

THE ROLE OF THE TRIPARTITE REVIEWER – MODELS IN HIGHER APPRENTICESHIPS

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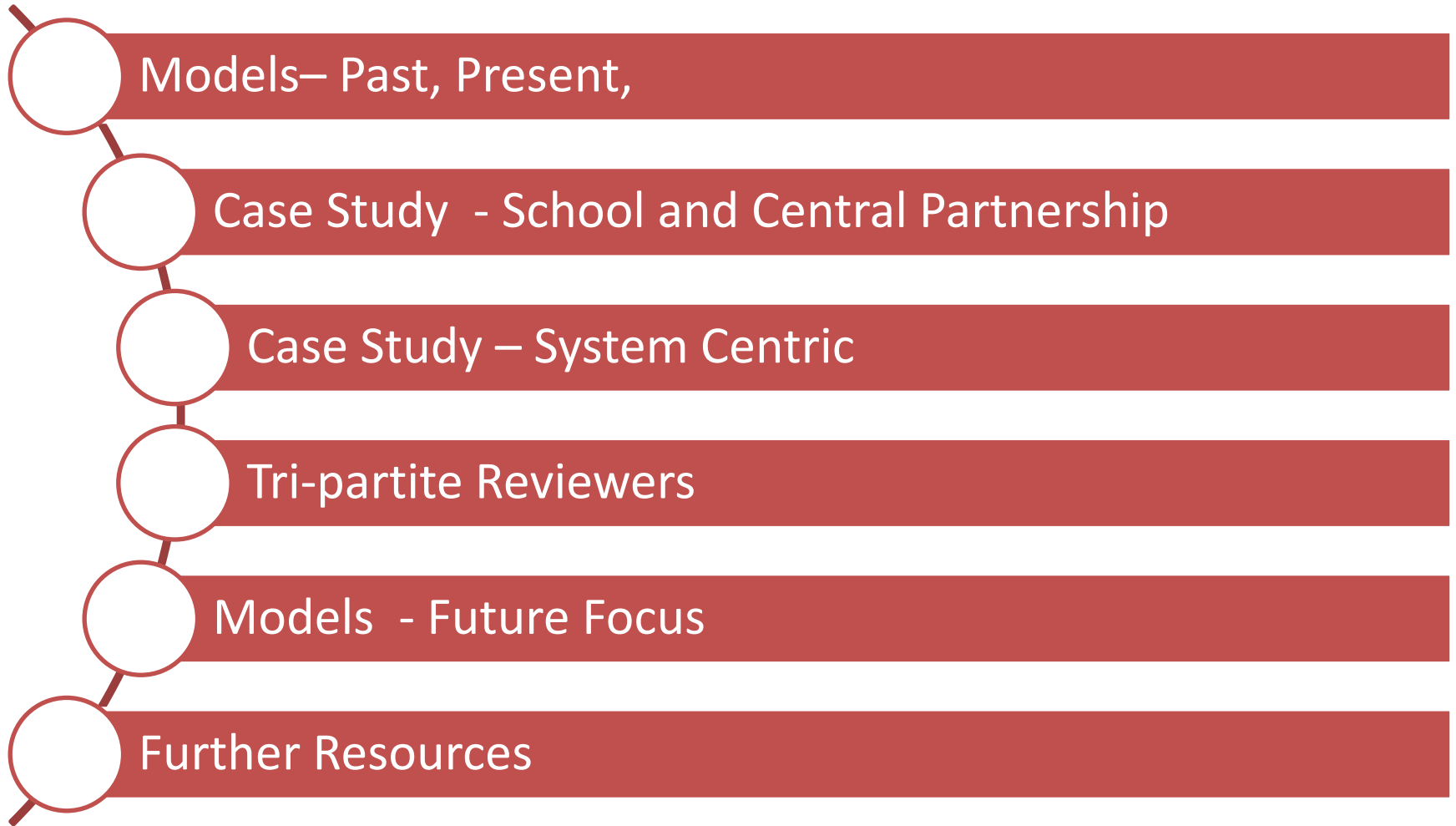
  UVAC 2022

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Agenda



POLLS

1. Are your Tri-partite reviewers :

- 1.Full time Tri-partite reviewer - academics
- 2.Full time Tri-partite reviewer non-academics
- 3.Wholly dedicated to the Tri-partite reviewer
- 4.Have a split role partially dedicated Tri-partite reviewer non-academics
- 5.A mix of all or some of the above

