



**Institute of Commissioning Professionals**

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# **PRACTITIONER LEARNING PORTFOLIO**

A Guide for Participants

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## **Introduction**

The purpose of the Practitioner Learning Portfolio (PLP) is to enable you to demonstrate your professional competence by relating your experience within commissioning to the National Occupational Standards for Commissioning (NOS).

Completing this portfolio of evidence gives you the opportunity to show how you have developed your skills and knowledge and how you are able to operate and/or manage more effectively by reflecting on your own, and your organisation's practice.

This handbook addresses the questions that will be uppermost in your mind: what do I have to do to successfully submit the portfolio and how do I do it?

## **What do I have to do?**

Quite simply, you must present a portfolio of evidence that demonstrates that you are able to achieve the outcomes specified in the NOS and thus gain your qualification as a Commissioning professional.

As you will be aware, the NOS contain four major headings

- A. Engage with service users
- B. Assess the needs and required outcomes of services
- C. Develop commissioning policies and strategies
- D. Specify and award contracts for services

The elements of the major areas are;

- A1 – Engagement with service users;
- B1 – Assessing the needs and required outcomes of the service;
- B2 – Review and Evaluate Current Service provision;
- C1 - Developing Commissioning policies and strategies;
- C2 - Developing Plans for Services;
- C3 - Working with Providers to develop the market;
- D1 - Specifying and awarding contracts for services;
- D2 – Managing service provider performance;
- D3 – Working with service providers to maximise and enhance service provision;
- D4 – Managing the conclusion of service provision.

You will need to develop and submit four portfolios, one for each of the major areas chosen from each element. To clarify, we expect to see submissions for A,,B, C and D. So as an example, a submission may be for A1, B2, C2 and D3. Which you submit is your choice. This will help to provide focused personal development and allow some commissioners to broaden and extend their skills.

You may work on all four of these at the same time and make a single submission that deals with the whole of the NOS, **or** you may choose to “stage” your work and submit one, two or three sections at a time, so long as you remain within your maximum student registration period of two years. If you decide to submit your work in stages, you may tackle the sections in any order.

Within headings B, C and D of the NOS there are subsections and in every case there are lengthy lists of

- skills (performance criteria),
- knowledge and understanding, and
- behaviours.

You are required to demonstrate these outcomes in order to show that you have met the NOS and are a competent, professional Commissioner.

Each portfolio must contain a report showing how you meet the different elements that go to make up the NOS. Although there are long lists of requirements within the NOS, you do not have to write a separate report for each item. It is perfectly possible that one example from your workplace will provide the opportunity to satisfy several items in the NOS. It is acceptable that you integrate these items within a single report. Not only will this be acceptable from the point of view of gaining the qualification, it is likely to reflect the practical nature of your work, where many different objectives are pursued simultaneously. The only condition attached to integrated approach is that you must indicate to the assessor exactly which outcomes are being addressed in the report,

In addition to writing the factual report on activities you have experienced, you are also required to provide a reflective summary of your learning and achievement in the area. To do this you should think about your actions (or the actions of other people you work with in your organisation), reflect on the things that have gone well, and those where there is room for improvement and write about the lessons you have learned for your own future practice, or recommendations you would make to others in a similar situation.

Thus your portfolio should comprise

- A series of reports
- A series of reflective statements
- Any evidence you wish to submit in support of your reports. Evidence may be in the form of internal reports, memos, spreadsheets, or copies of e-mail correspondence, etc.

For your reference the full NOS are included as Appendix 1 within this handbook.

## **Practitioner and Reflective Learning**

There are different types of learning. Sometimes learning is about your ability to recall and repeat information. Traditional exam systems often test this type of learning. Practitioner learning is different. It puts the emphasis on acquiring skills rather than simply accumulating knowledge. This is not to say that you don't need

knowledge, but it is what you do with the knowledge that is important. The key lies in applying knowledge effectively and there are range of skills that enable you to do this. These skills can then be used in a variety of situations. By learning to understand and interpret situations you will be able to apply new knowledge and skills in a range of practical situations. This type of learning helps you become more effective.

