

## Learner Reviews and Action Planning

What should a learner expect from a review? There are many mixed views about the content of a progress review, how often they should be carried out, who should be involved, what paperwork should be completed etc. This paper looks at the various questions and gives an indication of what is needed in order for inspectors to be comfortable with the review process and for learners and employers to benefit fully. This list however, is not an exhaustive one, but gives guidance on content.

A review is many things, but is often just viewed as a three monthly chat with a learner to check how they are progressing with their NVQ and to set a couple of actions to achieve the next unit! These types of review are thankfully dying out, but are still in evidence across the sector.

The recommended time span between reviews is 12 weeks and this provides sufficient time for work to be completed and development to take place. Many providers have brought the time for reviews down to every eight weeks, which still gives ample time for actions to be completed and development to take place. Obviously, for those learners with support needs the frequency of reviews needs to be established individually at the beginning of their programme and changed as they progress. Some providers review their learners every four weeks and combine visits with assessments, this can devalue a review as they should be carried out in a quiet place, away from the "shop floor" and given plenty of quality time – although it is accepted that this is not always possible in some sectors, but every effort should be made to find a place away from the busy working environment.

Whatever an organisation's timing is, there are a few basic rules that should be adhered to when carrying out the review:

- Always plan a review, make sure the learner knows what to expect and what to bring
- Always refer back to the last review (where appropriate) and check whether actions set then have been completed – if not explore the reasons why
- Always make sure the employer has been invited and attends – it is important to make the employers aware of the value of the review in the learning process and highlight their involvement as being positive both for them and the learner
- Always make sure there is plenty of time set aside for a chat with the learner at the beginning of the review, talk generally about how the job's going, how are things at home, how are they getting on with their colleagues, what social activities have they

been doing etc. You can get an awful lot of information by “chatting” with learners, most of which can be referred to in a review. Obviously, any confidential information would not be noted down on the review form.

- Look at how the learner is progressing towards their qualification, have they achieved any more units/elements since the last review, have they achieved any additional qualifications, have they achieved their key skills or technical certificate etc. This however, is not the only focus of a review.
- Look at what the learner has learned at work since the last visit and how this links with their qualification, can any of it be used as evidence?
- Has the learner taken on any additional responsibility since the last review?
- Has the learner achieved anything outside of work (e.g. have they passed their driving test, won any competitions, looked after someone etc.)
- Has the employer changed the learner’s job role in any way since the last visit?
- Are there any gaps in the learners’ knowledge that cannot be addressed at work?
- Has the learner had any difficulties at work since the last review?
- How have these been resolved, have they been resolved?
- Is anything going on in their personal life that might have a negative effect on their training?
- If support needs were identified at the beginning of the programme, do these need revising/reassessing as the learner has progressed?
- Has the learner been involved in any accidents or safety issues since the last review? If so, have these been reported and dealt with?
- Is the learner clear about their responsibilities regarding equal opportunities? – it is important to ensure the learner is not just asked a closed question regarding equal opportunities, the reviewer must check their understanding of what they perceive to be right and wrong behaviour, how they can expect to be treated, how they should treat others for example. At review, the work carried out during induction regarding equal opportunities should be reinforced and built on to make sure the learner is working in a safe environment and does not compromise their position.
- All target setting should be SMART, this will hopefully assist the learner to progress through their qualification, knowing what they have achieved and how much more there is to go
- There should be space on the review form to record how long each review visit has taken

- There should be an indication on the review form of how far through the qualification the learner is against their targeted achievement dates
- Comments should be obtained from both the learner and the employer, try to discourage bland statements from learners like “I am enjoying my training” and link their comments to something you have discussed through the review. The same goes for the employer, try to persuade them to be constructive.

The action planning carried out at a review should provide the medium term targets that the learner is working towards (the ILP provides the long term targets and the assessment visits provide the short term targets). All the targets should be linked and should help the learner to progress through their qualification aware of where they are at any stage. The ILP should be referred to and updated at every review to ensure the long term targets are still appropriate – some learners will progress more quickly through their qualifications and others will require more time, this must be reflected on the ILP (with the emphasis on the I – Individual).

Targets set at review should not just focus on the achievement of the qualification but should also link to development in the workplace and personal development and these should also take account of the short term targets set at assessment visits. If the reviewer and the assessor are different people, it is essential that communication is effective to enable this linking of information.

Review documentation should be comprehensively completed and signed and dated at the time of the visit. Copies should be left with the learner and the employer and also held in the learner’s file for audit purposes.

The review is a small part of the learning process but is vitally important and is often one of those things that gets rushed or not completed correctly. Taking time to get it right can make a huge difference to the progress of some learners and can help to identify learners that might be at risk of leaving but for most learners and employers it should be a time to motivate and celebrate progress and achievement, whilst offering support and guidance.

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