2 Have a solution focus, not a problem focus and to be positive and adaptable, responding well to feedback and the need for change.		

Rubric			
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BA1	Apprentice has not met the pass criteria.	Apprentice demonstrates that they can take a leadership role in a project environment with the ability to motivate all team members to achieve project results. Apprentice responds positively and proactively to feedback on performance and works proactively to analyse problems and develop solutions, taking into account the views of stakeholders and team members.	Apprentice recommends appropriate improvements to enhance team performance. Apprentice evaluates, recommends and implements solutions to complex problems arising in a project environment

Module Title: 6.1 Leading Change through Emerging Technologies and Approaches			
Standards	Standard Description	Location within portfolio	Portfolio Checkpoint Date
K2. The Business Environment (KA1)	2.1 How projects contribute to businesses operating in local, regional, national and global economies. 2.2 Knowledge of the main UK business sectors and the parameters within which they operate.		
B1. Leadership (BA1)	1.1 Drive for results with the ability to inspire and support project team members and manage stakeholder relationships. 1.2 Promote the vision, organisational/project purpose and values. 1.3 Understand and create the environment for an inclusive and diverse organisational culture.		
B2. Collaboration and teamwork (BA1)	2.1 Work collaboratively to build rapport and trust, develop networks and maintain relationships. 2.2 Build and inspire teams, empower and motivate others to improve performance and achieve outcomes. 2.3 Delegate tasks, set goals and accountabilities, provide clear guidance and monitor progress.		
B5. Inclusive (BA1)	5.1 Be open, approachable and authentic and able to build and maintain trust with others. 5.2 Actively seek the views of others and value diversity internally and externally.		
B6. Innovation and Resourcefulness (BA1)	6.1 Understand the bigger picture and work enthusiastically and creatively to analyse problems and develop innovative and workable solutions to problems. 6.2 Have a solution focus, not a problem focus and to be positive and adaptable, responding well to feedback and the need for change.		

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BA1	Apprentice has not met the pass criteria.	Apprentice demonstrates that they can take a leadership role in a project environment with the ability to motivate all team members to achieve project results. Apprentice responds positively and proactively to feedback on performance and works proactively to analyse problems and develop solutions, taking into account the views of stakeholders and team members.	Apprentice recommends appropriate improvements to enhance team performance. Apprentice evaluates, recommends and implements solutions to complex problems arising in a project environment

Module Title: 6.2 Sustainable Strategy in the Business Environment			
Standards	Standard Description	Location within portfolio	Portfolio Checkpoint Date
K2. The Business Environment (KA1)	2.1 How projects contribute to businesses operating in local, regional, national and global economies. 2.2 Knowledge of the main UK business sectors and the parameters within which they operate.		
S2. The Business Environment (SA2)	2.1 Identify and analyse the context, opportunities and challenges presented by projects in a range of organisational settings, appreciating the differences within both large and small organisations and in different industry sectors and the consequent need for tailoring. 2.2 Identify the operating constraints that apply to projects including ethical, legal and regulatory considerations.		
B6. Innovation and Resourcefulness (BA1)	6.1 Understand the bigger picture and work enthusiastically and creatively to analyse problems and develop innovative and workable solutions to problems. 6.2 Have a solution focus, not a problem focus and to be positive and adaptable, responding well to feedback and the need for change.		

Rubric			
Knowledge / Skill / Behaviour	Fail	Pass	Distinction
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SA2	Apprentice has not met the pass criteria.	Apprentice demonstrates that they can analyse and assess the business context of projects and make recommendations suitable for inclusion in development and maintenance of a robust project business case.	Apprentice analyses and assesses a project business case against recognised standards and guidance. Apprentice, evaluates and predicts project outcomes and identifies opportunity for improvements to the business case.
BA1	Apprentice has not met the pass criteria.	Apprentice demonstrates that they can take a leadership role in a project environment with the ability to motivate all team members to achieve project results. Apprentice responds positively and proactively to feedback on performance and works proactively to analyse problems and develop solutions, taking into account the views of stakeholders and team members.	Apprentice recommends appropriate improvements to enhance team performance. Apprentice evaluates, recommends and implements solutions to complex problems arising in a project environment



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