KENT BUSINESS COLLEGE

HANDBOOK OF TEACHING QUALITY AND DELIVERY

Marking and Assessment in Apprenticeships

An evidence-informed reference
for apprenticeship coaches

Fair decisions. Useful feedback. Confident progress.

Kent Business College

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FIRST EDITION / 2026

Marking and Assessment in Apprenticeships

An evidence-informed reference for apprenticeship coaches

Written assignments • Reflection • Workplace evidence
Feedback • Learner support • Assessment readiness

Kent Business College

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Marking and Assessment in Apprenticeships is a professional reference for apprenticeship coaches, tutors, assessors, internal quality assurers and education leaders. It addresses apprenticeship provision in England. Its source review date is 12 September 2026.

This independent publication connects educational research, current official guidance and original practice examples. It supports professional development informed by CAVA assessment principles, current Level 5 teaching expectations and selected Level 7 education leadership themes. It is not an accredited qualification, an awarding-body specification or an official publication of the government, Ofsted, City & Guilds or OTHM. No endorsement by those organisations is implied. Qualification achievement requires the assessment and practical evidence specified by the relevant awarding organisation.

The apprentice's applicable occupational standard, assessment plan, funding-rule cohort and approved assessment arrangements govern formal decisions. The KBC learning-to-impact frame, rubrics, case exercises and templates are original practice aids. Their educational usefulness does not create additional national assessment or funding requirements. They have not been independently validated as a single assessment instrument.

All learner extracts, employer situations, numerical examples and cases are fictional teaching examples. They do not reproduce identifiable apprentice records. Names of qualifications and organisations identify sources and scope; they do not imply a commercial partnership or approval.

A note to the coach

Your assessment judgement has two responsibilities. It must make a fair, evidence-based decision about the work in front of you, and it should help the apprentice understand how to progress. These responsibilities reinforce one another when the criterion is clear, the evidence can be located and the next step is manageable. The handbook is written for those ordinary moments when a fluent assignment leaves you uncertain, a capable learner cannot explain their contribution or a returned piece of work has damaged confidence. It offers practical ways to investigate, decide and communicate without losing sight of the learner.

The book uses a connected approach to learning: respond to the task; identify new knowledge; examine skills and behaviours; consider employer and career impact; plan the next action; and prepare for the applicable assessment. Not every activity needs all seven elements in equal depth. A small piece of learning can be valuable without an immediate commercial result, and an unsuccessful workplace trial can reveal strong professional reasoning. Proportionate expectations keep the focus on learning and evidence.

Research is used with care. A study of university feedback or classroom retrieval does not directly establish an effect in every apprenticeship. Where an approach has been adapted to workplace coaching, the adaptation is professional reasoning rather than a claim that the exact template has been experimentally tested. Appendix E identifies the evidence base and the limits of the main applications. Use these sources to strengthen your judgement and to question assumptions, including those in your own practice.

Find the help you need

Your immediate question	Start here
What do knowledge, skills and behaviours look like in evidence?	Chapter 2
Can this assignment, reflection or LMS activity count as OTJ?	Chapter 3
Is the brief clear enough to mark fairly?	Chapter 4
What can I accept, and what needs further evidence?	Chapters 5 and 6

Your immediate question	Start here
How deep should a reflection be?	Chapter 7
Is this workplace evidence suitable for the portfolio?	Chapter 8
How do I phrase feedback and check its use?	Chapter 9
How do I assess a presentation fairly?	Chapter 10
What adjustment, integrity check or referral is appropriate?	Chapters 11 and 12
How do I demonstrate impact and assessment readiness?	Chapters 13 and 14
How can our team make decisions more consistent?	Chapters 15 and 16; Appendix D
Where are the reusable forms and qualification links?	Appendices A and B

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CHAPTER 01

Professional judgement at the heart of coaching

Read with purpose. Decide with evidence.

Distinguish receipt, learning, achievement and eligible training time. Use the KBC learning-to-impact frame proportionately and recognise the professional boundaries of coaching.

READ / EXAMINE THE CASES / APPLY / REVIEW

1.1 The submission is the beginning of a conversation

Imagine that you open an apprentice's monthly submission on a busy Friday afternoon. There are six pages, several screenshots and a confident statement that a new reporting process has improved the business. The writing is fluent, the references look plausible and the learner has attached a manager's signature. Yet you still do not know what the apprentice personally did, what they learnt or whether the reporting process helped anyone make a better decision. A quick “well done, all achieved” would clear the task from your queue but leave the most useful questions unanswered. A request to “add more detail” would move the uncertainty back to the learner without helping them resolve it. Your professional contribution is to identify what the work already demonstrates, what remains uncertain and which next step would turn uncertainty into useful evidence.

This is the craft of marking in apprenticeship coaching. You read the work as an assessor who must justify a decision and as an educator who can help the apprentice improve. You also work within an employment relationship, a training programme and an assessment system, each with different purposes and records. The same document may reveal new understanding, a gap in practical competence and a difficulty securing time to learn at work. Those findings deserve different responses. Good judgement keeps them distinct while making the learner's next step feel coherent and achievable. The aim is a defensible decision that also makes further learning possible.

Throughout this book, “coach” means the professional supporting occupational learning and progress. A coach may also be an authorised assessor, tutor or reviewer, but the title alone does not grant assessment authority. Where a qualification or assessment plan requires a particular competence, credential, independence arrangement or approval, that requirement still applies. A coach can give formative feedback without claiming the authority to award a qualification or make an independent apprenticeship assessment decision. Knowing where your role begins and ends is part of expertise. It protects the apprentice from confusing helpful guidance with a formal outcome.

1.2 What this handbook is for

This handbook is a working reference for coaches, tutors, assessors, internal quality assurers and education leaders in apprenticeship provision in England. It concentrates on written assignments, reflective learning, case analysis, critical analysis, presentations and workplace evidence. It follows the Kent Business College approach of connecting learning with occupational application, employer benefit, career development and preparation for apprenticeship assessment. It also explains why those ambitions must be proportionate to the task. A ten-minute learning response does not need to prove a business transformation. A substantial occupational assignment, however, should do more than describe attendance or repeat course material.

The book separates official requirements from research findings and original KBC practice aids. Official rules establish conditions that providers must meet; the applicable version matters. Research helps explain why an educational approach may be useful, while leaving room for differences between studies and apprenticeship settings. The KBC examples and templates offer ways to put sound principles into practice. They are not additional national funding rules, awarding-body assessment criteria or promises of an inspection grade. Read each worked case as an invitation to examine a decision, rather than a script that must fit every apprentice.

Every learner extract, employer scenario and numerical case in this book is fictional. They represent common professional situations without reproducing identifiable learner records. Where a case is incomplete, the missing information is intentional: deciding what you still need to know is part of assessment. Suggested responses illustrate justified options, and another response may be equally defensible if it respects the criterion and the evidence. Coaches should bring their occupational judgement to the examples. The most useful question is often, “What evidence would make me change my mind?”

1.3 Four decisions that should never be collapsed

When a learner uploads a document, the word “accepted” can hide several different decisions. You might mean that the submission arrived in the correct format, that the apprentice engaged with learning, that a particular criterion is met or that the evidence is suitable for a formal assessment portfolio. Those claims are not interchangeable. A beautifully organised folder may contain little evidence of learning, while an untidy but authentic calculation may demonstrate an important skill. A thoughtful reflection can guide development even where the applicable EPA plan excludes reflective accounts from its portfolio. Clarity about the decision prevents both overclaiming and unnecessary rejection.

Decision	Question to answer	Record to make
Submission received	Can the work be accessed and considered?	Receipt, version and any access issue
Learning demonstrated	What new understanding or capability does it reveal?	Developmental feedback and next learning
Criterion met	Does admissible evidence satisfy the specified requirement?	Criterion, evidence location and rationale
Training time eligible	Was qualifying training undertaken under the applicable funding rules?	Activity, actual time, context and evidence

Portfolio admissibility adds a further check when evidence is selected for a particular assessment method. The same workplace report may support several related criteria, but it must do so through identifiable content rather than repeated labels. An apprentice's statement that they learnt a technique is a useful starting point; a demonstration or explanation can help establish what they now understand. A training log establishes the learning activity and its context, rather than automatically proving competence. A manager's corroboration can establish what happened at work, rather than automatically confirming every mapped KSB. In each case, ask what the evidence can reasonably support.

1.4 The KBC learning-to-impact frame

The KBC learning-to-impact frame used in this handbook asks seven connected questions. First, has the learner answered the question or responded to the assigned learning activity? Second, what knowledge is new, corrected or more secure? Third, what skill or professional behaviour has been developed or demonstrated? Fourth, what difference has application made, or could a planned trial make, for the employer? Fifth, how does this learning affect the apprentice's career direction or professional capability? Sixth, what will happen next, and how will the learner know whether it worked? Seventh, what evidence or reasoning will help the apprentice prepare for the applicable assessment?

These questions form a conversation across a programme. They are not seven compulsory essay headings for every upload. An early reflection may contain a credible explanation of new knowledge and a planned workplace trial, with employer impact still prospective. A later case analysis should be able to examine actual application, evidence of effect and the limitations of its conclusions. A short quiz response might identify a misconception and direct a learner towards further teaching; it does not establish sustained professional behaviour. The coach should set the expected depth in the brief so that learners can put effort into meaningful work. Proportionate expectations make the frame useful rather than burdensome.

Consider a project apprentice who has learnt to distinguish a risk from an issue. The immediate knowledge gain is the distinction and its implications for action. A relevant skill might be revising a register using appropriate evidence and ownership. A behaviour might emerge when the apprentice raises a concern early and responds constructively to challenge. Employer impact might initially be a proposed trial in one team meeting, rather than an invented reduction in delay. The action plan can specify which entries will be reviewed and what evidence the learner will bring back. Assessment preparation then involves locating the record and explaining the decision in the learner's own words.

The frame also encourages honest reporting when a trial fails. A learner who explains why a campaign experiment did not improve conversion may demonstrate stronger reasoning than one who claims success without a baseline. The coach should examine the quality of the question, the integrity of the method, the interpretation of evidence and the adjustment made afterwards. Commercial success depends on factors outside the apprentice's control. Learning can therefore be substantial even when an intended outcome is not achieved. What matters is whether the required occupational understanding and performance are evidenced, and whether claims about impact are warranted.

1.5 From CAVA to teaching and education leadership

The Level 3 Certificate in Assessing Vocational Achievement, commonly called CAVA, provides a relevant foundation for understanding assessment principles and assessing both occupational competence and vocational learning. Level 5 teaching qualifications place assessment within curriculum design, teaching, inclusion and professional development. At Level 7, a named education management and leadership diploma can offer a useful perspective on strategy, quality and organisational improvement. These are different qualifications with different purposes. An apprenticeship coach's development may draw on all three without treating them as a single qualification ladder or implying that this handbook awards any of them.

The alignment in this book is thematic and practical. Chapters on planning assessment, interpreting evidence, recording decisions, feedback and quality assurance support study of assessor practice. Chapters on task design, inclusion, learner progress and the use of evidence connect assessment with effective teaching. Chapters on employer partnership, organisational learning and quality systems extend the discussion towards education leadership. The detailed mapping in Appendix B names the qualifications and distinguishes their scope. Your own awarding body's specification and centre assessment arrangements remain the authority for any qualification you are taking.

A professional qualification also requires performance in context. Reading about an assessment conversation is different from conducting one, recording the decision and responding to an internal quality assurer's challenge. A teaching qualification requires more than a portfolio of marking comments, and a leadership qualification requires more than supervising a team. This handbook can support preparation, reflection and workplace practice, but it cannot substitute for required observations, evidence or assessment. Coaches should keep their learning from the book connected to an agreed development plan. That connection turns a reference text into an active part of professional growth.

