

Trainer/ Tutor / Assessor Monthly Performance Review

Tutor/Coach Name:	<i>Insert name</i>
Month / Quarter	<i>Insert period being reviewed</i>

RAGG Rating	
Gold	Exceeds expectations
Green	Meets expectations
Amber	Needs support / development
Red	Unsatisfactory

RAGG need hard tangible number to measure against, it must be specific / and measurable

Total Caseload	Standards Delivering	Learner Numbers
<i>Total learners on caseload</i>		

Key Measure	Target	Expected	Actual	RAGG achieved	Comments
Mandates					
Learner Mandates Signed and Uploaded in first month	100% - Gold 95 – 99% - Green 90 – 94% - Amber Under 90% - Red				
Employer Mandates Signed and Uploaded in first month	100% - Gold 95 – 99% - Green 90 – 94% - Amber Under 90% - Red				
Learners completed Initial Assessments	100% - Gold 95 – 99% - Green 90 – 94% - Amber Under 90% - Red				
Number of Learners who need maths FS support					
Number of Learners who need English FS support					
Number of Learners with recognised need for ALN	100% - Gold 95 – 99% - Green 90 – 94% - Amber Under 90% - Red				

Learners have completed diagnostics and evidence uploaded to compliance documents (within 1 st month)	100% - Gold 95 – 99% - Green 90 – 94% - Amber Under 90% - Red				
Learners who require FS have detailed ILP uploaded (within 1 st month)	100% - Gold 95 – 99% - Green 90 – 94% - Amber Under 90% - Red				
Learners workshop hours verified	100% - Gold 90 – 99% - Green 75 – 89% - Amber Under 75% - Red				
20% off the job generated and signed off by learner, employer, and tutor	100% - Gold 90 – 99% - Green 75 – 89% - Amber Under 75% - Red				
Outstanding signatures on compliance documentation	0% - Gold 10 – 1% - Green 20 – 11% - Amber Over 20% - Red				
Outstanding assessments	0% - Gold 10 – 1% - Green 20 – 11% - Amber Over 20% - Red				

Evidence of functional skills training in month	100% - Gold 95 – 99% - Green 90 – 94% - Amber Under 90% - Red				
Number of Learners due to complete functional skills in month	N/A				
Learners passed planned end date for functional skills	0% - Gold 10 – 1% - Green 20 – 11% - Amber Over 20% - Red				
Evidence of teaching and learning in month	0% - Gold 5 – 1% - Green 10 – 6% - Amber Over 10% - Red				
Number of Learners behind target for off the job hours	0% - Gold 10 – 1% - Green 20 – 11% - Amber Over 20% - Red				
Reviews					
Outstanding Learner 12 Week Reviews	0% - Gold 10 – 1% - Green 20 – 11% - Amber Over 20% - Red				
Outstanding Learner Functional Skills Reviews	0% - Gold 10 – 1% - Green 20 – 11% - Amber Over 20% - Red				

Completions					
Number of Learners due to complete their apprenticeship in month	N/A				
Number of learners reaching planned Gateway timely (as per delivery model)	100% - Gold 90 – 99% - Green 75 – 89% - Amber Under 74% - Red				
Current success rate of timely achievers	100% - Gold 90 – 99% - Green 75 – 89% - Amber Under 74% - Red				
Observation of Teaching & Learning					
Current OTLA Grading	1 - Gold 2a - Green 2b - Green 3 - Amber 4 - Red				
Number of new starts (or progressions) in month					
Number of Leavers in month					
Number of Learners who have gone on a planned break in month					
Number of Learners who were expected to return from a planned break					

Review of Objectives & Outstanding Actions

Review completion of actions agreed at previous review

Comments	Actions

Caseload Management

Review learner progression and any issues to agree a focus for caseload reviews moving forward

Comments	Actions
<u>20% off the job training:</u>	
<u>Functional Skills progress:</u>	
<u>Qualification progress:</u>	

Safeguarding or Prevent Issues to Record

Learner Name	Detail of action taken

Good News Stories

Learner Name	Information including who, qualification and what makes it a good news story

Personal & Professional Development / CPD

Review progress actions from Performance Development Reviews and identify additional development needs and actions

Comments	Actions

Tutor / Coach Signature:		Date:	
Manager Signature:		Date:	

Trainer/ Tutor / Assessor Monthly Performance Review Example

Tutor/Coach Name:	<i>Insert name</i>
Month / Quarter	<i>Insert period being reviewed</i>

RAGG Rating	
Gold	Exceeds expectations
Green	Meets expectations
Amber	Needs support / development
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RAGG need hard tangible number to measure against, it must be specific / and measurable