In order to complete the portfolio you may have to add to your knowledge, or refresh your memory in some areas and you can find a reading list in Appendix 3. How much work you need to do in this area will depend on your current and previous experience. You should give some honest thought to assessing how much time and effort you need to give to enhancing your theoretical knowledge as part of your professional development process. Attendance at courses and conferences may also be a source of additional knowledge and updating. The ability to apply models and theories from textbooks to messy, complex real-world problems is not easy. Most people find this difficult however, like most skills, it is something than can be learned.

## **Achieving the Outcomes:**

The outcomes (or competencies) that you have to demonstrate in your portfolio are often expressed in personal terms but are closely related to organisational outcomes - the way your organisation goes about Commissioning.

Personal outcomes are how you have developed, improved or altered the way you do your job. Organisational outcomes reflect a change in policy or procedure at a wider level. Which type you identify and include in your portfolio will depend largely on your own experience and goals for embarking on this qualification.

All outcomes must be underpinned by appropriate evidence of good practice in commissioning relating to the skills/ techniques/ problem/ issue or area of your organisational experience.

The first step in engaging with your practitioner learning involves taking a bit of time to think about what you need to be able to do better and what you should aim to develop or improve.

One of the essential characteristics of practitioner learning is that one size doesn't fit all. So, wherever you are now in your work and career, and whatever you want to achieve, your PLP should be exactly that: *yours*. It should be tailored to meet your needs and reflect your unique blend of knowledge, skills and experience. Your focus should be on the sort of things that will make a difference to your performance at work and allow you to make a difference to your organisation.

There are a variety of sources to help you make sense of where you are now, and where you want or need to go in terms of your personal and professional development within commissioning

These include your own personal aspirations, talking to and gaining feedback from managers and colleagues, and identifying employer expectations and those of your profession.

You may have already set out some goals and objectives in your formal performance review/appraisal or have discussed areas for improvement with your manager. If so, that is a useful starting point and you can use these to help you complete your Practitioner Learning Plan.

## Executing the Plan

After you have thought about the outcomes there are three main areas that you need to focus on to as you continue to build your portfolio.

### 1 The Report

The written report should present your portfolio of evidence in a format that anyone can read and understand what has been done, what you've discovered and what you think should be done next.

Before writing the report you need to plan how you will structure the report.

The introduction should identify which learning outcomes you are dealing with and how you will demonstrate your competence.

The report should use your experience of commissioning as a framework around which to explain or highlight your competence. You are aiming to prove that your practice meets the NOS and you should identify the evidence in your portfolio that supports your case.

The report should be focussed on the topic you've selected and not simply be a diary of events. The example that you use should be clear, relevant and complete. Any discrepancies should be explained. Any reading references or literature that you have used should be relevant and summarised.

Professional structure, layout and presentation are important.

Your conclusion should contain a summary of your experience and might indicate what, if anything, should be done next. It should prove that you've done what you set out to do in your introduction. (**Hint** : writing your conclusion before your main argument might help you focus in the main body of your report.)

## 2 Reflective Commentary

The purpose of the reflection is to review what you have learned in the course of preparing the portfolio.

Because this is a formal part of the PLP you should develop the habit of reflecting as you go through the process of compiling your portfolio.

It is important to use the reflective diary to record positive experiences and achievements and the not so positive ones. A balanced view of what has taken place is essential.

Over time, you can review your reflective comments and see the progress that you have made. One advantage of recording information at regular intervals is that the steps of progress can be seen more clearly than if it is recorded over a longer period. Otherwise, you will forget what you did and how you felt as the memories become mixed.

One of the key factors in reflection is time. You must make time for reflection so that it becomes part of your way of working. Don't wait to find time. It probably won't happen.

It is important to understand that you will also need time to develop this skill. It is not a process that can be rushed, but neither is it a process that has to occur at a particular time..

It may be a good idea to sum up each day with a reflective comment in a diary, spending only a few minutes doing it. This prevents it from becoming a chore and you are more likely to gain the maximum benefit from the experience.

Reflection is not an 'add-on' piece to your learning process. It is integral to the complex process of learning and continuous improvement.

Remember that the aim is to reflect on your practice. Asking yourself questions may help you to become a more reflective practitioner.