1.6 A relationship that supports challenge

An apprentice may experience a returned assignment as a judgement of their intelligence or professional worth. This risk increases when the learner is anxious, returning to study or working in a setting where mistakes attract blame. The coach needs to explain the decision with enough precision that the learner can see a route forward. Respectful language does not require avoiding difficult findings. It requires describing the evidence and the requirement without attaching a negative identity to the person. “The recommendation is clear, but the comparison with the alternative is missing” gives the apprentice something to work on.

Learner agency matters here. Invite the apprentice to explain which part of the feedback they understand, which part they dispute and which next action they would choose. If they disagree, return to the criterion and the work rather than defending your status. A learner may have relevant evidence that they did not submit, or the task may have been ambiguous. Sometimes the appropriate outcome is to improve the brief or seek a second assessment view. Listening carefully makes decisions more reliable as well as more humane. The conversation should end with a clear record of what is agreed and what remains open.

Kent Business College's values can be made visible in these ordinary decisions. Empowering futures means helping learners understand and improve their own performance. Strengthening partnerships means agreeing useful workplace opportunities with employers while preserving assessment independence. Reducing the footprint can include purposeful digital records and avoiding unnecessary duplicate submissions. Safeguarding and inclusiveness require attention to safety, participation and access, with suitable specialist support where necessary. These values become credible when they change what a coach does with a learner's work.

1.7 Using the book during a working week

You can read the book from beginning to end, but its structure also supports quick reference. Begin with Chapters 2 and 3 when the uncertainty concerns standards, KSBs or training time. Use Chapters 4 to 8 when designing or marking an assignment and selecting evidence. Chapters 9 to 12 address feedback, presentations, fair assessment and learners whose progress has slowed. Chapters 13 to 16 connect assessment with impact, readiness, quality assurance and educational leadership. The appendices provide tools that can be adapted to the learner's programme and your approved processes.

For a first month of professional development, choose one ordinary submission and examine it through the book's different lenses. In the first week, test whether the brief and criteria are clear. In the second, record a decision with an exact evidence location and ask a colleague to challenge it. In the third, discuss your feedback with the learner and check what they changed. In the fourth, review whether the experience improved their understanding, evidence or participation. Keep one honest account of what you learnt as a coach. This is a more useful starting point than introducing every template at once.

1.8 In your next coaching session

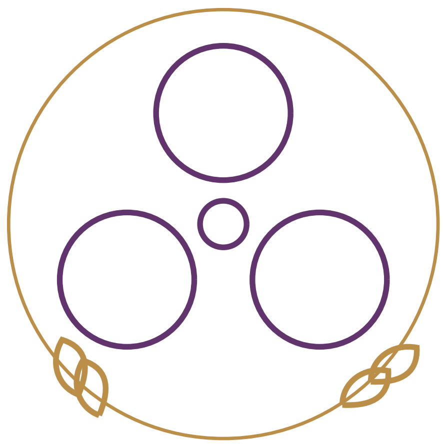
An apprentice has submitted an articulate reflection on a scheduling video, a completed multiple-choice quiz and a folder of workplace screenshots. Their learning log claims two hours for “portfolio and learning”. The reflection identifies a new distinction between a baseline and a forecast but gives no workplace example. The screenshots have no dates or explanation of the apprentice's contribution. The learner asks whether everything can now be marked as achieved. What would you accept, what would you clarify and what would you ask them to do next?

A defensible response would recognise the emerging understanding shown in the reflection while avoiding a blanket competence decision. Ask the apprentice to explain the baseline and forecast distinction using one relevant example, then agree an appropriate application or demonstration. Request dates, context and ownership for selected screenshots, rather than asking for more unstructured evidence. Review the two-hour entry by separating genuine learning from testing and portfolio compilation, applying the cohort's funding rules. Keep the reflection available for development and check the assessment plan before selecting anything for an EPA portfolio. End by agreeing one manageable action with a review point, and record the exact scope of the decision you have made.

FOUNDATIONS

CHAPTER 02

Apprenticeship standards, KSBs and the evidence landscape



Know the requirement before judging the work.

Translate the applicable occupational standard into clear evidence questions. Keep knowledge, skills and behaviours connected while respecting the purpose and limits of each assessment method.

READ / EXAMINE THE CASES / APPLY / REVIEW

2.1 A polished assignment is the beginning of the judgement

A project-controls apprentice submits an impressive report about a delayed engineering project. The terminology is confident, the diagrams are attractive and the recommendations sound sensible. The coach is initially ready to approve it. Then one question interrupts that first impression: what, exactly, does this report allow us to conclude about this apprentice? It may demonstrate an understanding of forecasting, but it may not show that the apprentice produced the forecast. It may describe a team's decision without identifying the apprentice's contribution. It may also have taken substantial learning time, but the document itself does not establish when that learning happened. Good marking begins by keeping these questions separate long enough to answer each properly.

Throughout this handbook, cases are fictional teaching examples. They represent plausible situations in project controls, project management and marketing, rather than accounts of identifiable apprentices or employers. Their purpose is to make judgement visible. The coach is invited to examine the reasoning behind a decision, including the evidence that would make a different decision justified. This is particularly important in an apprenticeship, where education, work and formal assessment meet. A learner can make valuable progress without having demonstrated full occupational competence yet. A carefully supported judgement recognises that progress while making the remaining gap clear.

2.2 Start with the occupation

An occupational standard describes the capabilities needed to perform an occupation. Knowledge, skills and behaviours, usually shortened to KSBs, express important components of those capabilities. They are connected, but they are not interchangeable labels. Knowledge concerns what the person needs to understand; skills concern what the person can do; behaviours concern how the person conducts themselves in occupational practice. A useful assessment asks for the type of evidence that fits the capability being considered. An explanation of negotiation principles is relevant knowledge evidence. A negotiation record, supported by direct observation and appropriate questioning, provides a stronger basis for judging the apprentice's use of those principles.

Component	Question for the coach	Useful evidence example	Limit of that evidence
Knowledge	What does the apprentice understand, and why?	An explanation comparing two forecasting approaches	Understanding does not establish competent use

Component	Question for the coach	Useful evidence example	Limit of that evidence
Skill	What can the apprentice perform to the required standard?	An attributable forecast and questions about its construction	One successful example may not establish consistency
Behaviour	How does the apprentice act in relevant situations?	Specific workplace examples of responsible challenge	General praise does not show what happened

These examples explain the distinction; they do not reproduce the wording of a particular standard. The coach must use the actual statements when deciding whether a submission meets a requirement. Words such as *evaluate*, *implement* and *lead* ask for different performances. Replacing the requirement to implement a process with an essay describing implementation changes what is being assessed. Equally, demanding evidence of leadership when the relevant requirement is to explain a concept introduces an unnecessary barrier. Read the requirement before forming an impression of the work.

2.3 Understand the four documents that shape a decision

The occupational standard sets out the occupation's required content. The assessment plan specifies the arrangements for assessing the apprenticeship. An assessment organisation's specification provides the authorised operational detail within that plan. Where the programme includes a qualification, its specification and assessment requirements also matter. These documents serve different purposes and should be held together in a controlled programme record. A provider's assignment brief translates selected learning requirements into a manageable task; it does not replace the documents above it. A local rubric helps coaches apply that brief consistently, but it cannot invent a different final assessment standard.

A useful programme record therefore identifies the standard reference and version, the relevant assessment-plan version, the apprentice's start date, and the applicable assessment organisation. It also records any mandatory qualification and the approved assignment brief. This takes less time than resolving a disagreement after several learners have been assessed against the wrong version. When a coach takes over a learner, these details should be immediately visible. The record should explain any authorised version transfer instead of silently replacing the original requirements. Version control is a practical protection for the learner, who needs a clear and stable account of what achievement requires.

2.4 Versions matter during assessment reform

England's apprenticeship assessment arrangements are changing in phases. Revised plans may allow assessment during the programme, give providers specified marking responsibilities, and place verification of behaviours with the employer. Those arrangements apply through the relevant released plan; they do not automatically replace every apprentice's existing EPA arrangements. Apprentices still learn the occupational content, even where formal assessment samples some knowledge and skills. The correct reference is the apprentice's actual standard and assessment plan, including any authorised transfer. (DWP, *Changes to apprenticeship assessment*, 2026, “Implementation and transition” and “Assessment plans”.)

The Associate Project Manager standard illustrates why the distinction matters. Its published version log identifies version 1.5 for starts from 27 November 2025 to 27 January 2027, with a revised assessment version awaiting implementation from 28 January 2027. A coach working in September 2026 should therefore avoid taking a future assessment design and treating it as the current learner's requirement. An earlier apprentice may still be following version 1.4. The standard reference remains recognisable, yet the applicable assessment detail differs. Recording “APM Level 4” alone leaves too much unresolved. (Skills England, *Associate project manager ST0310,* version log, accessed September 2026.)

2.5 Identify the starting point before interpreting progress

Two apprentices can submit work of similar quality while having travelled very different distances. One may be applying a concept encountered for the first time. Another may already have used the same approach professionally for several years. The provider's initial assessment establishes relevant prior learning and the training that remains necessary. Funding must not pay for skills the apprentice already possesses, and the training plan must reflect recognised prior learning. The coach's later assessment should build on that recorded starting point. It should not rewrite the initial assessment merely because a capable apprentice performs well. (DWP, *Apprenticeship funding rules 2026-27*, paragraphs 35-39.)

Suppose a marketing apprentice can already produce accurate campaign reports but has little experience interpreting customer evidence. Their first learning assignment should explore the missing reasoning, rather than require repeated production of familiar charts. The coach might ask them to compare explanations for a fall in conversion, identify a competing explanation and propose a proportionate investigation. Their existing reporting capability remains useful context. The new learning lies in developing the quality of interpretation and decision making. If unexpected prior capability emerges, the coach records the evidence and involves the appropriate programme and compliance colleagues. A marking note is a starting point for that discussion, not permission to make unsupported changes to funding records.

2.6 Build an evidence chain

Consider an apprentice who claims to have improved the reliability of a project forecast. A persuasive evidence chain would connect the original difficulty, the apprentice's analysis, the action taken and the subsequent result. The chain might begin with a dated extract showing inconsistent assumptions. It could continue with the apprentice's comparison of possible treatments, a revised method and a manager's specific account of the apprentice's contribution. A later forecast would show whether the method was used. Questions would establish why the apprentice chose that approach and what they would do if conditions changed. The strength comes from the relationship between these items, rather than from the number of attachments.

The coach should distinguish a claim from its support. “The new forecast helped the team” is a claim. A meeting record showing that the team changed its recovery priorities provides evidence of use. A comparison of forecast error over an appropriate period may provide evidence of improvement, although other changes might also explain the result. The apprentice should not be encouraged to claim sole credit for an organisational outcome they influenced only partly. Honest limits strengthen professional reasoning. They also give the coach a better basis for probing whether the apprentice understands the work.

2.7 Match the evidence to the assessment purpose

A training exercise, an assessment of learning and a final assessment submission can look similar on the screen. Their purposes nevertheless differ. A training exercise may allow extensive prompts and repeated attempts because it is designed to develop capability. A formal assessment may place limits on assistance to protect the meaning of the result. A final portfolio may permit only specified evidence types. The coach must establish the purpose before offering help, especially when a learner asks for detailed improvements to a report. Helpful support within one context can become inappropriate authorship within another.

Purpose	What the coach is deciding	Appropriate response	Record to retain
Developing understanding	Which learning gap needs attention?	Explanation, questioning and another opportunity to practise	Gap, support and learner response
Assessing an assignment	Does the evidence meet the stated criteria?	Criterion-based decision and permitted feedback	Decision and its evidence basis
Assessing workplace capability	Can the apprentice perform the required activity?	Examine attributable work and suitable corroboration	Performance, context and limitations
Preparing final evidence	Is the material admissible and sufficient for its purpose?	Apply the relevant plan and organisation's requirements	Evidence index and authenticity checks

An observation does not become unnecessary because the learner writes fluently. Nor must every knowledge requirement be assessed through observation. Proportionate assessment uses methods that expose the capability of interest without unnecessary demands. When writing is not itself the assessed capability, an authorised alternative may give a learner a fairer opportunity to demonstrate understanding. The evidence must still meet the required standard. Accessibility changes the route by which the learner can demonstrate achievement; it does not justify replacing the required capability with something easier.