Total Caseload	Standards Delivering	Learner Numbers
<i>Total learners on caseload</i>	<i>Qualifications being delivered e.g. Team Leading Level 3</i>	<i>Breakdown of learner numbers for each standard</i>

Key Measure	Target	Expected	Actual	RAGG achieved	Comments
Mandates					
Learner Mandates Signed and Uploaded in first month	100% - Gold 95 – 99% - Green 90 – 94% - Amber Under 90% - Red	35	34	97%	<i>There is a learner from XXXXXXXX who are yet to have mandates uploaded. This will be collected at my next visits on DD/MM/YY and uploaded on the same day.</i>
Employer Mandates Signed and Uploaded in first month	100% - Gold 95 – 99% - Green 90 – 94% - Amber Under 90% - Red	35	35	100%	<i>All employer mandates are on the system and were complete in month one of learners enrolling.</i>
Learners completed Initial Assessments	100% - Gold 95 – 99% - Green 90 – 94% - Amber Under 90% - Red	35	32	91%	<i>3 learners from XXX are still complete both initial assessments due to having limited access to resources to complete these. Appointments in centre have been arranged for all 3 learners and these will be done by DD/MM/YY. This has been agreed with their employer.</i>
Functional Skills					
Number of Learners who need maths FS support	N/A	1	1		<i>Joe Bloggs requires FS maths support. His ILP has been updated to reflect this and a plan is in place to support the learner in achieving this. His first appointment is DD/MM/YY</i>
Number of Learners who need English FS support	N/A	3	3		<i>Joe Bloggs & Sarah Smith require FS English support. Their ILPs have been updated to reflect this and a plan is in place to support both learners in achieving. Sarah will need additional support due to her specific needs (again highlighted in her ILP on</i>

					<i>the system) but I am confident she will achieve with the support of the Functional Skills tutor. First appointments are booked in for DD/MM/YY. Nigel Johnstone is progressing well with his learning and is on target to sit his test on DD/MM/YY.</i>
Number of Learners with recognised need for ALN	N/A	1	1		<i>Amy Brown requires ALN for her maths. All evidence is on the system and her ILP is up to date to reflect this. Her employer is happy with the support she is receiving and happy to allow her extra time to spend on her qualifications. This will be addressed again at her next review on DD/MM/YY</i>
Learners have completed diagnostics and evidence uploaded to compliance documents (within 1 st month)	100% - Gold 95 – 99% - Green 90 – 94% - Amber Under 90% - Red	35	32	91%	<i>All diagnostics have been complete at the first training session on the DD/MM/YY and evidence uploaded. Awaiting completion by 3 learners, this is scheduled for DD/MM/YY</i>
Learners who require FS have detailed ILP uploaded (within 1 st month)	100% - Gold 95 – 99% - Green 90 – 94% - Amber Under 90% - Red	35	32	91%	<i>The ILPs for all learners are updated on the same day as they complete assessments and diagnostics ensuring that their records are accurate at all times and complete timely. Awaiting remaining 3 learners to complete IA and diagnostic to complete ILP's</i>
Compliance					
Learners workshop hours verified	100% - Gold 90 – 99% - Green 75 – 89% - Amber Under 75% - Red				<i>All workshop sessions hours verified – XXX missed session booked for DD/MM/YY, this has been rescheduled with the learner and employer for DD/MM/YY and learning plan amended.</i>
20% off the job generated and signed off by learner, employer, and tutor	100% - Gold 90 – 99% - Green 75 – 89% - Amber Under 75% - Red				<i>I have had an issue in relation to getting signatures from the manager of XXXXXXXX to confirm the 20% off the job learning activities which equates to a large proportion of my caseload. I have a call booked in with XXXXXXXX on DD/MM/YY which will give me the opportunity to address this with them and get these updated.</i>

