Reviews

What?
- look back – review learning
- look ahead – plan the next steps.

Why?
Learning generally goes better when it’s managed to some extent. It’s not good to over-manage learning, because people need to go their own way at it and take their own course. But it’s helpful to pause every so often, look at what’s been going on in the learning and plan ahead. Reviews are part of this continuous process of managing learning.

Formal reviews are a requirement of the Learning and Skills Council in all work-based learning programmes. For learners on a Modern Apprenticeship (MA), reviews should take place every twelve weeks at a minimum and more frequently if needed.

Reviews are also included in the common inspection framework, which looks at the effectiveness of teaching, training and learning. One of the areas inspectors from the Adult Learning Inspectorate evaluate is the extent to which providers:

“...with learners, develop individual learning plans, informed by initial assessment, that are reviewed and updated regularly.”


All those contributing to the learning during the period under review should take part in the review process. This should help to coordinate the learning. As well as learners themselves, other participants might include:
- trainers and assessors
- work supervisors
- staff in sub-contractors, e.g. colleges
- staff in providers or other organisations involved with the learner.

It’s important not to think of learners’ individual learning programmes as static – see the factsheet entitled ‘Individual learning’ for more on this. Regular reviews provide an opportunity to take stock and change the direction or pace of the learning if necessary. Reviews should:
- look at what has been achieved during the period
- seek the views of participants on the learner’s progress and performance
- plan learning and set targets for the next period
- identify any support needed to help the learner achieve these targets.

Records of reviews should be kept and copies given to the main participants. Learners should be encouraged to look at their latest review from time to time, to remind themselves of the targets they are aiming to achieve by the next review. Dates for reviews, and the fact that they have taken place as planned, should be recorded on each learner’s individual learning plan.
With such a straightforward process, it may be surprising that things go wrong. The great majority of employers and providers make sure that reviews are carried out as planned. But they are often not done as well as they should be, as is shown by the comments from inspection noted below. There is plenty of room for improvement.

**Key facts**
- Reviews are not well planned, and employers are seldom involved in them.
- Reviews are often perfunctory and learners are not set targets to help them move systematically and efficiently towards qualification.
- Learners are uncertain as to what supervisors want them to do before the next review.
- Records of reviews are insufficiently detailed to make them useful in plotting and encouraging achievement.

**How?**

**Look back – review learning**

A broad timetable for reviews is included on individual learning plans. Specific dates, times and locations should be confirmed in advance with learners and other participants. If learners divide their time between the workplace and training off the job, it makes sense to carry out reviews alternately in each location.

Learners may need to prepare for the review, e.g. by bringing along completed projects or assignments. Copies of the last review should be available so that progress can be checked against targets.

Most employers and providers have a standard form for recording the outcomes of reviews. The form also lists what the reviews should cover. The main points in relation to reviewing learning are listed below. Other standard items include health and safety and equal opportunities.

**Content of reviews - reviewing learning**
- Achievement of targets set in the last review – or progress towards them if the targets have not been achieved.
- Progress towards framework qualifications – NVQ units, technical certificates, key/basic skills, additional qualifications or other learning goals.
- Discussion about opportunities that have occurred for learning in the workplace and how these relate to the framework.
- Discussion about any off-the-job training received and how this fits into the overall programme of learning.
- Feedback from tutors, workplace supervisors and others on how well learners are doing at work and in their learning.
- Feedback from learners on what they have learned, focusing on successes and any problems they have experienced in learning.
An important function of reviews is to let learners know how well they are doing and what they need to do to succeed. This should be a two-way process with ample opportunity for learners to talk and reflect on their own progress. It helps to:

- ask open questions, e.g. How did you do that?’ or ‘Tell me more about what happened.’
- listen carefully to what the learner says and pick up on any concerns
- be clear about things they have done well and where they may still need help
- give specific comments where necessary, e.g. ‘That’s not safe – you should always switch the machine off first’ or ‘If you raise your voice to a customer you risk causing a scene and losing the sale’.

Another related function of reviews is to find out what workplace supervisors and tutors think about learners’ recent progress. This includes:

- timekeeping and attendance
- attitude
- performance and progress at work and in learning.

Performance in these different areas can be measured on a simple 1 to 5 scale (1 = excellent, 5 = poor), which provides a quick and easy way to make comparisons and assessments.

If reviews are carried out on site, it’s important to get the supervisor’s opinion on the training programme, especially the extent to which they feel it helps learners to perform better at work.

**Look ahead – plan the next steps**

Once the learner’s progress has been reviewed, the focus of the review shifts to planning ahead. The main points to be covered are listed below.

**Content of reviews – planning ahead**

- Set new targets, or modify previous ones if they have not yet been achieved.
- Discuss ways in which learners can achieve the new targets, including the people and other resources they may need to help them.
- Agree an action plan for the learning, including any assessments due to take place and further training off the job.

Targets should be **SMART**:

- Specific, focused targets give learners a real sense of direction.
- Measurable targets are quantifiable tasks or actions where a learner can see a clear goal.
- Achievable targets will lead to a greater sense of achievement at each review.
- Realistic targets are ones that learners have a good chance of meeting.
- Time-bound targets help learners set priorities for their learning.
Action plans are likely to require employers and providers to take actions as well as learners, so that the things planned can actually take place. Examples are:

- talking to the work supervisor about a specific task the learner needs to practise
- arranging for further training, e.g. in basic skills
- seeking out and providing resources
- talking to other members of staff about the help needed.

And there’s a final stage in the cycle. The information gained from carrying out reviews with a number of learners over time gives the organisation as a whole useful information, which can be used to improve the quality of learners’ experiences. This kind of information should be fed back to managers so that action can be taken to improve the quality of training and learning overall.

Examples of the broader issues which can affect learners’ progress include:

- the relationship between learners and their supervisors or tutors
- whether the work meets the learner’s expectations and the requirements of the NVQ
- whether learners need more support in particular areas, such as basic skills
- problems outside work or training.

Where and when

There are no rules about where to conduct reviews – somewhere private and at a quiet time are usually best. For reviews to be effective, they need to be carried out at regular intervals, so it’s good practice during the review to fix a date and time for the next one.

Case studies and examples

Review forms don’t have to be complicated. Here is one example.

![Review form example]

Checklist

- What do reviews carried out by your organisation cover, in addition to the items listed in the factsheet?
- Who is involved in the reviews?
- How do you make sure that learners’ progress and performance are reviewed thoroughly?
- How do you make sure that learners are given clear targets and action plans during reviews?
- What use does your organisation make of the information gained from reviews?