Some examples of reflective questions are shown below

<p>What was I aiming for when I did that? What exactly did I do? Why did I choose that particular action? What was I trying to achieve? How successful was it? What criteria am I using to judge success? What did I do next? What alternatives were there? Could I have dealt with the situation any better? How would I do it differently next time?</p>	<p>What do I feel about the whole experience? What knowledge/values/skills were demonstrated? How did the client feel about it? How do I know the client felt like that? What sense can I make of this in the light of my past experience? Has this changed the way in which I will do things in the future?</p>
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### **3 Evidence**

In writing your reports and reflective statements you are likely to want to refer to other documents that you have used at work. The type of evidence that you might want to refer to will be different based on the outcomes you are demonstrating. The evidence may take the form of copies of emails or reports that you have written in your workplace. It may be that you want to refer to documents that others in the organisation have written because you have chosen to comment on their value (or because you want to improve upon them). It is acceptable for you to include documents written by others but before you take a copy of anything from your workplace it must be agreed with your employer. Confidentiality can be assured between you, your organisation and the Institute of Commissioning Professionals but permission is vital. You must also make it clear, through proper referencing, that this is not your own work.

Data can be gathered in a variety of formats but may only be presented within your portfolio i.e. there must be no additional files attached to your portfolio.

#### **Using theory and related reading**

It is expected that you will be reading around the subject whilst you are working towards your qualification. We recommend that you use a range of professional publications, academic journals, websites and books. The aim of the IoCP is to improve practice within the profession and your ability to relate theory to your working environment is a vital part of this process. For example, you could be considering the extent to which the models and frameworks apply to your situation. Have other studies have been done in this area? Are there best practice guides that could assist your organisation?

By reading a range of books and journals you will be able to extend your knowledge, develop your skills and improve your work.

You aren't expected to read an entire textbook from cover to cover and repeat its contents. One of the skills you should be looking to develop is ability to select pertinent information from a large volume of data.

The best place to start in a text book is either the table of contents at the start or the index at the end of the book. Keep uppermost in your mind the learning outcome that are you working on and search for relevant information.

As you begin to read, textbooks and journals will reference other authors. If this area seems useful to you then try to track down the item referenced. It may be in your library or the article may be in an on-line databases.

Not everything will be useful. As you move through the different authors you will find authors who support your argument. It is likely that they have written other articles in the same area.

### **How to Use what you've Read**

For each article selected, and for your own future reference when you write your portfolio, try to summarise the content in a few words. What are the key points? This process will help you identify the key issues and then in your reflection on the work issue you are studying you'll be able to use some of this to make sense of the complex environment in which you work. This will also help you condense the information in a form you can use rather than simply quoting chunks of a textbook.

Take note of diagrams that you think you could use or any short quotes that you think might be useful when you come to write your report.

Make time to write up what you've found and keep the full reference for your bibliography.

Revisit the books and articles as you work through the evidence gathering period. As you reflect and experiment, you may find that some parts of articles become relevant in the light of experience.

### **How many words in my portfolio?**

Your report and reflections are subject to strict word limits as shown below:-

A. Engage with service users	2000 words
B. Assess the needs and required outcomes of services	2500
C. Develop commissioning policies and strategies	2500
D. Specify and award contracts for services	2500

The evidence section of your portfolio is not subject to any word limit.

You are required to submit your portfolio both in printed hard copy, and as electronic soft copy. The soft copy must be presented as a single file, therefore any evidence that is not in Microsoft Word format must be converted or embedded within your Word file.

## Summary

Your portfolio will cover each of the Outcomes within the NOS and will include your reflections on the work you have done to complete the portfolio and what you have learnt. Summarise the activities which you undertook to demonstrate the achievement of the NOS outcomes and then discuss what you have learnt.

This should also evaluate the extent to which your professional practice has added value to you, your team or your organisation.

This reflection should be of a questioning, critical nature and should take account of how the work has been carried out to date, improvements, resourcing implications, timeframes etc associated with this. It will also include your recommendations for the future either for your own skills or relating to the organisation, for each learning outcome.