2. Are your Tri-partite reviewers:

- 1.Based in the school, but are line managed by the Apprenticeship Hub
- 2.Based in the school, are line managed by the School
- 3.Based with the Apprenticeship Team, but line managed by the school
- 4.Based with the App Team, line managed by the Apprenticeship Team
- 5.Based with or managed by a different team

Are your Tri-partite reviewers :

- 1.Generalists, supporting any course
- 2.Dedicated to one or two courses at most in a single sector area
- 3.Dedicate to their' apprenticeship only

MODELS

Models - Transition

CHORE Unnecessary Administrative Burden

- Low value, High cost
- School Led - Academics with a reduced teaching load
- Compliance risk
- Templates, Paperwork
- REVIEWER CENTRIC

TACTIC Core to Apprenticeship Success

- High Value, High Worth
- Partnership between school and centre
- Compliance Opportunity and 'protects' university
- APPRENTICE CENTRIC

Models & Challenges

School – Academic Mentor

- Academics with partial case load
- Either significant caseload or some times lots of reviewers on a single programme
- Erratic caseloads and no workload profiling
- A compliance requirement – ‘no value to achievement’
- Access to subject knowledgeable staff

Central – Compliance Facilitator/ Coach

- Skills rather than subject knowledge
- Compliance focused
- Not seen as parity with academics - by apprentice or employer
- Complex process to attain information about progress



Ofsted & Opportunities: checklist

1. Expectation of 'coach' ongoing contexting and embedding
2. Setting individual starting points – access to the information ahead of induction – early RAG rating
3. Contexting core apprenticeship curriculum
4. Leads the focus on the individual
5. Works with the tutors and referral services
6. Embeds the EPA preparation
7. Tracks off the job learning, absence,
8. Custodian of Apprentice success

CASE STUDIES

Tri-partite reviews at Staffordshire University



Elizabeth Myatt
Apprenticeship
Quality Manager

Maighr ad Hegarty
Associate Dean,
Apprenticeships



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Context

Apprenticeships at Staffordshire University

- Framework apprenticeships L4/5 from 2015
- Early adoption of trailblazer degree apprenticeships from 2017
- Current apprenticeship enrolment 2534 (ILR 09 -2022)
- 21 standards
- PCDA over 50% of current provision.

Progress (tri-partite reviews)

- Minimum quarterly- 4 per year
- Regular academic monitoring reviews inform tri-partite reviews
- Tripartite reviews carried out by work-based education officers (WBEOs)
- WBEOs usually standard/course specific
- Ratio of 1:90
- Currently review process transferring to APTM

Review Template

- [Tripartite Review Template Sept19 \(2\).docx](#)

The WBEO role

Background

- 2019 Ofsted inspection L4/5 found insufficient tracking of progress from starting points with qualification progression used as main measure of progress and minimal tracking of KSB development
- First WBEO appointed in 2019.
- In 2022 – approximately 30 WBEOs.
- Initial focus of role - ESFA compliance including OJTH. Now more focus on KSB tracking and quality of review content and impact.
- Embedding APTEM to support compliance and reporting

1 | 2 | 4 | 6 | 8 | 10 | 12 | 14 | 16 | 18 |

Staffordshire University
Higher & Degree Apprenticeship
Apprenticeship Workplace Learner Review and Progress Summary
(Tripartite Review)



NOTE – This document forms a record of progress with an individual's apprenticeship and may be audited by the Education and Skills Funding Agency (ESFA) as part of their monitoring and audit process to ensure provision of high quality apprenticeships. All sections of this document must be completed for each review. Reviews to be no more than 12 weeks apart. Completed Copies must be sent to Apprenticeships Team (apprenticeships@staffs.ac.uk) for storage on the Apprentice's File

Apprenticeship Title & Course Code:			
Apprentice Name:			
ULN Number:			
Student Number:			
Subcontractor name (if applicable):			
Employer (Company Name):			
Employer Representative:			
Course Leader:			
Work-Based Education Officer:	Visit date		Next visit due date
Purpose of the visit:	<input type="checkbox"/> Tripartite	<input type="checkbox"/> Gateway	<input type="checkbox"/> End of Programme