Outstanding signatures on compliance documentation	0% - Gold 10 – 1% - Green 20 – 11% - Amber Over 20% - Red				Awaiting signatures from XXX and XXX for updated ILP – Plan to complete on the DD/MM/YY
Outstanding assessments	0% - Gold 10 – 1% - Green 20 – 11% - Amber Over 20% - Red	0	5	14%	Majority of learner work assessed with feedback provided. Resubmission of XXX requested for XXX with new deadline of DD/MM/YY. Submission of work from session XX awaiting assessment. Plans made to complete this on DD/MM/YY
Evidence of functional skills training in month	100% - Gold 95 – 99% - Green 90 – 94% - Amber Under 90% - Red				All learners who require FS have evidence on the system. All learners who require FS have first appointments booked in and future appointments planned for the next 3 months which have been agreed with the learners and their employers.
Number of Learners due to complete functional skills in month	N/A	N/A	N/A	N/A	I had no learners due to complete their FS last month however I can confirm that all learners are on target to complete timely. XXXXX is likely to achieve early due to the progress they have made.
Learners passed planned end date for functional skills	0% - Gold 10 – 1% - Green 20 – 11% - Amber Over 20% - Red	0	0	0%	I have no learners who are over stayers and passed their planned end date for functional skills delivery.
Evidence of teaching and learning in month	0% - Gold 5 – 1% - Green 10 – 6% - Amber Over 10% - Red	0	0	0%	I have no learners who have no evidence of teaching and learning for last month
Number of Learners behind target for off the job hours	0% - Gold 10 – 1% - Green 20 – 11% - Amber Over 20% - Red	0	5	14%	Due to annual leave and sickness I have 5 learners who are behind on their off the job learning hours. The learners this relates to are: - Learner name / Employer All learners have an action plan in place to support them in getting back onto target which was addressed at their last reviews.

Reviews					
Outstanding Learner 12 Week Reviews	0% - Gold 10 – 1% - Green 20 – 11% - Amber Over 20% - Red	0	9	25%	<i>Due to the employer XXX having an unexpected increase in workload coupled with staff absence it was not appropriate for me to complete the planned reviews last month resulting in these not being complete timely. These reviews are now booked in for DD/MM/YY and the following learners will all be seen: - Learner name / Employer</i>
Outstanding Learner Functional Skills Reviews	0% - Gold 10 – 1% - Green 20 – 11% - Amber Over 20% - Red	0	0	0%	<i>All Functional Skills reviews are up to date and the reviews have been uploaded to the learner files.</i>
Completions					
Number of Learners due to complete their apprenticeship in month	N/A	2	2		<i>Learner name / Employer Both achieved timely and have had their EPA. With XXX getting a Pass and XXX a Distinction. The employer and learners have agreed to do a good news story which I will action.</i>
Number of learners reaching planned Gateway timely (as per delivery model)	100% - Gold 90 – 99% - Green 75 – 89% - Amber Under 74% - Red	2	2	100%	<i>As per the above. There was a challenge in getting Jerry Keane in timely due to the missed appointments previously but with the action plan in place and the support of his employer this was achieved.</i>
Current success rate of timely achievers	100% - Gold 90 – 99% - Green 75 – 89% - Amber Under 74% - Red			92%	<i>Current success rate is on 92% which is increasing month on month due to timely completions since Q1 where I had 4 learners who did not achieve timely. At present I have no concerns over my current learners and will continue to monitor progress to ensure I continue the trend of increasing my % of learners achieving timely.</i>
Observation of Teaching & Learning					
Current OTLA Grading	1 - Gold 2a - Green 2b - Green	1 – 2a	2b		<i>I am due my next OTLA next month and have taken time out to review my previous feedback to ensure I continue to embed positive behaviours but also to</i>

	3 - Amber 4 - Red				address where I can improve. I have used this feedback especially in relation to embedding safeguarding and prevent into my sessions which I hope will see me work towards a grade 1.
Starts / Leavers / Planned Breaks					
Number of new starts (or progressions) in month	N/A		10		(Name / Employer) have requested that 4 members of their team enrol onto a business admin level 2 qualification as well as 4 team leader / supervisor level 3 enrolments. List names / Enrolment date (Name Employer) have requested that 2 members of staff enrol onto customer service level 3 qualification. List names / Enrolment date
Number of Leavers in month	N/A		2		XXX withdrew on DD/MM/YY due to leaving employment and moving into a new role which was not relevant to his current qualification. A fully complete leavers form with evidenced last date of learning and signed by the employer was submitted. There is no pay back. XXX withdrew on DD/MM/YY due to personal reasons. We discussed her taking a planned break, but this is not possible and has been backed up by her employer. A fully complete leavers form with evidenced last date of learning and signed by the employer was submitted. There is no pay back.
Number of Learners who have gone on a planned break in month	N/A	1	1		XXX has gone on a planned break as she will need 3 months off to recover from an operation. Both learner and employer are committed to resuming qualification and a follow up appointment has been arranged for DD/MM/YY. A fully complete and signed planned break in learning form has been submitted and there is evidence on her portfolio up to the date.
Number of Learners who were expected to return from a planned break	N/A	2	2		XXX at (Name Employer) attended his planned appointment on DD/MM/YY and resumed his qualification. He does not require any further support or time away from the qualification and is looking forward to completing his qualification.