## Appendix 1: The Draft National Occupational Standards

### Draft National Occupational Standards

<p><b>Knowledge and Understanding</b></p> <p><b>A1 Engage with service users</b></p>	<p><b><i>You must have knowledge and understanding of:</i></b></p> <ol style="list-style-type: none"> <li>1. The relevant legislation in relation to the service provision with which you are concerned</li> <li>2. The ethics and requirements of sustainability as applied to the service provision with which you are concerned</li> <li>3. How to establish and implement communication strategies</li> <li>4. The service users with whom you need to engage</li> <li>5. How to collect management information in relation to service users</li> <li>6. How to engage with service users in a meaningful and mutually beneficial way</li> <li>7. The types of consultation that can be used both on an on-going basis and at specified intervals</li> <li>8. The support that some service users may require to engage and how this can be delivered</li> <li>9. The ways in which you should communicate with service users taking into account cultural, social and economic requirements</li> <li>10. The need for open and transparent relations with service users</li> <li>11. The ways in which service providers can help with service user engagement</li> </ol>
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<p><b>Knowledge and Understanding</b></p> <p><b>B1 Assess the needs and required outcomes of the service</b></p>	<p><b><i>You must have knowledge and understanding of:</i></b></p> <ol style="list-style-type: none"> <li>1. The relevant legislation in relation to the service provision with which you are concerned</li> <li>2. The ethics and requirements of sustainability as applied to the service provision with which you are concerned</li> <li>3. The political landscape with regard to commissioning in your area</li> <li>4. Current commissioning policies and strategies in your area of work</li> <li>5. How to carry out research to assess the needs and required outcomes of services</li> <li>6. The principles of evidence based validation and how to apply these principles</li> <li>7. The meaning of needs, objectives and outcomes</li> <li>8. The ways in which the policy landscape is currently changing and how this may affect service provision</li> <li>9. The principles of option appraisal</li> <li>10. The current and changing demographics and what this means for your services</li> <li>11. How to consult with service users, service providers and other stakeholders</li> <li>12. The previous and existing delivery of services in your area, including delivery performance and the interventions required to achieve strategic goals</li> <li>13. What would constitute gaps in service provision</li> <li>14. How to develop value for money objectives</li> <li>15. How to carry out a risk assessment</li> </ol>
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<p><b>Knowledge and Understanding</b></p> <p><b>B2 Review and Evaluate current service provision</b></p>	<p><i><b>You must have knowledge and understanding of:</b></i></p> <ol style="list-style-type: none"> <li>16. The relevant legislation in relation to the service provision with which you are concerned</li> <li>17. The relevant organisational requirements and expected outcomes in relation to service provision</li> <li>18. The ethics and requirements of sustainability as applied to the service provision with which you are concerned</li> <li>19. The political landscape with regard to commissioning in your area</li> <li>20. Relevant research findings in relation to the service provision with which you are concerned</li> <li>21. The use of resource mapping to inform decision making</li> <li>22. The ways in which the policy landscape is currently changing and how this may affect service provision</li> <li>23. The wider views of the public and service users in relation to service provision</li> <li>24. The approaches available for reviewing and evaluating current service provision (e.g. service user surveys, contract reviews, benchmarking)</li> <li>25. The range of providers in relation to the service provision with which you are concerned, and the potential of related providers</li> <li>26. How to report the results of your review and evaluation</li> </ol>
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<p><b>Knowledge and Understanding</b></p> <p><b>C1 Develop commissioning policies and strategies</b></p>	<p><i><b>You must have knowledge and understanding of:</b></i></p> <ol style="list-style-type: none"> <li>27. The relevant legislation in relation to the service provision with which you are concerned</li> <li>28. The relevant organisational requirements and expected outcomes in relation to service provision</li> <li>29. The ethics and requirements of sustainability as applied to the service provision with which you are concerned</li> <li>30. The need for alignment of commissioning strategies and policies with the vision of the organisation</li> <li>31. Any relevant existing policies and strategies within your organisation</li> <li>32. The quality standards applied to the delivery of services</li> <li>33. How to carry out consultations and the range of stakeholders that should be involved (including providers and service users)</li> <li>34. How policies and strategies translate into clear and achievable delivery objectives</li> <li>35. How to develop commissioning policies and strategies in consultation with stakeholders</li> <li>36. The benefits and implementation of collaborative approaches</li> <li>37. The nature of the market place for services and how policies and strategies can change the market place</li> </ol>
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<p><b>Knowledge and Understanding</b></p> <p><b>C2 Develop plans for services</b></p>	<p><b><i>You must have knowledge and understanding of:</i></b></p> <p>38. The relevant legislation in relation to the service provision with which you are concerned</p> <p>39. The relevant organisational requirements and expected outcomes in relation to service provision</p> <p>40. The ethics and requirements of sustainability as applied to the service provision with which you are concerned</p> <p>41. The principles and application of option appraisal</p> <p>42. The quality standards applied to the delivery of services</p> <p>43. How to carry out consultations and the range of stakeholders that should be involved (including providers and service users)</p> <p>44. How to develop plans for the delivery of services</p> <p>45. The principles of procurement and choosing best value for money</p> <p>46. The required content of the plans to enable implementation and delivery</p> <p>47. The costs and benefits of co-commissioning<sup>1</sup> and joint commissioning</p> <p>48. The types of complementary services that exist</p> <p>49. The use of evidence-based practice in your work</p> <p>50. The ways in which plans must be made available to relevant others</p>
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<p><b>Knowledge and Understanding</b></p> <p><b>C3 Work with Providers to develop the market</b></p>	<p><b><i>You must have knowledge and understanding of:</i></b></p> <p>51. The relevant legislation in relation to the service provision with which you are concerned</p> <p>52. The relevant organisational requirements and expected outcomes in relation to service provision</p> <p>53. The ethics and requirements of sustainability as applied to the service provision with which you are concerned</p> <p>54. The characteristics and boundaries of the market with which you are concerned</p> <p>55. Theories and concepts of market management and development</p> <p>56. The quality standards applied to the delivery of services</p> <p>57. The range of current and potential providers in relation to the service provision with which you are concerned</p> <p>58. The relevant commissioning organisations with whom you need to work</p> <p>59. How to encourage new entrants into the market</p> <p>60. How to engage and work with current and potential providers of services</p> <p>61. The types of issues and constraints with which providers may be concerned</p> <p>62. The resources and support that may be available to providers</p>
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<sup>1</sup> as in relation to micro commissioning