2.8 Keep developmental reflection and final portfolios distinct

Reflection can help apprentices connect experience with learning, question assumptions and plan a better response. This makes it valuable throughout the training programme. It does not follow that a reflection is admissible in every final assessment portfolio. Project Controls Professional ST0845 version 1.1 provides a clear example: its portfolio supports the professional discussion and is not itself assessed; reflective accounts and self-assessment are excluded. The plan expects mapped evidence, attributable to the apprentice, and normally around 14 pieces. These are requirements of that plan, rather than a universal apprenticeship portfolio model. (Skills England, *Project controls professional EPA plan ST0845/v1.1*, 2025, pp. 6-7.)

In practice, the learner can retain a developmental reflection about challenging an unreliable cost assumption and separately select suitable workplace evidence for the final portfolio. The reflection might explain how their confidence and judgement changed. The portfolio item might contain an attributable analysis, a decision record and a specific witness statement. The coach should explain why each item has a different destination. There is no need to discourage reflection because it cannot be submitted to a particular final portfolio. Instead, help the learner understand that learning records and assessment evidence answer different questions.

2.9 Map selectively and explain the connection

A mapping table should help another person find relevant evidence quickly. It should not resemble a list of every KSB available in the programme. When an apprentice maps a report to twenty statements, the coach should ask where each statement is demonstrated and whether the evidence has sufficient depth. A single paragraph might legitimately connect several related capabilities, but a keyword match is weak support. A reference to stakeholders does not establish effective stakeholder management. The learner needs to show what they considered, did or understood in relation to the actual requirement. This makes mapping a form of professional explanation rather than an administrative counting exercise.

A useful entry identifies the criterion, the exact location, and the nature of the evidence. “Appendix B, options table: compares the implications of three responses and explains the selected recommendation” is more helpful than “whole report”. Where evidence is partial, say so. For example, the report may demonstrate analysis, while the implementation requirement still needs a workplace example. This prevents repeated approval of the same limited evidence under different headings. It also gives the learner a manageable next step. The aim is a coherent picture of capability, not the appearance of complete coverage.

2.10 Recognise knowledge without overstating skill

An apprentice project manager writes an excellent case study about a hypothetical supplier delay. They identify stakeholders, compare response options and justify a revised communications approach. This may provide strong evidence of relevant understanding and analytical judgement against the assignment brief. It does not establish that the apprentice has managed that situation in their own workplace. The coach can recognise the quality of the analysis and still identify the need for workplace performance evidence. Both statements are supportive when they are explained clearly. Trouble arises when the learner is told the entire capability is complete and later discovers that the final evidence is insufficient.

The same distinction applies in marketing. A learner may critically analyse a fictional campaign without having designed or executed a real one. Conversely, an attractive campaign asset may be authentic workplace output while giving little insight into the apprentice's reasoning. The first learner needs opportunities to apply their knowledge. The second may need focused questioning or an explanatory account that makes decisions visible. The occupational requirement and approved assessment method determine what combination is appropriate. Coaches should avoid treating essay quality as a substitute for every kind of professional performance.

2.11 Use employer evidence carefully

Employers can provide information the coach cannot obtain from an assignment alone. They see the apprentice's contribution, reliability and developing independence in real situations. The most useful evidence describes a specific event or pattern and explains how the employer knows what happened. “Excellent attitude” is too general to support a precise judgement. “During three planning meetings, the apprentice identified conflicting dates, checked them with the relevant owners and circulated corrected assumptions before the forecast was approved” gives a clearer basis for discussion. The coach can then explore the apprentice's reasoning and connect the account with other records. Employer evidence gains strength from detail and appropriate first-hand knowledge.

Under reformed assessment arrangements, employer verification of behaviours should draw on ordinary workplace processes and proportionate records. It is not intended to create an extensive additional evidence bureaucracy. The relevant plan determines how that verification supports completion. For apprentices remaining on EPA arrangements, the applicable plan's requirements continue to govern. A good provider makes these distinctions easy for employers to understand. It asks for purposeful evidence and explains what the evidence will be used for. (Skills England, *Verifying apprenticeship behaviours*, 2026.)

2.12 Ask what has changed because of the learning

Kent Business College's approach places learning in the apprentice's working life. Coaches should therefore explore the answer to the task, the learning gained, the effect on practice, the possible employer and career implications, the next action and readiness for assessment. These questions are most useful when they fit the assignment's purpose and stage. A first encounter with a concept may lead to a proposed application rather than a measurable business benefit. A learner should not invent a financial saving to make a reflection appear complete. The coach can recognise an informed intention and agree what evidence will show whether it worked. These prompts deepen learning; they should not become undisclosed additional pass conditions.

FOUNDATIONS

CHAPTER 03

Off-the-job learning and defensible records

Record the learning that actually happened.

Apply the correct start-date rules, distinguish learning from testing and administration, and build a truthful record of training activities and actual eligible time.

READ / EXAMINE THE CASES / APPLY / REVIEW

3.1 Time is part of the learning entitlement

An apprentice tells the coach that they spent a whole evening preparing an assignment. The work is thoughtful, the learning is evident and the apprentice is proud of the result. It would be easy to approve the assignment and add three hours to the off-the-job record. Yet the quality of the work does not settle whether those hours meet the funding rules. The coach needs to establish when the learning occurred, whether it was part of the agreed training, and whether the paid-time requirements were met. Recognising the learner's effort and checking eligibility are compatible responsibilities. The conversation should protect the apprentice's learning entitlement without turning an unsupported time claim into a verified record.

Off-the-job training, abbreviated here to OTJ, concerns qualifying learning. A clear record shows what happened and why its time qualifies. It also helps the coach identify insufficient release time, inaccessible resources or unrealistic study demands. Useful records support honest conversations while remaining proportionate.

3.2 Apply the right policy to the right apprentice

The apprentice's original start date is central to identifying the applicable funding rules. England moved to a published minimum total of OTJ hours for each standard from 1 August 2025. Earlier starts retain their relevant policy, including learners who return after a break in learning. For new starts, a longer or shorter delivery period does not itself change the published total; evidenced prior learning is the relevant basis for an authorised reduction. The minimum is a floor, and an apprentice may need more training to become competent. (DWP, *Apprenticeship off-the-job training guidance*, 2026, questions 52-64.)

Original start cohort	Main reference	Minimum-hours approach	Coaching implication
1 August 2022-31 July 2025	Applicable original-year rules	Full-time minimum averages six hours over the relevant period, with statutory leave treatment; part-time rules differ	Retain the original calculation and applicable duration rules
1 August 2025-31 July 2026	Funding rules 2025-26	Published standard minimum, adjusted only for evidenced relevant prior learning	Track the learner's agreed total and training still needed

Original start cohort	Main reference	Minimum-hours approach	Coaching implication
1 August 2026-31 July 2027	Funding rules 2026-27, version 3	Published standard minimum and a realistic delivery plan	Use current source/version and actual eligible delivery evidence

For an apprentice who started before August 2022, retrieve that earlier year's requirements; do not apply the later six-hour cap retrospectively. The 2024-25 rules illustrate the previous calculation: for a full-time twelve-month programme, 52 weeks less 5.6 weeks of statutory leave gives 46.4 weeks; multiplying by six gives 278.4 hours, shown as 278 in the official rounded example. Part-time apprentices used their own hours across an extended duration. Six hours was an average, not a demand that every week contain an identical amount of training. (DfE, *Apprenticeship funding rules 2024-25*, paragraphs 84-86.)

3.3 Use four questions before counting an activity

Current government guidance provides four practical tests: the training must develop new KSBs, relate directly to the apprenticeship, take place within normal paid working hours, and be an eligible activity. Writing an assignment can qualify; simply compiling a portfolio cannot. Examinations, on-programme testing and progress reviews are excluded. These distinctions concern the activity's function, rather than the name of the file or meeting. (DWP, *Apprenticeship off-the-job training guidance*, 2026, questions 12, 17 and 26-27.)

In a marking conversation, translate these tests into concrete questions. What was the apprentice learning to understand or do? Which part of the agreed programme required it? When did the learning take place, and how was the apprentice released for it? Which minutes involved learning rather than testing, routine work or administration? A clear answer makes the record easier to defend. An unclear answer identifies what needs clarification. The coach should not solve uncertainty by accepting the full claim because the learner seems sincere, or by rejecting all learning because one part of the activity was ineligible.

The 2026-27 rules locate OTJ within the practical period and normal paid working hours, excluding overtime. An exceptional outside-hours arrangement requires the apprentice's agreement and compensation, and must not account for most training. Eligible activity is planned before delivery, actual hours are evidenced, and the provider remains responsible even when someone else delivers the training. (DWP, *Apprenticeship funding* *rules 2026-27*, paragraphs 82-91.) These requirements are the boundary; the examples that follow show how a coach can apply it thoughtfully.

3.4 Watching and listening are activities, not proof of learning

A video may introduce an apprentice to a concept they have never encountered. It may also repeat familiar content, remain open while they perform another task, or be played at a different speed. The duration printed beside the video is therefore useful for planning but cannot establish each learner's actual study time. A good learning brief identifies the relevant content and asks the apprentice to do something purposeful with it. For example, after watching a short explanation of forecast assumptions, the apprentice might identify two assumptions in a supplied case and explain how each affects the result. Their response gives the coach evidence about understanding. A separate time record supports the hours claimed.

A podcast can work similarly. Imagine a marketing apprentice listening to a discussion about customer interviews during agreed learning time. The coach asks the apprentice to distinguish a leading question from a neutral one and rewrite two questions from a practice interview guide. This makes the learning visible without requiring a transcript of the entire podcast. If the apprentice listened during an ordinary unpaid commute, the resource may still have educational value, but the time does not automatically meet the paid-hours test. If they listened while carrying out routine productive work, the same period should not be presented as protected training without a valid basis. The coach explores the circumstances rather than judging the medium.

3.5 Reading should produce understanding, not a word count

Reading time varies with the material, the learner's existing knowledge and the support they need. Ten pages of familiar introductory material may take less time than one difficult table. A suggested duration helps the apprentice plan, especially where protected time must be agreed with an employer. It should remain a realistic estimate rather than a fixed number copied into every learner's actual record. The coach can ask what was read, which part was difficult and what changed in the learner's understanding. A short explanation, an annotated example or a question brought to coaching may show meaningful engagement. None requires an artificial page-by-page diary.

Where a learner needs an accessible format or more processing time, plan the support and record actual eligible activity. A longer time does not automatically suggest weak performance; a shorter time does not establish superficial learning. If a duration appears unusual, ask neutrally how it was calculated. An open correction is more useful than a tidy but unreliable total.

3.6 Separate quiz testing from the learning around it

A short quiz often sits between reading and reflection in an LMS module. That placement does not make every minute in the module the same kind of activity. A test used to establish what the learner already knows is an assessment activity. A subsequent explanation, worked example and guided attempt may provide further learning. Record those functions separately where the distinction affects eligibility. The coach should avoid counting the same quiz attempt as both assessment time and new learning time. Equally, there is no reason to discard genuine teaching simply because it follows a test.

Suppose an apprentice answers four of six questions incorrectly after studying a resource. The coach identifies a misconception about the difference between forecast expenditure and committed cost. A twenty-minute teaching activity then works through a different example and asks the apprentice to explain the distinction. The quiz result has served an important diagnostic purpose, while the teaching develops the missing understanding. These are different contributions to the learning process. The record can show both, with the testing time excluded from the eligible total and the qualifying learning separately evidenced. This also gives the next coach a useful account of what was misunderstood and how it was addressed.

