

INITIAL PROGRESS REVIEW GUIDANCE

A how-to-use guide with top tips to help make the Initial Progress Review process a resounding success

JULY 2024



Introduction

Welcome to the Initial Progress Review Template user guide. In this document, you will be given advice on completing the form and wider points to consider. This course aligns with the AWD live offer sessions including onboarding strategies and practices, progress reviews and curriculum design.

Remember that when we are in the role of a progress reviewer, it is that that should drive the quality of the review. Therefore, not allowing the form to take 'the lead' and have a feel of a compliance-based 'tick box' exercise. It is important to listen for signs of when to 'close the form' and have a conversation without the form. Only reopening when the timing is correct.

Purpose of the resource

This resource will help apprentices, employers, and training providers to use the template for initial progress reviews.

The template aims to create a smooth transition from enrolment to the induction and onboarding phase and the first and subsequent progress reviews

How to use the resource

Note: Remember these are suggestions that can be edited to suit your organisation. The template is a guide for you during that crucial first progress review

Programme

When completing the Programme section, encourage the apprentice to reflect on their initial expectations and how they aligned with the reality of the programme. If an apprentice is happy, ask them to explain why and what it is about the programme that they are excited about.

If there are any discrepancies or uncertainties, document them clearly and when appropriate discuss them with the apprentice and the employer and look for adjustments or clarifications.

This initial alignment and confirmation will help set a strong foundation for their journey. Early into the progress review, use the opportunity to get to know them and see how you can align that knowledge to support their programme of study.

Induction

As you use the Induction section, ask apprentices about their induction experience and 'fill in' gaps they may have. This may feed into the actions section at the end of the progress review form. After that, reflect with them by discussing their Initial skills scan, and asking them if they have made any developments so far. Sharing progress this early on is a big achievement. Ask the apprentice how they could use the skill scan as a document throughout the journey to capture progress and competency gained. To conclude this final section, capture from the apprentice any additional support they think

they may need that has become apparent. You can remind the apprentice that 'needs' come in various guises and is not just as linear as needing 'extra time in an exam'.

Short and Long-Term Goals

Within the Short and Long-Term Goals section, setting a clear and aspirational career goal is vital. This goal should be ambitious yet achievable for the apprentice, providing a long-term vision to strive for.

When outlining how the apprenticeship will help the apprentice achieve this goal, be specific about asking about the skills, experiences, and qualifications they would expect to gain.

Also, list short-term goals that serve as stepping stones towards their long-term ambition. These should be concrete, measurable, and time-bound to keep the apprentice focused and motivated. These short-term goals are important for building confidence early and making progress. Likewise, helping the apprentice to break down some of the larger targets that they may have.

Health and Wellbeing

For the Health and Wellbeing section, fundamentally, the apprentice needs to understand the resources and support systems that are available to help them navigate any challenges that they encounter during their apprenticeship. It is also an opportunity to introduce core topics within Health and Wellbeing. Take your time with this section, put the 'form down' at this point. Making the apprentice feel safe and helping them know where to go for support is crucial for any apprentice regardless of age or level of study.

Health and Safety

In the Health and Safety section, make sure they have familiarised themselves with the procedures and contacts for reporting safety concerns. It is important to make clear that they may feel uncomfortable in sharing these kinds of concerns when starting in an apprenticeship and that this is an opportunity to speak to the progress reviewer to support translating this message to the employer.

End Point Assessment (EPA)

It is important to set an early understanding of The End Point Assessment (EPA) without adding unnecessary pressure. However, it does set the scene by getting the apprentice to understand the various assessment methods that will be used, such as portfolio showcase, exams, professional discussions, and observations. Reflect together how the employer will support the apprentice in preparing for these assessments, including providing time, resources, and guidance. Check that both the apprentice and the employer clearly understand the assessment plan and responsibilities, which will help streamline the process and improve chances of success. Introduce them both to where they can find their apprenticeship standard/assessment plan.

www.instituteforapprenticeships.org/apprenticeship-standards/

Next Step Actions

The discussions guided by this Initial Review form may already show completion of some of the apprentice's targets. Targets at this stage should be typically 'soft rather than hard', aimed at building confidence and helping them feel like they are making a positive process. Be mindful of setting too many targets. Around five soft targets is good practice.

Signatures

Explain how at the end of each progress review that 'we' sign for declaration of the conversations that have taken place, and the actions agreed upon but also to set the next progress review date. This is a prime opportunity to do this with both the employer and the apprentice together in a tripartite fashion.

Finally, in the Signatures section, make sure all parties—the employer representative, the training provider representative, and the apprentice—sign off on the document to formalise the review and underscore the commitment of all involved parties to the agreed-upon goals and actions. Set a date for the next review to maintain regular progress tracking and accountability

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