<p><b>Knowledge and Understanding</b></p> <p><b>D1 Specify and award contracts for services</b></p>	<p><b><i>You must have knowledge and understanding of:</i></b></p> <ol style="list-style-type: none"> <li>1. The relevant legislation in relation to the service provision with which you are concerned</li> <li>2. The ethics and requirements of sustainability as applied to the service provision with which you are concerned</li> <li>3. Organisational requirements relevant to the functions being carried out</li> <li>4. What service specifications, tender documents and contracts should contain</li> <li>5. How to develop service specifications, tender documents and contracts</li> <li>6. The use of evidence-based practice in your work</li> <li>7. Your organisation's procurement procedures</li> <li>8. The range of suitable providers and the services they provide</li> <li>9. How to select and manage service providers according to legal and organisational requirements</li> <li>10. How to evaluate the quality and cost-effectiveness of services</li> </ol>
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<p><b>Knowledge and Understanding</b></p> <p><b>D2 Manage service provider performance</b></p>	<p><b><i>You must have knowledge and understanding of:</i></b></p> <ol style="list-style-type: none"> <li>63. The relevant legislation in relation to the service provision with which you are concerned</li> <li>64. The ethics and requirements of sustainability as applied to the service provision with which you are concerned</li> <li>65. Your organisations requirements for managing service providers</li> <li>66. The ways in which service providers are involved in service delivery</li> <li>67. The content of the specification for services and how this should be implemented</li> <li>68. The service targets set in place by the specification and how these should be achieved</li> <li>69. The sources of data and information with regard to service provision and how these can be used to inform decision making</li> <li>70. How to manage service provider performance in a fair, transparent and open way</li> <li>71. The methods for obtaining feedback from service users and why this is important</li> <li>72. The approaches to assessment which may be used</li> <li>73. The use of self assessments by service providers and how these are communicated</li> <li>74. How to manage issues with performance</li> <li>75. The relationships between different service providers and how this affects service delivery</li> <li>76. The importance of keeping clear and accurate records of service provider performance and management</li> </ol>
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<p><b>Knowledge and Understanding</b></p> <p><b>D3</b></p> <p><b>Work with service providers to maximise and enhance service provision</b></p>	<p><b><i>You must have knowledge and understanding of:</i></b></p> <p>77. The relevant legislation in relation to the service provision with which you are concerned</p> <p>78. The relevant organisational requirements and expected outcomes in relation to service provision</p> <p>79. The ethics and requirements of sustainability as applied to the service provision with which you are concerned</p> <p>80. The quality standards applied to the delivery of services</p> <p>81. The use of evidence-based practice in your work</p> <p>82. How to engage with service providers</p> <p>83. How to develop service providers</p> <p>84. How to define the roles and responsibilities of service providers</p> <p>85. The purpose of a communication strategy and how to develop them</p>
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<p><b>Knowledge and Understanding</b></p> <p><b>D4</b></p> <p><b>Manage the conclusion of service provision</b></p>	<p><b><i>You must have knowledge and understanding of:</i></b></p> <p>1. The relevant legislation in relation to the service provision with which you are concerned</p> <p>2. The ethics and requirements of sustainability as applied to the service provision with which you are concerned</p> <p>3. The reasons why services may need to be brought to an end</p> <p>4. How to manage dilemmas and conflicts that can arise when bringing services to an end</p> <p>5. Key government initiatives which affect the organisational practices in relation to managing the conclusion of service provision</p> <p>6. The principles of managing the conclusion of service provision</p> <p>7. The reasons why people are reluctant to change to new services and how to address them</p> <p>8. The costs and benefits of concluding services that are no longer helping to achieve outcomes</p> <p>9. The negative effects of re-designing and changing services and why it is important to consider them</p>
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## Appendix 2 : Tips on Writing the Report

