



# Introduction to PEP (Professional Experience Portfolio)

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## Requirements

- Minimum of 400 days of **relevant** workplace experience
- 3 Evidenced activities (must include oral presentation)
- General Reflection & Learning
- CPD Learning & Development Plan

Only submit once you have **passed** your final exams



## Work Experience

- Log a minimum of 400 days (excludes college/leave)
- 8 competency areas (Appendix A):
  - Leadership & Strategic Management
  - Strategic & Operational Financial Management
  - Financial & Performance Reporting
  - Governance, Ethics & Values
  - Audit & Accountability
  - Partnerships & Stakeholder Relations
  - Change, Risk & Project Management
  - Procurement & Contract Management
- Employers required to verify experience

# Work Experience: Summary Sheet

Candidate's name:	
Student number:	
Employing organisation:	

**Summary:**

Statement of Expertise area	Total number of days in this area	Employer's signature
Leadership & Strategic Management		
Strategic & Operational Financial Management		
Financial & Performance Reporting		
Governance, Ethics & Values		
Audit & Accountability		
Partnerships & Stakeholder Relations		
Change, Risk & Project Management		
Procurement & Contract Management		

## Work Experience: Detailed Log

Dates	Description of workplace experience	Statement of Expertise area	What has been learned and how may it be used? Outcome of learning and future application	Number of days	Employer's signature
Jan 12– Feb 12	Compilation of a contracts & tenders register for Environment & Leisure	Procurement & Contract Management	This has given me an understanding of how the tendering process works, and the rules and procedures have been followed. I will use this in the future to portray openness and transparency in order to prevent accusations of fraud.	25	
June 12 – Sept 12	Payment of invoices	Strategic & Operational Financial Management	I learnt how to follow through the entire payments process order of receiving a goods receipt note, to finally make a payment. This enhanced my understanding of how the procurement process works.	20	

## Evidenced Activities

- 3 Professional Level activities  
(From different competency areas – **Appendix 1** on pages 26-28)
- 1 of the 3 activities **must include** an oral presentation in the planning & execution of activity
- Students required to write about each activity:

### **Include:**

- Cover Sheet
- Employer Validation form

### **Sections** (for each activity):

- Planning and Execution
- Evidence
- Ethical Considerations
- Learning

# Evidenced Activities: Summary Sheet

Candidate's full name:	
Manager's full name:	
Manager's job title:	
Employing organisation:	
Title of evidenced activity:	
Level of activity:	
Date activity completed:	
Role played by candidate in that activity:	



# Evidenced Activities: Summary Sheet

Nature of activity:
Role of the candidate in the activity:
Outcome of activity:
Report on the completion of the activity:

Manager's signature	Date
Candidate's signature	Date

# Evidenced Activities: Planning & Execution

- Why you chose this activity
- How you went about planning the activity and how you took into account the type of evidence you would need for your portfolio
- What were the main objectives of the activity?
- Timescales and resources needed for the activity?
- Any barriers or risks to success of the activity?

## Evidenced Activities: Evidence

- Provide 2-3 items of evidence for each activity; one of which will be the employer's validation report
- Include an additional piece of evidence for the activity containing your oral presentation
- **Examples:** written reports & papers, emails from managers & colleagues, appraisal forms, feedback forms, PowerPoint slides etc.

Appendix	Evidence	Page number
2.2a – my role	Agenda – for the meeting which includes my presentation s as the first item.	52
2.2b – 2.2c – it happened, outcome	Feedback from all the attendees	53-55

## Evidenced Activity: Ethical Considerations

- Importance of ethics should not be underestimated
- What ethical principles, professional values or attitudes were applied in the activity
- What threats and safeguards were implemented?
- How you could behave more ethically or professionally in the future
- **Relate to the five principles**
  - Integrity
  - Objectivity
  - Professional Competence & Due Care
  - Confidentiality
  - Professional Behaviour

**Encourages good habits and best practice**

## Evidenced Activity: Learning

- Reflect on how well you applied knowledge and skills to the activity
- Have you learned anything new?
- How it might influence future work & performance
- How you will apply the learning in the future and your professional development?
- Whether the reflection has helped identify other learning and development needs?

## Evidenced Activity: Oral Presentation

- Required as part of at least one of the evidenced activities
- Present in a reasonable formal work setting within a professional environment
- An audience of at least 3 people
- Evidence should confirm your role in the presentation
  - Slides
  - Meeting Minutes/Agenda
  - Formal feedback forms

## General Reflection & Learning

- Review your entire training programme
- Open
- Honest
- Enjoyable moments
- Upsetting moments
- Achievements
- Failures
- Resist temptation to insult colleagues

## General Reflection & Learning

- Identify future learning goals, both short & long-term
- 'Learning' section of activities should identify these
- Prioritise the future goals and set deadlines
- Identify goals to be met in first year of CPD
- Explain why each goal is important to your development

Summary of future learning goals			
Development Needs (Learning Goals)	CPD Activities (Action to be taken to meet goal)	Time Frame	Evidence that goal has been achieved
Maintain an understanding of the issues affecting the public sector	Reading public finance regularly Attending update courses on current events (at least 2 per year)	By 30 June 20XX	Contribution to strategic planning Certificates of attendance
Develop my technical skills in Excel, Word, PowerPoint, and in SAP	Attending training courses Practising and exploring software	By 01 Nov 20XX	Certificates of attendance Feedback from managers on my performance and effectiveness



## PEP Submission & Review

- 2 copies – 1 for CIPFA and **1 for yourself**
- Include the PEP submission form (on website)
- Purchase PEP submission on CIPFA's website
- Spiral or comb-bound documents
- Send copies via secure, recorded delivery to the CIPFA Student Support team
- No set submission deadlines - submit at **any** time after **passing** all required exams
- Outcome either 'complete' or 'incomplete'
- PEP 'Scoring Criteria' on pages 21-24 of guidance

# Support

## **Student Support**

**T** 020 7543 5600

**E** [studentsupport@cipfa.org](mailto:studentsupport@cipfa.org)

## **Taught Courses at CETC**

**T** 020 7543 5600

**E** [cetc@cipfa.org](mailto:cetc@cipfa.org)