Outcomes:			
<input type="checkbox"/> Referrals to other Services:	<input type="checkbox"/> Yes <input type="checkbox"/> No	Referral Purpose:	
<input type="checkbox"/> Post Referral follow up summary:			<input type="checkbox"/> Referral Actioned
Progress Summary:	<input type="checkbox"/> G	<input type="checkbox"/> R	<input type="checkbox"/> A
<input type="checkbox"/> Progress in meeting the competencies of the apprenticeship standard	<input type="checkbox"/> On Schedule	<input type="checkbox"/> Ahead	<input type="checkbox"/> Action Plan
<input type="checkbox"/> Progress in meeting the required level (min 20%) of off the job learning	<input type="checkbox"/> On Schedule	<input type="checkbox"/> Ahead	<input type="checkbox"/> Behind

REVIEW OF PREVIOUS ACTIONS		
Targets	Progress	Met / Not met

REVIEW OF PROGRESS OF ELEMENTS OF APPRENTICESHIP STANDARD		Planned End Date			
Area for review	Comments and actions				
English Functional Skills Progress (if applicable)	% complete & target date				
Maths Functional Skills Progress (if applicable)	% complete & target date				
Digital Skills Progress (if applicable)	% complete & target date				
Attendance & timekeeping	In Work	Good	Satisfactory	Poor	
	In University	Good	Satisfactory	Poor	
Progress with Qualification (enter details)	% complete & target date				
Progress with any required additional qualification (Enter Details)	% complete & target date				
Record any Off the Job learning undertaken in the workplace since the last review	Number of Day/Hours "off the Job"	Description of Activities			

KSB'S TRACKER

Module 1	Expected Outcome	Progress Check	Evidence Example	Comments
KNOWLEDGE				
XXX	<input type="checkbox"/>	<input type="checkbox"/>		
XXX	<input type="checkbox"/>	<input type="checkbox"/>		
XXX	<input type="checkbox"/>	<input type="checkbox"/>		
SKILLS				
XXX	<input type="checkbox"/>	<input type="checkbox"/>		
XXX	<input type="checkbox"/>	<input type="checkbox"/>		
XXX	<input type="checkbox"/>	<input type="checkbox"/>		
BEHAVIOURS				
XXX	<input type="checkbox"/>	<input type="checkbox"/>		
XXX	<input type="checkbox"/>	<input type="checkbox"/>		
XXX	<input type="checkbox"/>	<input type="checkbox"/>		

Module 2	Expected Outcome	Progress Check	Evidence Example	Comments
KNOWLEDGE				
XXX	<input type="checkbox"/>	<input type="checkbox"/>		
XXX	<input type="checkbox"/>	<input type="checkbox"/>		
XXX	<input type="checkbox"/>	<input type="checkbox"/>		

SKILLS			
XXX	<input type="checkbox"/>	<input type="checkbox"/>	
XXX	<input type="checkbox"/>	<input type="checkbox"/>	
XXX	<input type="checkbox"/>	<input type="checkbox"/>	
BEHAVIOURS			
XXX	<input type="checkbox"/>	<input type="checkbox"/>	
XXX	<input type="checkbox"/>	<input type="checkbox"/>	
XXX	<input type="checkbox"/>	<input type="checkbox"/>	

ON TARGET	YES / NO	Actions needed to be taken
AT RISK	YES / NO	

ACTION PLAN		
SMART MILESTONE TARGETS AND ACTIONS	How will target be achieved	By when

APPRENTICE COMMENTS & PASTORAL CARE / ISSUES. (Confirm learner is receiving additional support if required.)

In this box record a summary of progress and performance at work that can include:

- Work/projects undertaken
- Off the job learning
- Successes/Learning
- Issues
- Problems

WORKPLACE MENTOR FEEDBACK ON APPRENTICE'S PROGRESSION AND OVERALL PROGRAMME SATISFACTION

WORK-BASED EDUCATION OFFICER COMMENTS

RECORD ANY HEALTH AND SAFETY, ETHICS OR CONFIDENTIALITY ISSUES BELOW:

SAFEGUARDING AND PREVENT – Are there any safeguarding or prevent issues that have not been dealt with in the workplace? Please indicate yes or no in each review meeting. If yes record comments and then **take action** in line with Staffordshire University's safeguarding policy

YES/NO

Record any feedback or comments on English and/or Maths progression below, where applicable:

The undersigned confirm that this is an accurate record of the Quarterly review and of the named apprentice's progress
 As a learner I confirm that my standard working hours are 30 or above per week. (If not, record details giving dates and reasons.)