3.7 Distinguish reflective learning from portfolio administration

An apprentice's reflection can involve substantial learning when it applies a new idea, examines an assumption or develops a more effective response. For example, an apprentice may compare their initial response to a case with a recently taught decision method and explain what they would change. The learning lies in the reasoning, not in the presence of the heading “Reflection”. A paragraph describing an ordinary working day may add little occupational learning. Renaming it a reflective assignment does not resolve that problem. The coach should identify the new capability being developed and connect it with the task. The time record then describes that learning accurately.

Portfolio administration is a different activity. Downloading old documents, renaming files, arranging folders and uploading evidence may be necessary, but necessity does not make the time OTJ. A practical session may contain both analytical learning and administrative collation. The coach can identify the qualifying learning component and keep the remaining minutes outside the OTJ total. This distinction becomes especially important near gateway, when a large evidence-organising task can otherwise appear to generate many additional learning hours. The final portfolio's purpose and admissibility requirements also remain separate from OTJ eligibility. A qualifying developmental reflection is not automatically an acceptable final portfolio item.

3.8 A worked learning log

The following fictional example concerns a project-controls apprentice during agreed paid learning time on 7 September 2026, from 09:00 to 11:20. The training plan includes developing understanding of forecast assumptions and applying that understanding to a case. The apprentice has not previously demonstrated the required capability. The video, reading, corrective teaching and reflection address that learning gap. Breaks, testing and administration are recorded separately. The example assumes the evidence supports these circumstances; its minutes are not standard allowances for other learners.

Time and activity	Elapsed minutes	Eligible minutes	Reason recorded
09:00-09:30: video study, with pauses and notes	30	30	New concept; active study within the planned learning task
09:30-09:55: read and annotate the case briefing	25	25	Examine assumptions needed for the application task
09:55-10:05: break	10	0	No training
10:05-10:15: short knowledge test	10	0	Testing existing understanding
10:15-10:35: corrective teaching and worked example	20	20	Address the identified misconception
10:35-11:10: analytical reflection applying the method	35	35	Develop and explain a reasoned response to the case
11:10-11:20: upload and index files	10	0	Administrative collation

Time and activity	Elapsed minutes	Eligible minutes	Reason recorded
Total	**140**	**110**	**1 hour 50 minutes of eligible learning**

The arithmetic is straightforward: 30 + 25 + 20 + 35 = 110 eligible minutes. The elapsed period contains another 30 minutes that do not qualify. At 60 minutes per hour, the eligible total is approximately 1.8333 hours, not 2.3333 hours. Use the recording system's agreed unit and rounding convention consistently, retaining the underlying minutes so that rounding does not conceal the calculation. The record should identify the relevant training-plan activity, the actual occupational requirement and the evidence location. It should also make the paid-time arrangement and apprentice identity clear. A general statement that the learner completed “the module” would not provide the same clarity.

The apprentice played a thirty-minute video faster, spending twenty-four minutes in playback and six minutes making relevant notes. Combined study time was thirty minutes. Counting the original runtime plus the notes would overstate the activity; recording only playback would omit study. Use an honest, proportionate account supported by available evidence.

3.9 What if the assignment is returned for development?

Suppose the reflection in the example is incomplete. It correctly identifies an unreliable assumption but does not explain how to test it. The coach returns the relevant criterion for development and gives a focused next step. That assessment decision does not, by itself, erase the genuine eligible learning already undertaken. The learner may have learned something important while still needing further teaching or evidence. The coach should therefore record the assessment decision and the OTJ decision separately. This avoids teaching learners that only successful first attempts count as learning.

The reverse is equally important. A high-quality assignment does not validate unsupported time. If the apprentice claims five hours but provides an account that includes routine workplace production, testing and portfolio organisation, the coach should clarify the components. They can approve the assessment criteria that are met while correcting or withholding approval of the unsupported hours. Explain the distinction in plain language: “Your analysis meets this criterion. We need to separate the learning time from the routine work before confirming the hours.” A precise explanation is fairer than a vague rejection of the whole submission.

3.10 Coaching meetings need the same discipline

A coaching appointment can include a progress review, new teaching and guided practice. The meeting title does not establish that the whole appointment is OTJ. Consider a forty-five-minute session: fifteen minutes discuss deadlines and progress, twenty minutes teach an unfamiliar analytical approach, and ten minutes support practice with a new example. If the teaching and practice meet the eligibility tests, thirty minutes may be recorded as qualifying training. The review element remains valuable but is excluded. Briefly identifying the learning objective and outcome makes the split understandable. An automatic monthly allocation would hide this distinction.

The coach's marking time is not the apprentice's training time. An apprentice may undertake planned learning using feedback explanations and examples, with that activity separately recorded. Distinguish substantive learning from stylistic editing. Formal assessment limits on assistance continue to apply; OTJ recording does not authorise support that undermines assessment integrity.

3.11 When the learner is behind, repair the plan

A growing gap between planned and completed learning should prompt a discussion about its cause. Ask whether the employer is releasing the learner, whether the workload is realistic and whether the learner can access the resources. Check what learning actually occurred before deciding what needs repeating. Then agree a manageable sequence with dates, protected time and evidence of the next completed step. A backlog is not an invitation to recreate records from memory or approve a large unsupported total. Equally, a missing upload does not necessarily mean no training took place. Establish the facts and involve programme or compliance colleagues where the records or status require correction.

For ordinary delivery models, the current rules require a plan for OTJ active learning each calendar month; different provisions apply to agreed block or front-loaded models. Missed learning may trigger a break-in-learning requirement, so coaches must escalate prolonged inactivity promptly. When actual hours finish below the original agreed plan, the rules require a signed explanation confirming the minimum has still been met. (DWP, *Apprenticeship funding rules 2026-27*, paragraphs 92-98.) These are compliance decisions supported by the coach's evidence, not matters to conceal through additional administrative assignments.

3.12 A defensible record should be easy to explain

At Kent Business College, the central apprenticeship record should connect planned activity, actual eligible time and the learning evidence. LMS completion data, attendance records, learning logs and coaching notes can contribute to that account. None is conclusive simply because it exists in a system. A timestamp shows an event; it does not alone establish attention, paid release or new learning. The coach uses proportionate corroboration to understand what happened. Rich reflections can support educational judgement, while the hours record remains a focused account of eligible activity. Avoid asking learners to reproduce the same information in several places without a clear purpose.

Before confirming an entry, ask whether another competent person could understand the training, its timing and its connection to the plan. Resolve missing facts without inventing detail. Honest records protect the apprentice's learning entitlement and help the employer understand the time used. They support the essential coaching question: what learning does this apprentice still need, and how will we provide it well?

FOUNDATIONS

CHAPTER 04

Designing assignments that produce assessable learning

A clear brief makes fair marking possible.

Design tasks that reveal learning, make criteria visible and set a proportionate challenge. Compare written assignments, case analysis, workplace products and structured reflections.

READ / EXAMINE THE CASES / APPLY / REVIEW

4.1 Begin with the judgement you need to make

A coach opens an apprentice's assignment and finds six pages about stakeholder management. The work is fluent but almost impossible to mark against the intended skill: adapting communication for different audiences. The apprentice has explained a theory but has never been asked to show a communication decision. Before asking whether the learner has written enough, ask whether the brief gave them a fair opportunity to demonstrate the required learning. A useful assignment identifies what the learner should understand or do, creates an opportunity to show it, and explains what evidence will support the decision. That sequence should be visible before work begins.

Constructive alignment connects outcomes, learning activity and assessment (Biggs, 1996). Start with the occupational requirement and the learner's development needs. Choose a task that reveals the required thinking or performance. An essay may establish understanding of communication principles; an adapted briefing, an observation and questioning may establish application. The choice depends on the claim being assessed. These original KBC practice models support task design within the applicable curriculum, qualification requirements and assessment plan.

4.2 Give the learner a clear route through the task

A well-designed brief answers practical questions. What am I learning? What must I produce? How will it be judged? What support may I use? When will I receive feedback? Include the standard version and precise KSB or qualification references, alongside plain-language explanations. A focused task normally produces clearer evidence than a brief that claims to assess half the programme. Make necessary workplace access explicit and agree it with the employer before the apprentice starts.

Brief element	What the learner needs to know	Design example
Purpose and criterion	The capability being developed and assessed	Explain why the selected audience needs a different briefing
Product and evidence	The submission and any supporting material	Two briefings, a comparison and confirmation of the learner's contribution
Conditions and support	Permitted resources, collaboration and adjustments	Company template permitted; individual analysis required
Process and next step	Deadline, feedback point and opportunity to respond	Discuss an outline before producing the final evidence

Distinguish required evidence from helpful presentation conventions. A stated word range can help apprentices plan their work, but it should not become an undisclosed competence threshold. If concise evidence fulfils the criterion, brevity alone is not a weakness. Where a qualification prescribes a limit, format or assessment condition, communicate and apply that requirement. If a local brief is unclear, clarify it consistently for everyone affected. Do not introduce an extra pass requirement while marking the first submission.

4.3 Make the command verb visible in the evidence

Command verbs describe an intellectual or practical task, but a verb alone does not define the whole standard. “Analyse” still needs an object, context and expected depth. Ask learners to analyse the causes of a schedule variance using the supplied evidence, rather than to “analyse project controls” in general. Tell them whether they should consider data quality, competing explanations and implications for a decision. Use the meaning specified by the relevant awarding organisation where one is supplied. The following distinctions are working explanations for coaching conversations, not replacements for official criteria.

Verb	What a response should make visible	Insufficient substitute
Explain	A clear account of how or why something happens	A list without relationships
Analyse	The parts, relationships and evidence that explain a situation	Description followed by an unsupported opinion
Evaluate	A reasoned judgement against relevant considerations	Naming advantages without weighing them
Demonstrate	The required action or performance through suitable evidence	Claiming to know how to do it

For example, “evaluate two scheduling approaches for this project” invites a comparison against the project's constraints and a justified conclusion. The learner may reasonably prefer either approach if the evidence supports the choice. A hidden preferred answer would undermine the task. Conversely, a confident conclusion cannot compensate for incorrect calculations or ignored constraints. Build the brief so that the learner must reveal their reasoning, including what would change their recommendation. This helps the coach distinguish understanding from rehearsed terminology.

4.4 Keep reflection proportionate to the learning

KBC's developmental approach connects an answer with learning, workplace impact, career development, a next action and readiness for apprenticeship assessment. Those dimensions should accumulate meaningfully across the learner's journey. They need not become six compulsory essays after every short video. A ten-minute explanation of a new concept might merit a short account of the concept, one application and a question. A month-long workplace improvement deserves fuller consideration of evidence, results and future action. Requiring identical lengthy reflections after every resource can produce repetitive statements which reveal little. Select prompts according to what the activity can realistically establish.

For a short LMS activity, ask: “What is the most useful idea? Explain it in your own words. Where could you apply it, and what still needs clarification?” After a quiz, ask learners to explain a misconception rather than merely report their score. For several linked resources, one integrated reflection can compare their messages and show a planned application. After a workplace trial, return to that reflection and ask what actually happened. Keep expected impact distinct from observed impact. A proposed improvement can be a thoughtful learning outcome even when employer permission or a suitable opportunity is still pending.

4.5 Brief model one: a workplace artefact with commentary

KBC-P01: Improving a project or campaign control. The purpose is to show how the apprentice applies learning to a bounded workplace task and explains their own decisions. Choose a genuine, authorised activity: improving a risk-register entry, clarifying a campaign reporting measure, or revising a stakeholder briefing. Agree the selected criterion and the learner's contribution with the coach before beginning. Submit the relevant artefact, a concise commentary and appropriate corroboration. Retain dates and version information where these help establish what changed. Redact confidential information without removing the evidence needed for assessment; arrange controlled access when redaction would make the artefact meaningless.

The learner-facing task is: “Explain the original problem and your responsibility. Show the change you made. Explain the knowledge used, why the change was appropriate, and how you checked it. Identify what improved or remains uncertain. State one next action and the evidence you will use to review its effect.” The artefact may be a small extract if that is sufficient. A commentary of approximately 500-800 words is an illustrative planning guide, not an official requirement. A recorded explanation may be suitable where the assessment conditions permit it.