In this section we have included some simple steps you can take to make the task of completing the portfolio more manageable.

- Find the right environment to work. Find a space where you can work. Some people need complete silence to work whilst others can happily work to music or with people around.
- Manage the number of interruptions. You need to make sure you can concentrate on your thought process without someone else destroying your train of thought. If you are using a computer at home is it away from TV or do other family members want to use it
- Breaking Work Up. Writing a long report is the same. By breaking the process into smaller tasks it becomes easier to see how the whole thing can be completed.
- Reports don't have to be written in a linear fashion. It can be easier to write the introduction first, then the conclusion and fill in the main flow and logic to ensure that it is consistent.
- Writing reports is an iterative process. It is important to leave time to revise what you've done. Does it make sense? Are the sections in the right order?
- Talk through your thought process with someone not involved. It can be helpful to hear your thoughts out loud some times. You may be able to find flaws in your reasoning or areas you haven't thought about.

### The Final Report

- Before you submit your report get someone else to read it through for comment.
- Ask someone to check your spelling and grammar.
- Avoid perfectionism. It is difficult to hand over your work to someone else to be assessed. You want your work to be the best it can be but avoid the need to make it perfect.

### **Appendix 3: Further Reading**

Critical Thinking Skills by Stella Cottrell. Published by Palgrave MacMillan

The Study Skills Handbook Third Edition by Stella Cottrell. Published by Palgrave MacMillan

The Business Student's Handbook Fourth Edition by Sheila Cameron  
Published by Prentice Hall Financial Times

Effective Study Skills by Geraldine Price and Pat Maier Published by Pearson Education

Best practice procurement: public and private sector perspectives Edited A Erridge, R Fee and J McIlroy, 2001

Best value purchasing CD-Rom – a toolkit for the public sector, CIPFA

Public procurement, International Cases and Commentary Edited by Knight, L et al  
Routledge, 2007

How to Develop a Procurement Strategy: A Guide for Local Authorities (2003)  
CIPFA

World Class Procurement, Market Stimulation and Commercial Approaches to NHS  
Commissioning (2010) CIPFA

A Guide to Procuring Public Services. Second Edition. 2010. D Forbes, Barony  
Consulting Group. [www.baronyconsulting.com](http://www.baronyconsulting.com)

Others to be added.