Work-Based Education Officer signature	Learner signature	Workplace Mentor signature
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This section to be completed when the Gateway for End Point Assessment achieved	YES	NO
If yes, record evidence (Note, Specific EPA requirements for the standard being worked with should be cut and pasted into this box for each review)		
INTENDED DESTINATION		
The undersigned agree that the apprentice has now achieved the gateway criteria for this apprenticeship and is ready to undertake the end point assessment		
University representative signature and date	Employer Signature and Date	

Core Agenda Items - Update on progress, barriers, achievements

1. Review progress
 - Review progress against Action Plan and/or Referrals (as needed)
 - Review all parties view of progress to date, noting all measurable results e.g. assignment grades, successes
 - Consider Reflective Learning Journal commentary and learning
 - Review safeguarding and Prevent
2. Review / Action Milestone and Annual Agenda Items
 - Review Employer Satisfaction and Objectives
 - Confirm following year's priorities
3. Discuss, agree and document progression status
 - Document evidence of progress against the apprenticeship skills and competencies
 - Check whether 20% off the job is on schedule
 - Discuss and document any barriers or issues preventing progress
4. Agree any action needed & create action plan, objectives, timeline and responsibilities
 - For issues or for stretch
 - For support via referrals
 - To meet 20% off the job
 - Safeguarding and PREVENT

The WBEO role – cont'd

- The WBEO is a member of the course team based in the academic school
- Mostly grade 6. Schools and apprenticeship quality manager liaise on JD and duties. Drawn from a wide variety of backgrounds – (examples).
- The central apprenticeship team manages the WBEO processes such as CPD, generic content of reviews and OJTH checks. – Embedding in Aptem will support compliance checks.
- Quality is monitored by the apprenticeship quality manager including – observations, audit of reviews and RAG rating.
- Issues escalated to course leaders, apprenticeship team managers or business account managers.
- WBEO first point of contact regarding apprenticeship progress for employers.

Oversight of review process by central apprenticeship team

- Audit of regularity and quality of reviews
- Updating of processes – regular CPD events
- Each school has allocated apprenticeship officer who supports delivery and troubleshoots.
- Advice and guidance on regulations
- Escalation of emerging issues to employers.
- Monthly WBEO forum
- For implementation from September 2022 – SLAs on expectations and responsibilities

Challenges

- Academics appreciate support but occasionally WBEOs asked to cover lecturer/mentor duties
- Some WBEOs struggle to challenge senior employers or academics.
- They feel they don't have the status of the academics
- Rapid response to changes in regulations.
- Consistency across the provision –paperwork and practice
- Intention to offer coaching apprenticeships to less experienced WBEOs

Benefits

- WBEOs fully embedded in the course team, fully aware of apprenticeship progress
- Close relationship with academic mentor
- Accessible to apprentices
- KSBs fully embedded within delivery and assessment
- Central team retains oversight of processes and CPD to ensure compliance and quality of provision.
- Escalation routes clear and effective.

ANY QUESTIONS?



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University of Cumbria Evolving Tri-partite Reviews

Peter Train

Apprenticeship Development Manager

University of Cumbria Tri-partite Reviews

TPRs at Cumbria

- Volumes
- Range of Standards
- Models of Tri-partite review resourcing in schools
- Current movement in approach – Link Tutors

Tri-partite review Challenges

- In the centre
- In schools

Intentions

- Compliance with ESFA and OFSTED
- Culture of Supporting Development of Apprentices through whole journey
- Continuous Improvement
- Ability to Challenge and encourage development of practice

University of Cumbria Tri-partite Reviews

Implementation

- Regular Planned TPRs
- “As Needed” Performance Management TPRs
- Ability to report and monitor