The coach looks for a traceable contribution, accurate reasoning and a credible link between evidence and criterion. A team's dashboard does not establish who designed the measures. A change history, focused questioning or witness evidence may resolve that uncertainty. Improved accuracy, clearer escalation or a more defensible decision can be meaningful outcomes. Where workplace performance is required, commentary supports the practical evidence; it does not replace it. Evidence suitable for learning review must also meet the applicable rules for inclusion in an assessment portfolio.

4.6 Brief model two: integrated reflection on LMS learning

KBC-R01: From resource to professional judgement. The purpose is to establish understanding and prepare an application after a linked set of learning activities. For example, a learner watches a video explaining risk appetite, listens to a practitioner podcast about escalation and completes a short knowledge check. Ask for one integrated reflection rather than three near-identical summaries. The learner should identify the resources sufficiently for the coach to recognise them and respond to the question: “How could this learning improve a decision within your role?” Explain beforehand that personal interpretation must remain accurate and connected to the resource content.

The learner-facing task is: “Explain one idea that changed or strengthened your understanding. Compare it with your previous approach. Describe a realistic decision where it could help, including any limitation. Explain one quiz error or uncertainty that you have resolved, or identify a question you still need answered. Agree an application or further learning action with a review date.” Approximately 250-450 words may be sufficient for this example. Where the resources are introductory, the learner is not expected to manufacture evidence of workplace mastery.

A useful response might explain why a high-impact issue requires escalation even when its likelihood is low, while recognising that the organisation's thresholds must be checked. “I learnt a lot about risk and will use it in future” would give the coach too little evidence. The next step could be a supervised discussion of one risk, followed later by an updated record. The reflection's quality and the eligibility of the learning time are separate judgements. Record the actual learning activity accurately; completing the template neither validates an unsupported time claim nor proves the skill has been demonstrated.

4.7 Brief model three: critical analysis of a professional decision

KBC-A01: Choosing an approach under constraints. The purpose is to develop reasoned judgement using occupational knowledge, evidence and relevant literature. A project-controls apprentice might compare responses to a forecast delay; a marketing apprentice might compare two methods of evaluating campaign effectiveness. Set a bounded decision with enough information to support more than one plausible interpretation. Identify the relevant criterion and any required sources or data. Avoid choosing a task that depends on privileged access the apprentice cannot obtain. Where a teaching dataset is used, label it clearly and assess analytical learning rather than claiming genuine workplace performance.

The learner-facing task is: "Define the decision and its constraints. Compare two credible approaches using appropriate professional or academic sources. Analyse the available evidence, including its limitations. Recommend an approach and explain the trade-offs. Identify a condition that could change your recommendation. Propose how the employer would evaluate the approach, and identify your next development need." Approximately 1,000-1,500 words is a planning example for a substantial task; the actual requirement follows the curriculum and applicable specification.

A strong response weighs evidence instead of decorating an opinion with references. Suppose one intervention promises quicker delivery but assumes immediate availability of specialist staff. The learner should test that assumption and consider consequences if it fails. A competing option may offer a less dramatic benefit with stronger supporting evidence. Mark the quality of the argument, accuracy and appropriate use of sources, not agreement with the coach's preference. Acknowledge a well-justified conclusion that differs from your own. Speculative savings must remain labelled estimates, with the assumptions and verification method visible.

4.8 Brief model four: case study analysis

KBC-C01: Responding to a deteriorating delivery situation. The purpose is to investigate a professional problem, separate facts from assumptions and propose a justified response. Use a fictional case or a workplace case with the necessary permissions and anonymisation. In this example, a supplier milestone has slipped by two weeks, a stakeholder reports conflicting updates, and the published forecast remains unchanged. Provide the relevant schedule extract, two briefing notes and a short account of reporting responsibilities. Make deliberate gaps apparent enough to invite questions; do not hide essential information and then penalise the learner for failing to discover it.

The learner-facing task is: "Identify the central problem. Distinguish established facts from assumptions. Explain how the available information supports two possible interpretations. Identify the additional evidence needed to decide between them. Recommend immediate and longer-term actions, identifying ownership and review points. Explain how your response connects to the relevant learning and how you would discuss it professionally with the affected parties.” A concise report, structured responses or a presentation may be used when the intended criteria and conditions allow.

The learner who immediately blames the supplier has moved beyond the evidence. The learner who notes that the apparent delay might reflect an outdated baseline has identified a testable alternative. The coach should reward that reasoning while still checking technical accuracy. A case study permits exploration without exposing a real organisation's sensitive information. It can reveal analytical knowledge and decision-making in the scenario, but it cannot establish that the learner has already managed this situation at work. Plan a later opportunity to demonstrate application where the standard requires it.

4.9 Design the feedback opportunity as well as the submission

Formative work should create information that can change the next attempt. For a substantial assignment, offer an early check of the selected problem, a focused discussion of the proposed evidence, or feedback on a short analytical extract. State the limits of that support. Asking a learner to test an assumption is coaching; supplying the reasoning they must independently demonstrate changes the evidence. A final assessment decision uses the applicable criteria and conditions, including any rules on assistance or resubmission. The same topic can feature in both formative learning and summative assessment, but the purpose and permitted support must be clear.

Consider an apprentice who selects an unsuitable artefact during the planning discussion. Redirecting the task at that stage can prevent wasted effort. Once an assessment is underway, changes must follow the relevant arrangements and be recorded. Preserve a version trail where it matters. Explain whether a further submission addresses a gap, corrects an error or constitutes a new attempt. Invite the learner to explain how they used the feedback. This keeps the process connected to developing independence rather than producing a polished submission through repeated coach rewriting.

4.10 Set an appropriate demand for the actual programme

The apprentice's occupational level and the coach's professional qualifications are different matters. A coach studying at Level 7 must still judge an apprentice against that apprentice's requirements. Equally, a Level 3 assessor qualification does not mean assessment should stop at simple description. Ofqual's descriptors recognise complexity and evaluation at Level 3, increasing breadth at Level 5 and specialised critical judgement at Level 7. They describe broad qualification outcomes rather than prescribing assignment formats (Ofqual, 2026a). The examples below illustrate different professional-learning demands; they are not a universal grading ladder.

Professional-learning context	Illustrative task demand	Evidence of appropriate thinking
Level 3 assessor development	Plan and justify assessment of a defined task	Appropriate method, accurate decision and reviewed practice
Level 5 teaching development	Evaluate assessment within a teaching sequence	Learner evidence informs teaching choices and subsequent improvement
Level 7 education leadership	Critically examine an assessment system	Competing explanations, research limitations and justified strategic change

A learner at any level may need introductory exercises. Build progression deliberately: interpret a reporting measure, compare alternatives, then evaluate their consequences within a decision. The curriculum should create repeated opportunities to practise the thinking that the eventual assessment requires.

4.11 Test the brief before it reaches learners

Ask another coach to read the task and identify the evidence they would expect. If two competent colleagues interpret it differently, revise the wording before release. Then examine whether the learner has access to the resources, time, support and workplace opportunity needed. Check that approved adjustments preserve the capability being assessed and that the submission method is usable. Estimate the workload from the actual task rather than the number of pages in the brief. After marking the first group, note repeated misunderstandings and whether they arose from learning gaps or task ambiguity. Use those findings to improve the next version, while treating the current learners fairly. A strong assignment is successful when it enables a sound judgement and gives the apprentice a worthwhile reason to learn.

MARKING IN PRACTICE

CHAPTER 05

A disciplined marking process

Make the reasoning behind the decision visible.

Use a disciplined marking process to judge relevance, authenticity and sufficiency. Record what is met, what is uncertain and what the apprentice should do next.

READ / EXAMINE THE CASES / APPLY / REVIEW

5.1 Mark the learning you intended to assess

A coach opens an apprentice's assignment and sees a professional report, a careful contents page and several references. The first temptation is to reward the effort and finish with "Good work; well presented". Yet the task asked the apprentice to explain how a change request would affect an agreed schedule, and the report mostly describes a change-control process. The presentation deserves recognition, but it does not answer the central assessment question. The coach's responsibility is to identify that gap without dismissing the learning that is present. Disciplined marking starts by returning to the intended learning, the task and the relevant criteria before deciding what the work demonstrates.

This distinction matters because an assessment decision has consequences. An apprentice may use it to decide that they are ready for more demanding work, an employer may rely on it when allocating responsibility, and another assessor may later review the evidence. A mark that rewards confidence or length can therefore conceal a learning need. Equally, a low mark based on spelling, where spelling is not part of the intended outcome, can conceal occupational competence. Biggs's account of constructive alignment connects learning outcomes, learning activity and assessment; for the coach, its practical implication is to assess what the task was designed to develop (Biggs, 1996). An assignment brief should make that connection visible before the learner begins.

In this handbook, "marking" includes reading, listening, observing, questioning, judging and recording. It is broader than correcting a written document and narrower than deciding everything about a learner's overall progress. A strong assignment can provide convincing evidence for a particular criterion while leaving other skills untested. A weak assignment can reveal useful new learning and an appropriate next teaching step without yet demonstrating the required outcome. Keep those possibilities open until the evidence has been examined. The aim is a justified decision with a useful consequence for learning.

5.2 Six questions that protect the decision

Validity asks whether the evidence supports the inference you intend to make. A well-written explanation of a stakeholder meeting can demonstrate understanding of communication choices, but it may not demonstrate that the apprentice can facilitate a difficult meeting. Authenticity asks whether the evidence represents the apprentice's own contribution and understanding. Currency asks whether the evidence remains relevant to the current requirement and the learner's present practice. Sufficiency asks whether there is enough appropriate evidence for the criterion, including its breadth and conditions. Reliability asks whether a suitably prepared assessor would make a comparable decision from the same evidence, while fairness concerns an equitable opportunity to demonstrate the intended learning.

These questions overlap, but they are not interchangeable. A current workplace spreadsheet may be authentic yet insufficient because it gives no explanation of the assumptions behind its figures. An employer statement may be enthusiastic yet weakly valid because it describes general attitude rather than the specified skill. An old example is not automatically unusable, but a change in software, process or occupational expectations may require current corroboration. Reasonable adjustments should preserve what is being assessed while removing an unnecessary barrier to demonstrating it. Fairness therefore does not mean giving every learner the same format or identical support; it means applying the relevant standard through a defensible process.

Decision question	What to look for	A useful response to a gap
Does it address the criterion?	A direct connection between the required learning and the evidence	Identify the missing relationship or performance
Is it the apprentice's contribution?	Role explanation, working process and credible discussion	Ask the apprentice to explain a particular decision
Is it current and sufficient?	Relevant context, appropriate scope and enough detail	Request a specific additional example or observation
Is the judgement consistent and fair?	Shared criteria, accessible conditions and moderation where needed	Compare with an agreed example and record adjustments

No checklist substitutes for judgement, but it can make weak reasoning easier to notice. If a coach cannot explain why the evidence meets a criterion, the phrase "I know good work when I see it" is not enough. The decision should survive a colleague asking which part of the evidence supports it. Rubrics can improve the consistency of scoring, particularly when criteria and examples are well designed, although the presence of a rubric alone does not guarantee valid or reliable assessment (Jönsson and Svingby, 2007). The practical task is to make the standard intelligible and apply it to the work. That requires discussion between assessors as well as a form.

5.3 Prepare before the first reading

Begin with the assessment purpose and the correct version of the requirements. A developmental exercise, an internal summative assignment, a regulated qualification assessment and apprenticeship assessment may each involve different decision rules. Identify the task's criteria, the intended evidence and the authority for the decision. If the assignment contributes to an awarding organisation's qualification, use its approved assessment and internal quality assurance arrangements. If evidence may later support an apprenticeship assessment, consult the applicable standard and assessment plan instead of assuming that an internal portfolio can simply be transferred. Write down any uncertainty before it becomes an unspoken marking rule.