					XXX at (Name Employer) attended her planned appointment on DD/MM/YY and has resumed her qualification. All future appointments planned and booked.
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Review of Objectives & Outstanding Actions

Review completion of actions agreed at previous review

Comments	Actions
<i>Two learners are due to return from their planned breaks in learning. Speak to their employers to ensure that are back to work and have booked the time in their diary so that they are expecting you.</i>	<i>Spoke to (Employer Name Contact) on DD/MM/YY who confirmed that both learners returning from planned breaks in learning were back to work and had time allocated to meet with me. These meetings took place and both learners are back on programme.</i>
<i>Engage with the key decision makers within the businesses you are in to explore opportunities in bringing in further learners to maintain a healthy caseload.</i>	<i>I have allocated what averages to half a day per month to speak to employers to discuss future business needs in terms of upskilling their teams. This has brought success with 10 new learners this month. Allocating this time will help me maintain a strong caseload and a pipeline of learners.</i>
<i>Outstanding learner reviews be complete timely. All outstanding reviews to be planned in and complete. Speak to the employer and arrange to meet to have these complete.</i>	<i>Attempted to get these done last month (as covered in the KPI section). These are planned in for DD/MM/YY and to ensure moving forward that these are always done timely we have booked in future reviews in the diary which fall earlier in the month where there is less risk of work demands for the employer becoming priority over the learner reviews.</i>
<i>Upskill on the reports section of Aptem using training support or peer support.</i>	<i>I have spent time with (A colleague) who has shown me how to run reports will enables me to see where my learners are at and helps me in completing my reviews and the reviews of learners. This information is beneficial when holding updates with employers. I have created guidance notes on this which I am happy to share with the team at the next meeting.</i>

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Caseload Management

Review learner progression and any issues to agree a focus for caseload reviews moving forward

Comments	Actions
<p><u>20% off the job training:</u> The below learners are all behind target. See the reports for further details</p> <ul style="list-style-type: none"> - Learner Name 	<p><i>Liase with the learners and their line managers at their next review which is planned in for DD/MM/YY to plan in their OTJT which will bring them back inline with where they are required to be.</i></p>
<p><u>Functional Skills progress:</u> The below learners are showing as having had no FS appointments last month which has put them behind target for a timely completion</p> <ul style="list-style-type: none"> - Learner Name 	<p><i>Meeting with our Functional Skills tutor to address this. There was a lot of staff off on sick last month and this is likely to be the reason for no appointments but I will meet with their FS tutor by the end of w/c DD/MM/YY for an update and to confirm when they will be back on target.</i></p>
<p><u>Qualification progress:</u> The below learners are behind target with their qualification (See the report for further details) which will have an impact on them being timely completions. In addition, we cannot claim any funding if they over run their end date and we have new learners planned to come on to caseload.</p> <ul style="list-style-type: none"> - Learner name 	<p><i>These learners have all missed sessions over the last 3 months. I will be meeting with the learners and their managers this month (dates booked in) and I will have a suggested delivery plan with targets for the learners to complete their outstanding work to bring them back on target.</i></p>

Safeguarding or Prevent Issues to Record

Learner Name	Detail of action taken

Good News Stories

Learner Name	Information including who, qualification and what makes it a good news story
<i>Learner Name</i>	<i>Complete his Team Leader / Supervisor Level 3 qualification achieving a pass. Having left school with no qualifications this is officially his first ever qualification he has achieved at the age of 52 showing that you are never too old to learn new skills. Jerry has been supported throughout his qualification by his employer who is more than happy to provide a testimonial and be part of any kind of good news story we look to publish.</i>
<i>Learner Name</i>	<i>Anne achieved a distinction in her Team Leader Supervisor Level 3 qualification and to make it an even more memorable month for Anne she has gained a promotion which she credits the support from her Training Provider and Coach for giving her the knowledge, experiences and confidence which she used in her exemplified throughout the application and interview process.</i>

Personal & Professional Development / CPD

Review progress actions from Performance Development Reviews and identify additional development needs and actions

Comments	Actions
<i>As discussed in my last review I would like to develop myself and a career within the organisation and would like to explore leadership opportunities and qualifications to support me. Having been a team leader in my previous company I feel I am now an established and credible member of staff who can develop others.</i>	<ul style="list-style-type: none"> - Explore acting up opportunities - Internal training - Qualifications to develop my skills

Tutor / Coach Signature:		Date:	
Manager Signature:		Date:	