Impact

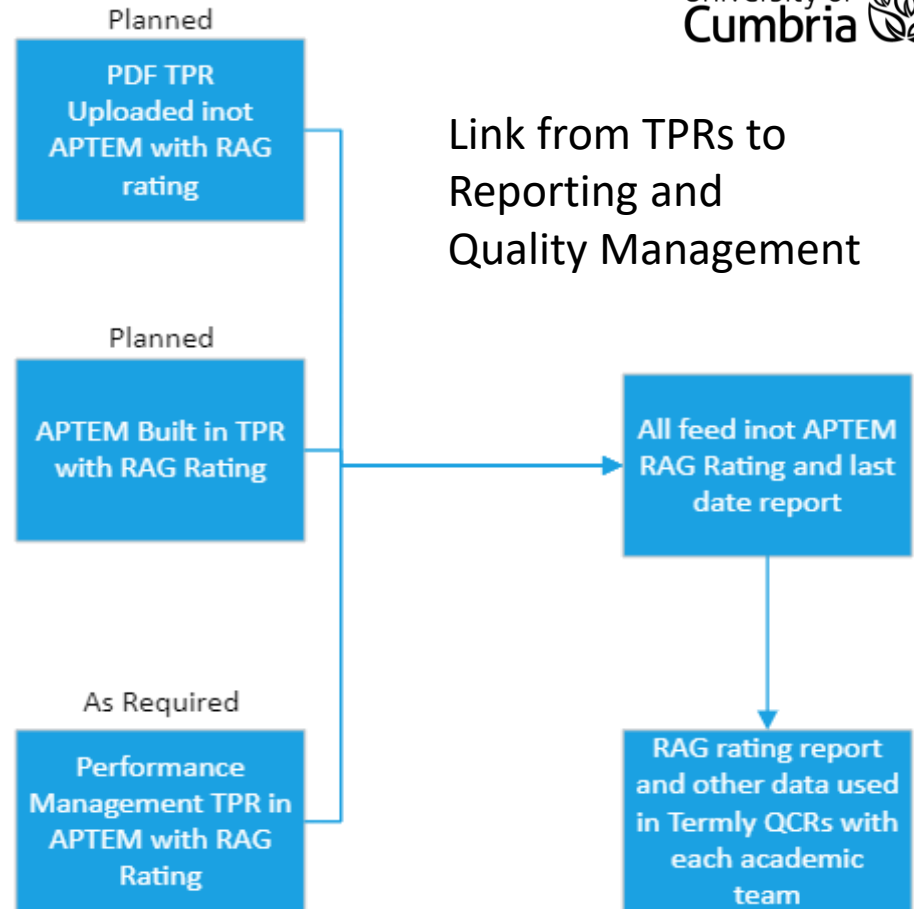
- TPR frequency has improved across all programmes
- Delivery teams now understand necessity of TPRs
- QCRs take place consistently
- **Next Steps:**