Next, read the brief as the apprentice would have read it. Check the command words, the workplace context, the expected scope and any agreed adjustment or alternative evidence route. Confirm which aspects of communication are occupational requirements and which are merely presentation preferences. Review previous feedback only to understand the learning sequence, not to let a learner's reputation predetermine the result. A coach who expects high performance can overlook a missing explanation, while one who expects difficulty can miss a genuine improvement. Preparing a short criterion sheet helps each new submission receive a fresh, evidence-led reading.

5.4 Use a series of purposeful passes

The first pass is for meaning. Read the submission without filling every margin, asking what the learner is trying to show and whether their argument is understandable. Note the broad response to the task, the main workplace example and the learner's claimed contribution. This prevents early spelling corrections from taking over the assessment. It also makes contradictions easier to see: a learner may say that consultation shaped a decision but describe an example where colleagues were informed only afterwards. Mark that as a question to investigate rather than immediately treating it as dishonesty.

The second pass is for criteria and evidence. Work through each criterion and locate the material that supports, partially supports or fails to support it. Distinguish a relevant claim from evidence for the claim, and distinguish an explanation of a method from evidence of competent use. A page reference, paragraph label, recording timestamp or observation note makes the reasoning traceable. Where a criterion has several elements, consider all of them instead of accepting the most visible one as a substitute for the rest.

Avoid awarding an attractive overall percentage that hides an essential criterion which remains unmet.

The third pass is for challenge and confirmation. Test the assumptions behind promising evidence and investigate ambiguities through an allowed follow-up method. For example, ask why an apprentice selected one risk response over another, what their own role was in preparing a joint report, or how they know a claimed improvement occurred. Use questioning to clarify and authenticate learning rather than supplying an answer for the learner to repeat. If new evidence is generated, retain a proportionate record of the question, response and resulting decision. Follow the applicable assessment rules on supplementary questioning, resubmission and reassessment.

The final pass is for the learner's next action. Choose the most significant strengths and the smallest set of improvements likely to move the work forward. Write feedback that connects a feature of the submission to a criterion and then to a practicable action. Separate mandatory changes needed to meet the criterion from suggestions for further development. Check that the decision language matches the assessment scheme and that the learner can tell whether the work is accepted, partly accepted or awaiting further evidence. Finish by considering whether teaching, access support or employer involvement is needed as well as a rewrite.

5.5 Accept what is demonstrated; identify what is missing

Consider an invented project-controls apprentice who submits a change-impact report. The brief requires an explanation of the requested change, analysis of schedule and cost implications, and a justified recommendation. The apprentice describes the change accurately and calculates a plausible additional cost, but the schedule section simply says that delivery will be delayed. The coach can recognise the demonstrated explanation and cost work while identifying the missing analysis of dependencies and available options. That does not require pretending the whole submission is either excellent or worthless. The final outcome still depends on the applicable rules, including whether all specified criteria must be achieved.

Criterion in this illustrative task	Decision	Evidence and next action
Explain the change and its purpose	Met	The opening identifies the requested output and business reason

Criterion in this illustrative task	Decision	Evidence and next action
Analyse schedule and cost implications	Further evidence required	Cost assumptions are explained; affected dependencies and schedule options are missing
Justify a recommendation	Further evidence required	The preferred option is stated but not compared with a credible alternative

The feedback can say: “Your cost explanation is clear because you identify the additional resource and state the rate assumption. To complete the impact analysis, show which dependent activities change and explain whether any float or sequencing option alters the outcome. Compare your preferred response with one realistic alternative, then explain why your recommendation best fits the constraints.” This wording protects the valid work, names the missing thinking and gives a route forward. It does not write the schedule analysis for the apprentice. It also avoids asking for a complete rewrite where a focused addition would provide the missing evidence.

5.6 Record the judgement, not just the result

A sound assessment record explains how the decision was reached. It identifies the learner and task within the organisation’s authorised system, the relevant criteria and versions, the evidence considered, the date and the assessor. It records the decision against each relevant criterion, the rationale for any incomplete outcome and the next required action. Where questioning, an adjustment or an alternative format influenced the process, record it proportionately through the appropriate channel. Keep sensitive support information separate when its detail is unnecessary for the assessment record. The record should enable another authorised professional to understand the judgement without collecting more personal information than the task requires.

Evidence quality, competence and off-the-job training are related but separate decisions. A submission can show useful learning while being insufficient for a competence claim. A well-marked report does not prove that every recorded hour qualifies as off-the-job training, and an activity that qualifies as training does not automatically demonstrate a skill. Coaches should route hours through the relevant funding and evidence controls and make achievement decisions through the assessment criteria. Avoid the shortcut “assignment passed, therefore hours approved”. Each conclusion needs its own supporting reasoning and appropriate record.

5.7 Keep developmental support and formal judgement clear

Developmental assessment helps learners see the gap between their present work and the desired standard. Sadler’s account of formative assessment emphasises understanding quality, comparing current work with that quality and taking action to close the gap (Sadler, 1989). For a coach, that means a comment is not fully useful merely because it is accurate. The apprentice needs to understand it and have an opportunity to use it. An example, a short discussion or a learner-generated revision plan may be more effective than a long paragraph of correction. Ask the learner to explain what they will change so that misunderstanding becomes visible before the next submission.

Formal assessment requires a clear boundary around that support. Do not silently coach a learner through a summative performance and then record the outcome as if it were independent. Where the rules permit feedback and resubmission, use the permitted process and retain the necessary audit trail. Where they restrict support, explain those limits in advance and provide preparation through appropriate practice tasks. Learners should know whether a conversation is teaching, clarification, evidence gathering or a formal assessment event. This transparency protects both the learner’s confidence and the credibility of the decision.

5.8 In your next coaching session

A marketing apprentice has produced an elegant campaign report with weak evidence for the claimed increase in enquiries. A colleague suggests accepting it because the learner has worked hard and is anxious about another referral. The report answers the campaign-planning part of the brief, but its evaluation compares two periods with different advertising spend and does not discuss that difference. How would you preserve encouragement while making a defensible decision? First acknowledge the demonstrated planning and the effort that made it clear. Then identify the evaluation gap and explain why the difference in spend matters to the conclusion.

A reasoned response would accept the criteria already supported, subject to the assessment scheme, and request a focused evaluation addition. Ask the apprentice what other explanations might account for the increase and which available data could strengthen or limit the claim. Agree a manageable next action, such as comparing cost per enquiry and acknowledging the limits of the comparison, without promising that these steps will necessarily prove success. Check whether the learner needs a short teaching session on evaluation rather than another unexplained referral. Record the remaining criterion, the agreed support and the review point. The humane decision is the one that combines an honest standard with a credible route to achievement.

MARKING IN PRACTICE

CHAPTER 06

Written assignments and critical analysis

Read beyond fluent prose.

Distinguish description, explanation, analysis and evaluation through worked submissions. Identify where evidence supports a conclusion and where a learner needs a more focused next attempt.

READ / EXAMINE THE CASES / APPLY / REVIEW

6.1 An answer has a job to do

An apprenticeship assignment should make occupational thinking visible. It may ask the learner to explain a process, interpret evidence, compare options or justify a course of action. Before assessing the quality of that thinking, establish whether the learner has answered the actual question. A polished account of stakeholder theory does not answer a task about handling disagreement over a project milestone. A campaign description does not answer a task about evaluating its effectiveness. Start with the relationship between the task and the answer, then assess the knowledge and reasoning within that relationship.

For this reason, useful briefs specify an authentic problem and a manageable scope. “Write about risk management” invites an encyclopaedia of definitions and gives the assessor little basis for a consistent decision. “Explain how you identified two significant risks, compare the responses available and justify your selected approach” gives the learner a clearer intellectual task. The expected depth should match the intended learning and the applicable qualification or occupational requirements. Word counts can help manage scope, but they do not substitute for criteria. A short answer that fully addresses the requirement may be more convincing than an extended report that repeatedly avoids it.

A practical first step is to ask the apprentice to complete this sentence: “The decision or explanation this assignment must help the reader understand is…” Their answer often reveals a misunderstanding before much time has been spent writing. Encourage a brief outline with a claim, supporting evidence and an explanation of why that evidence matters. Where the task requires evaluation, include alternatives, limitations and a reasoned conclusion. This structure supports the relationship between intended learning and assessment described by Biggs (1996). It should guide thinking without turning every submission into an identical template.

6.2 Recognise different depths of thinking

Description tells the reader what happened or what something is. Explanation makes a relationship understandable, such as why a particular method was selected. Analysis examines components, relationships and implications, including how a change in one part may affect another. Evaluation reaches a reasoned judgement against relevant considerations, recognising limitations and alternatives. These forms of thinking often coexist in a strong answer rather than appearing as separate sections. A learner may need a brief description so that the later evaluation has a context.

Depth of thinking	Project-controls example	What the coach should notice
Description	“The supplier delivery moved by one week.”	The event is identified, but its significance is unexplained
Explanation	“This matters because installation depends on delivery.”	A relevant causal relationship is made visible
Analysis	“The delay uses the available float and exposes the testing milestone; resequencing may protect part of the programme.”	Dependencies, constraints and implications are considered
Evaluation	“Resequencing is preferable to overtime under these assumptions, but the decision needs revisiting if access is withdrawn.”	An option is justified, with conditions and limitations

Do not assume that longer sentences or more technical vocabulary demonstrate deeper thinking. An apprentice can use straightforward language to analyse a complex decision accurately. Conversely, terms such as “strategic”, “synergy” and “critical” may conceal an absence of reasoning. Ask whether the work explains how the conclusion follows from evidence and whether a plausible alternative has been considered. Where the task requires a practical explanation, do not create an unannounced requirement for extensive academic critique. Academic depth should serve the stated criterion and occupational purpose.

6.3 Worked case: a project schedule decision

The following examples are invented for learning. The apprentice’s task is to analyse the effect of delayed supplier information and recommend a response. Four illustrative criteria are used: explain the problem and personal role; analyse implications using relevant evidence; compare feasible options; and justify a recommendation with limitations and a next action. These are teaching criteria for this case, not published KSB codes or an awarding organisation’s grading scheme. Both responses concern the same situation, so the difference lies in the thinking demonstrated. The first extract contains relevant knowledge but leaves substantial questions unanswered.

Submission needing development

> *The project experienced a delay because the supplier did not send the information when expected. I work in the project team and help with the schedule. Good communication is important because everybody needs to know what is happening. The project manager asked us to review the dates and speak to the supplier. We looked at the schedule and agreed that the supplier should send the information as soon as possible. This would help the project get back on track. There are different ways to manage delays, including adding resources, changing the order of activities and updating stakeholders. I think good teamwork is the best approach because the team can solve problems together. The supplier has now promised to improve communication. I have learnt that schedules need updating regularly and that risks should be identified early. In future, I will monitor progress more closely and make sure everyone understands the current position.*

A stronger submission

> *I updated the design-information log and identified that supplier approval would arrive four working days late. The baseline linked approval to installation, with two days of float before testing was affected. I checked this relationship with the planner; the remaining two days threatened the testing milestone. We considered overtime after delivery and bringing forward a two-day inspection of an already completed, separate subsystem. The inspection was scheduled after installation and before testing, but the planner confirmed it could run in parallel with installation. Overtime depended on specialist availability and added cost, whereas the inspection could use an already booked engineer. I recommended resequencing the inspection, subject to access approval, because it protected two days without assuming extra labour was available. The project manager approved this proposal; I did not authorise the change. The forecast remained uncertain because supplier approval was not yet confirmed. I will obtain that confirmation and review the logic with the planner before the next update. This taught me to test dependencies and resource assumptions before treating every late activity as a project delay.*

Illustrative criterion	First submission	Stronger submission
Explain problem and personal role	Partly evidenced: delay identified; contribution vague	Met: identifies the delay and the apprentice’s specific work

Illustrative criterion	First submission	Stronger submission
Analyse implications	Further evidence required: no logic or consequence shown	Met for this written task: float, dependency and milestone are connected
Compare feasible options	Further evidence required: methods listed without comparison	Met: compares availability, cost and practical constraints
Justify and identify limitations	Further evidence required: general preference and vague action	Met: reasoned choice, authority boundary, uncertainty and review action

The stronger response gives the assessor a chain of reasoning to examine. It does not merely mention float; it explains how float changes the consequence of the delay. It distinguishes the apprentice's analysis from the project manager's authority, which strengthens the clarity of the claimed contribution. Its limitation is also meaningful because an unconfirmed supplier date could change the recommendation. A written account alone would not necessarily demonstrate competent schedule management in practice, so an applicable skill criterion might require additional workplace evidence. The marking decision must remain proportionate to what this task actually assesses.

Feedback on the first response should preserve what is useful. For example: "You recognise several possible responses and the need to keep the team informed. To analyse this delay, identify the affected dependency, explain whether any float changes its effect, and compare two responses using the actual constraints. Clarify the part of the review you completed yourself. End with a justified recommendation and a specific check you will make next." This invites the learner to supply missing reasoning from their experience. It avoids replacing the apprentice's answer with the assessor's preferred solution.

6.4 Worked case: evaluating a marketing campaign

A second invented task asks an apprentice to evaluate a small paid campaign and recommend the next test. The criteria require a clear objective, an interpretation of results, consideration of alternative explanations and a justified improvement. A coach should notice whether the learner distinguishes activity measures from outcomes and whether the comparison is fair enough to support the claim. Larger numbers are not automatically better performance if the resources or audience have also changed. At the same time, a learner should not be penalised for lacking data they had no authorised means to collect. The quality of their reasoning includes how honestly they handle those limitations.

Submission needing development

> *Our campaign was successful because we had more clicks and more enquiries than before. We posted regularly and used attractive images so that people would notice our services. The campaign had fifty enquiries, which was better than the previous campaign with thirty enquiries. This shows that the new message worked well and that customers liked our approach. I helped the team by preparing some of the content and looking at the results. Social media is very important for organisations because it increases awareness and allows customers to communicate with the business. We should continue with the same approach next month and try to get even more engagement. I have learnt how useful online advertising can be and how important it is to work together. In future, I will create more interesting posts and monitor the results carefully. This will help the organisation grow and will also help me develop my marketing career.*

A stronger submission

> *The campaign aimed to generate qualified enquiries, rather than clicks alone. I prepared two advertisements and compiled the weekly results. Enquiries rose from thirty to fifty, but spend also increased from £300 to £600, so cost per enquiry rose from £10 to £12. We cannot conclude that efficiency improved. Sales colleagues classified twenty enquiries as suitable, compared with fifteen previously, although the classification process was not fully consistent. The message may have attracted a broader audience, but the larger budget and changed targeting offer other explanations. I recommend testing one message variation with a comparable audience and an agreed definition of a qualified enquiry. This should improve the usefulness of the comparison, although seasonal demand may still affect results. I will agree the classification with sales before launch and document the targeting settings. The exercise taught me to question headline growth and connect marketing measures with the organisation's actual commercial objective.*

Illustrative criterion	First submission	Stronger submission
Establish the objective	Further evidence required: success is not defined	Met: identifies qualified enquiries as the intended outcome
Interpret the results	Partly evidenced: reports an increase without examining spend	Met: calculates and interprets cost per enquiry
Consider alternative explanations	Further evidence required	Met: considers budget, targeting and data consistency

Illustrative criterion	First submission	Stronger submission
Recommend a justified improvement	Further evidence required: “more interesting” is not testable	Met: proposes a focused test and a better measurement process

The stronger answer is credible because it resists claiming more than the data supports. A coach could extend the conversation by asking how the learner would distinguish enquiry volume, enquiry quality and eventual conversion. That follow-up would develop commercial understanding without treating the absence of a sale as evidence that the learning had failed. The learner’s recommendation is also bounded: a better comparison can improve the decision without guaranteeing a particular result. In assessment, honest uncertainty may be evidence of judgement rather than a weakness. Reward the quality of the reasoning through the relevant criterion, not the positivity of the reported outcome.

6.5 Read sources as part of the argument

References should do intellectual work. They may define a concept, support a method, offer an alternative interpretation or provide evidence against which the learner tests an assumption. A paragraph with several citations can still be descriptive if the learner never explains their relevance to the workplace problem. Ask what changes in the argument because this source is present. If the answer is “nothing”, the reference may be decoration rather than evidence. A small number of well-understood sources can be more useful than a long list that the learner cannot discuss.

For tasks requiring academic work, assess source choice and use against the published expectations. Distinguish a peer-reviewed study, an academic textbook, a professional guidance document, a commercial blog and an organisation’s internal data. Each can have a legitimate role, but they support different kinds of claims and have different limitations. A general model does not establish that a particular workplace intervention caused a measured improvement. Encourage learners to connect research, context and evidence rather than simply placing a theory beside a story. Where referencing conventions are part of the task, teach and assess them explicitly without letting minor formatting errors eclipse the intended occupational learning.

6.6 Make the improvement achievable

A referral that says “needs more critical analysis” names a problem without teaching the learner how to address it. Translate the phrase into an action: compare two options, identify the assumption behind the conclusion, explain an unintended consequence, or test another interpretation of the data. Choose the action that is genuinely missing from the submission rather than asking for every possible academic feature. Ask the apprentice to show one revised paragraph before rewriting the whole document when the assessment arrangements allow developmental support. This makes the learning visible and reduces the risk of a lengthy but unchanged resubmission. It also helps the coach discover whether the obstacle is understanding, evidence access or written expression.

Avoid making feedback a competition to find the greatest number of faults. A learner who needs to understand comparison may not benefit from twenty simultaneous corrections about style. Explain the main criterion gap, recognise a concrete strength and agree a focused revision. Where writing presents an access barrier, consider the permitted support or evidence format while retaining the intended standard. If written communication is itself being assessed, make its required features clear and provide suitable teaching. The aim is accurate evidence of learning with a practicable route to improvement.

6.7 In your next coaching session

An apprentice submits a long case study containing accurate definitions and an extensive bibliography, but the conclusion simply repeats the organisation’s chosen solution. They are surprised when you explain that the evaluation criterion is not yet met. Ask them to select the most important decision in the case and describe one realistic alternative. Then ask what evidence would make that alternative preferable, and what constraint ruled it out in the actual context. Their answers will show whether the missing element is thinking that has not been written down or thinking that still needs to develop. These require different teaching responses.

A reasoned response is to agree a targeted evaluative addition with a clear purpose. The apprentice should compare the selected option with the alternative, use relevant evidence, acknowledge a limitation and explain their final judgement. Existing definitions need not be expanded unless they are inaccurate or insufficient for the task. Confirm which criterion remains open and which parts already meet the brief, following the applicable assessment scheme. Ask the learner to explain the planned revision in their own words before leaving the session. The next submission should show a stronger argument, rather than simply a longer document.

MARKING IN PRACTICE

CHAPTER 07

Reflection that demonstrates learning

Turn experience into a change in judgement.

Look for new understanding, alternatives and purposeful action. Apply the seven-question KBC frame to videos, podcasts, reading, quizzes and substantial reflective assignments.

READ / EXAMINE THE CASES / APPLY / REVIEW

7.1 Reflection should change what the learner understands

“I watched the video and found it useful” confirms a reaction, but tells the coach little about learning. “The video showed me that a risk response needs an owner; I realised our register records actions without naming who will complete them” reveals a more useful connection. The second apprentice has identified a concept and used it to notice something in practice. They still need to test the interpretation and decide what to do, but the coach now has material for a learning conversation. Reflection becomes valuable when it helps a learner examine experience, understand a change in thinking and make a more informed next move. Its value does not depend on being long or emotionally revealing.

Boud, Keogh and Walker describe reflection as working with experience in order to develop understanding and learning (Boud, Keogh and Walker, 1985). This is compatible with apprenticeship learning because experience and formal study continually inform one another. An apprentice may revisit a workplace incident after learning a concept, or use a workplace question to examine something encountered in a podcast. The coach’s role is to support this movement between experience, interpretation and future action. Reflection should not become a ritual in which every activity receives the same paragraph about confidence. Good prompts make the thinking more specific while leaving room for the learner’s own voice.

Reflective writing is one form of evidence, not a universal substitute for practice. It can reveal understanding, reasoning, uncertainty and intentions that an artefact does not show. It may also help a coach decide what to teach or observe next. However, saying “I have improved my negotiation skills” does not demonstrate the performance of those skills by itself. Equally, a reflective account that is useful during training may not be permitted within an apprenticeship assessment portfolio. Always distinguish the educational value of reflection from its admissibility under the applicable assessment plan.

7.2 Separate the activity, the reflection and the portfolio

Learners often use the word “portfolio” for everything stored in their learning system. Coaches need a more precise vocabulary. A learning activity develops knowledge, skills or behaviours through teaching, practice, study or other appropriate learning. A reflective assignment examines what the learner has understood or experienced and may itself deepen that learning. A workplace evidence item records or demonstrates an aspect of occupational practice. A portfolio organises selected evidence for a stated purpose, which may be developmental, internal assessment or apprenticeship assessment.

These categories can overlap, but the overlap needs explaining. Writing a reasoned reflection may involve new learning if the apprentice is analysing an unfamiliar problem or applying a new concept. Uploading an existing file, adding a filename and placing it in a folder is administrative collation. Official off-the-job training guidance distinguishes assignment writing that develops new skills through applying theory from portfolio compilation that does not involve new learning. It also excludes examinations and on-programme testing; time spent answering a quiz as a test must therefore be separated from genuine teaching or relearning around it. A strong reflection or a high test score does not, by itself, establish eligible hours.

For each activity, establish its educational purpose first and record eligible training through the applicable funding rules and the provider's evidence process. A planned video discussion about a new occupational concept is different from playing a familiar recording while completing routine duties. Reviewing a misunderstood concept with a tutor may involve new learning, while simply retaking a test remains testing. Where an online session combines instruction, practice and a quiz, retain enough information to distinguish these components rather than claiming the whole session by default. Do not inflate duration because a learner has produced a polished reflective account. The record should describe what actually happened, including the relevant timing and learning content.

7.3 The KBC learning-to-impact reflection

This handbook uses a seven-question framework to connect study with occupational development. It is an original practice framework for the book, not a government form or a validated psychometric instrument. Its purpose is to help coaches look for a meaningful answer, new learning and a realistic route into practice. The questions also give apprentices a way to organise their own thinking before a review. They should be adapted to the task, stage of learning and available evidence. Requiring a complete seven-part essay after every short resource would usually create repetition rather than better reflection.

Question	What the learner should explain	What the coach should look for
1. What is my answer?	The response to the assignment or learning question	A direct, relevant answer rather than a summary of everything encountered
2. What new knowledge have I developed?	The concept, distinction or understanding that is new or clearer	Accuracy and an explanation in the learner's own words

Question	What the learner should explain	What the coach should look for
3. What skill or behaviour am I developing?	What has changed in practice, or what needs to be practised	A clear distinction between demonstrated performance and intention
4. What does this mean for my employer?	Observed benefit, a problem addressed or a plausible future application	Evidence for realised impact and honest language about expected impact
5. What does this mean for my career?	A specific capability, responsibility or development direction	A credible connection without requiring a promotion or salary claim
6. What will I do next?	A feasible action, support needed and review point	An action that can be attempted and checked
7. How does this prepare me for assessment?	Relevant learning, evidence or questions still to address	Accurate links to the applicable criteria and awareness of remaining gaps

The first question prevents a reflection from drifting away from the brief. The second separates new understanding from a general statement that the resource was interesting. The third asks whether learning has reached practice, while allowing the honest answer that practice has not yet occurred. Employer and career questions connect learning with purpose without demanding instant results. The action question turns interpretation into a next step, and the assessment question develops awareness of evidence and criteria. Across the seven questions, the coach should notice the quality of the connections rather than count how many headings the learner has completed.