Quality and Relevance of TPRs

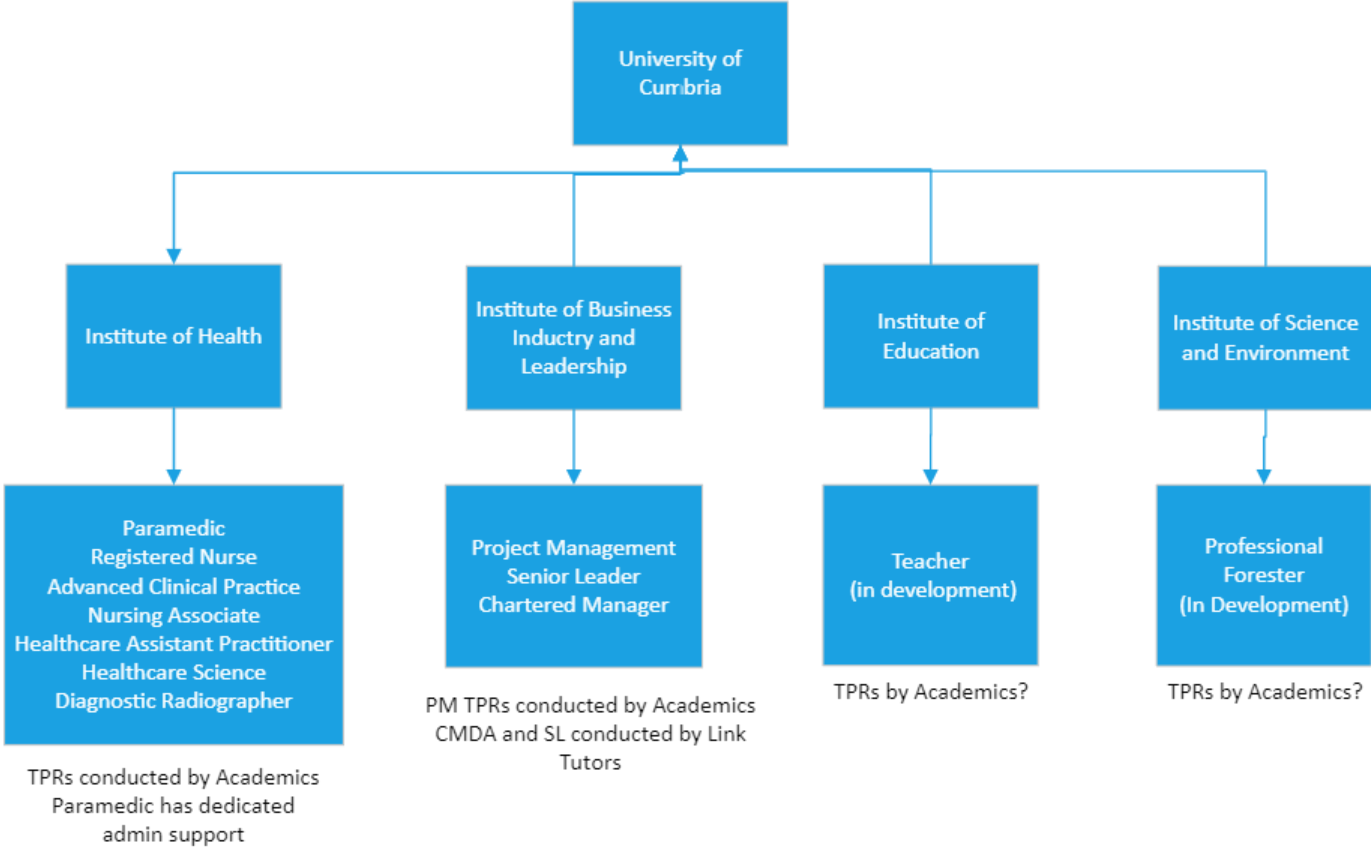
- Matching content to actuality
- Improved reporting

Planned TPR frequency in Policy

Year 1	1 TPR within 6 weeks, then 2 more reviews in first year
Year 2	2 reviews in year 2
Year 3	2 reviews in year 3
Year 4	2 reviews in year 4



University of Cumbria Institutes, Apprenticeship Programmes and TPR Delivery models/Responsibilities



Hints & Tips

QUESTIONS

FUTURE FOCUS

Future Hot Topics

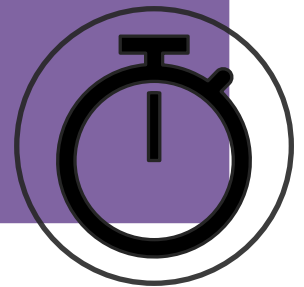
- ‘In the xx apprenticeship course leaders do not suitably link models and theory to apprentice job roles and apprentice do not understand the relevance to their workplace’ – marketing
- Leaders do not link theory to specific workplaces or allow time or take steps to clarify and consolidate learning for each apprentice

Linking off and on the job learning



- ‘Teachers and coaches do not always use information about apprentice starting points to ensure they can achieve their potential’
- ‘... or use this information to plan the curriculum and how they can make this interactive and relevant for each apprentice
- Learning is not relevant or is repeated and apprentice do not make the progress they should

INA and starting points



Future Focus

- Moderating for consistency
- 'value' defined by apprentice – how does it help them
- Contexting learning, 'core curriculum topics, prevent etc
- Skills of Reviewer – recruit and select

Quality



- A calendar of topics, focus throughout the year
- Increasing value of early interventions- week 3 -6
- Triaging by risk
- Additional shorter sessions – for action planning
- Targeting resource

Timing



Future Focus

- Focus on line manager and on the job learning
- Support – lead line manager induction, reviews liaison

Employer



- approach – with tutors in a more active role in the RAG assessment
- Coordination of other support and progress monitoring
- Action Plan checking *effectiveness*

Partnership



QUESTIONS



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Stay online for the survey



RESOURCES

Queries: r.rhodes@uvac.ac.uk

Listen again webcast link: [HERE](#)

Slide Pack: [HERE](#)

Webcast Listen & Watch

Recording Timestamp

Models

0:00:00

Case Study: Staffordshire

0:27:41

Case Study: Cumbria

0:59:54

Action Planning

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