7.4 Use proportionate prompts for different resources

A short video can support a brief response to one important distinction. Ask the learner to explain the concept, connect it with a workplace example and identify a question or application. A longer podcast may offer several viewpoints, making it useful to ask where the speakers agree, what assumptions they make and which view fits the learner's context. A reading may require the apprentice to test a claim or compare a model with experience. A quiz can reveal a misconception that needs further teaching, but the score should not be mistaken for a complete learning account. The prompt should follow the resource's intended learning rather than force every medium into the same summary exercise.

For a short activity, three or four well-chosen sentences may provide enough evidence of understanding. For a sequence of resources on the same topic, use one integrated reflection that connects the learning across them. For a significant workplace application or module review, the full seven-question framework may be useful. These are proportionality choices, not fixed word-count or funding rules. Coaches should consider the intellectual demand, the relevant criterion and any access needs. A learner who explains the same reasoning clearly in an authorised audio response should not be required to produce an unnecessary written duplicate.

Resource or activity	Productive reflection prompt	Weak substitute to avoid
Video demonstration	Explain one decision the demonstrator made and where you could apply it	Retelling each scene or copying the transcript
Podcast discussion	Compare two perspectives and explain which assumptions matter in your workplace	Listing the speakers and saying the episode was useful
Reading	Apply one concept to a specific problem and identify a limitation	Reproducing definitions without interpretation
Quiz followed by teaching	Explain the corrected misconception and how you would recognise it in a new situation	Treating the test score or test duration as proof of competence or eligible training

7.5 Worked reflection: from a video to an informed action

Imagine an invented project-management apprentice who has watched a teaching video about stakeholder engagement. The task asks how the apprentice would distinguish informing people from involving them in a decision. A limited response reads: “The video was about communication. I learnt that stakeholders are important and that we must communicate with them regularly. This will help my employer and my career. I will use it at work and put it in my portfolio.” The response is positive and relevant, but almost every claim is too broad to inspect.

A more useful integrated reflection might read as follows. It is deliberately honest about the difference between understanding a concept and demonstrating it in practice. It also gives the coach a sensible point at which to observe development rather than assuming that learning has already produced an employer benefit. The workplace is invented, and the account is a teaching example rather than a model answer for apprentices to copy. A real learner should provide their own interpretation and context. Their reflection may reasonably reach a different conclusion if the reasoning is sound.

> *Informing means giving people information, while involving means creating a genuine opportunity for their contribution to affect the decision. I had treated the two as similar because both involve communication. The video helped me recognise that a meeting can contain plenty of information without offering any real influence. In our forthcoming handover review, the support team will be affected by the decision, but our agenda currently gives them only an update. I have not yet demonstrated that I can facilitate their involvement. My next step is to ask the meeting lead whether we can include a question about support risks before the handover decision is made. I will prepare two open questions and ask my coach to review whether they invite useful evidence rather than agreement with a preferred answer. The possible employer benefit is an earlier understanding of support problems; it has not yet been achieved or measured. This learning supports my aim of taking more responsibility for project coordination because that role requires me to recognise whose knowledge is missing. After the meeting, I will record whether the support team's contribution changed an action, raised a risk or confirmed the proposed approach. I will then discuss my questioning with the meeting lead. For assessment preparation, I can explain the difference between information and involvement, but I still need suitable evidence of my own communication practice. I will check the applicable criteria and evidence requirements with my coach before deciding what belongs in an assessment portfolio.*

The coach can accept the explanation of the concept if it meets the task's knowledge criterion. The reflection also demonstrates a thoughtful application and a feasible action plan, although it does not yet establish competent facilitation. Feedback should say this plainly: "Your distinction is clear, and your example shows why it matters. The next evidence is how you use the questions and respond to the answers. After the meeting, explain what happened and what you would change." That response recognises achievement without converting a future intention into an accomplished skill.

7.6 Read impact claims with care

Employer impact can be demonstrated, emerging, expected or not yet observable. Demonstrated impact requires appropriate supporting evidence, such as a documented reduction in rework, a clearer handover or an adopted improvement. Emerging impact may be supported by early observations while its scale remains uncertain. Expected impact is a reasoned prediction about what an action might achieve. An apprentice may also explain that an experiment did not work and identify what was learnt from it. The coach should assess the quality of the learning and evidence rather than reward only positive stories.

Career impact should be equally specific and proportionate. “This will help my career” is less informative than “This has shown me that I need more practice interpreting campaign data before I seek responsibility for the monthly performance report.” Development can include a clearer understanding of strengths, limits or interests. It does not require the learner to disclose private ambitions or claim that one activity will secure a promotion. Ask how the learning changes a capability or an informed next choice. Where the connection is not yet clear, that uncertainty can become a useful coaching question rather than a reason to invent an answer.

7.7 Support honest reflection without making it performative

Some learners quickly learn the language that appears to please an assessor. They write that every challenge built resilience, every activity transformed their confidence and every resource will improve organisational performance. This can happen when the assessment appears to reward emotional positivity rather than accurate thinking. Make it safe to say “I am not sure”, “I need to test this” or “my first approach did not work”. A reflective task should not require disclosure of trauma, personal health information or intimate feelings. Occupational learning can be examined respectfully without making private experience an assessment commodity.

Self-regulated learning involves processes such as planning, monitoring and adjusting learning, although models differ in their emphasis (Panadero, 2017). A coach can support those processes by asking apprentices to revisit their own action and compare the result with their expectation. This is more useful than repeatedly asking them to judge themselves as “good” or “poor”. Invite evidence, alternatives and the next adjustment. Where a learner lacks confidence, provide a clear example of the required depth and discuss why it works. Preserve their authorship by helping them examine their experience rather than composing the reflection for them.

7.8 In your next coaching session

An apprentice records a long period against an online package containing videos, reading, a quiz and time spent arranging files. Their reflection is thoughtful, but they have not separated the components. They also want to use the reflection as final portfolio evidence for a skill. Begin by recognising the learning visible in their explanation, then distinguish the two unresolved decisions: eligible training time and evidence of performance. Review what learning actually took place and separate testing and administrative collation in accordance with the applicable rules. A reflective account cannot make an excluded component eligible.

Next, examine the applicable assessment plan and the exact skill requirement. The reflection may help the apprentice explain their understanding, but a suitable observation, work product or other permitted evidence may be needed to demonstrate practice. Some assessment plans exclude reflective accounts or self-assessment from the assessment portfolio, so do not promise that the document can be submitted there. Agree one opportunity to apply the learning and a proportionate way to capture the apprentice’s contribution. Ask them to return to the reflection afterwards and explain what changed. The result is a more accurate training record and a stronger learning sequence.

MARKING IN PRACTICE

CHAPTER 08

Workplace evidence and portfolio building

Build an evidence trail that another assessor can follow.

Select relevant workplace products, establish individual contribution and map exact evidence locations. Keep developmental learning records and formal portfolio admissibility distinct.

READ / EXAMINE THE CASES / APPLY / REVIEW

8.1 A portfolio should make a contribution visible

An apprentice uploads a large project report and says, “This covers most of my skills.” The report contains useful material, but it was written by a team, and the apprentice’s role is not apparent. Another learner uploads a short change log with a clear annotation explaining the analysis they completed, the decision it informed and the limitations of their authority. The smaller item may provide stronger evidence for a particular criterion because the assessor can understand what it shows. Portfolio quality depends on relevance, provenance and the clarity of the contribution. File volume is a poor substitute for those qualities.

A portfolio brings selected evidence together for a stated purpose. During training, it can help an apprentice recognise progress and identify gaps in experience. For an internal assessment, it can organise material against the specified criteria. Where an apprenticeship assessment plan requires a portfolio, it may underpin a discussion or another assessment method rather than receive a separate grade itself. The applicable plan determines its purpose, permitted content and relationship with the assessment. Coaches must establish these requirements before advising a learner about what to collect.

This chapter uses simple evidence identifiers such as EV01 to illustrate an index. These identify items within the example portfolio; they are not KSB codes. Any references to criteria in the examples are descriptive labels rather than quotations from a particular occupational standard. Real portfolios should use the exact identifiers and wording from the learner’s applicable standard, assessment plan or qualification specification. Record the version alongside them, because a familiar title does not prove that two cohorts follow identical requirements. The discipline begins with knowing which requirements the evidence is intended to satisfy.

8.2 Start with opportunities, not a folder structure

Portfolio planning works best when it begins with the curriculum and the workplace. Identify which knowledge, skills and behaviours are being developed, then consider where the apprentice could reasonably apply them. Discuss opportunities with the learner and the appropriate employer representative, taking account of role, access and supervision. A learner cannot demonstrate responsibility they have never been allowed to exercise, and repeated writing cannot always compensate for a missing practical opportunity. Where experience is unavailable, escalate the curriculum or workplace opportunity gap early. Do not solve it by asking the learner to describe someone else’s work as their own.

The coach can use an opportunity plan with three questions: what will the learner do, which requirement might it address, and how could the contribution be evidenced? The answer may involve a normal work product, a focused observation or an authorised account of a decision. It should not automatically create another report for the apprentice to write. Wherever possible, capture evidence arising naturally from meaningful work and add only the explanation needed to make it interpretable. This reduces unnecessary burden while preserving authenticity. Administrative portfolio compilation should be kept distinct from training that develops new learning.

8.3 Map precisely and avoid inflated coverage

A useful evidence map connects a criterion to a particular part of an item and explains the connection. “EV01 covers stakeholder management” is usually too broad to support a decision. “EV01, meeting record, actions 3-5: shows how the apprentice captured conflicting requirements and agreed clarification actions” is more informative. The mapping should identify the evidence actually present rather than every topic mentioned in the document. One item may support several criteria, but each connection needs a reason. A report containing the word “risk” does not automatically demonstrate the skill of analysing risk.

Knowledge, skills and behaviours also require different inferences. An explanation can show that the apprentice understands a process; it does not necessarily show that they can carry it out. A work product can demonstrate a result, but its creation process and the apprentice’s contribution may require clarification. Behaviours often need evidence of how someone acted in context, and some require a pattern across situations rather than a single statement of intention. Use the wording and conditions of the actual requirement to determine what is sufficient. Avoid either extreme: accepting one vague example for everything or demanding multiple items where one sufficiently rich item is enough.

Evidence item	Illustrative requirement	Exact location	What it can reasonably show
EV01: campaign comparison	Interpret performance information	Annotated worksheet, comparison tab	The apprentice’s calculations and explanation of the result
EV02: decision meeting record	Communicate a recommendation	Agenda item 4 and agreed action	What recommendation was presented and how it informed the discussion

Evidence item	Illustrative requirement	Exact location	What it can reasonably show
EV03: focused witness account	Respond professionally to challenge	Paragraphs describing the observed exchange	Directly observed responses, within the witness's stated scope

An evidence map is a navigation aid, not an assessment decision by itself. The coach or assessor still needs to examine the underlying material and apply the criteria. If the wording of a requirement changes between versions, do not merely replace the code and preserve the old conclusion. Reconsider whether the evidence supports the revised requirement and whether the learner follows that version at all. Version control protects learners from collecting material against the wrong expectations. It also makes later review more efficient because the basis of the judgement is explicit.

8.4 Establish the apprentice's own role

Most workplace outputs are collaborative. A shared report, campaign, schedule or presentation may be entirely legitimate evidence if the apprentice's contribution is clear and the applicable assessment arrangements permit its use. Ask what they did personally, what others did, what information they used and which decisions they were authorised to make. An apprentice can make a valuable analytical contribution without holding the final approval authority. Clear boundaries strengthen the evidence because they show professional awareness as well as authenticity. Inflating a role weakens an otherwise credible account.

A short annotation can establish context without rewriting the whole project. It should identify the task and date, the apprentice's role, the relevant part of the artefact, the learning or performance claimed and the limits of the claim. It may also identify corroborating evidence or explain why confidential details have been removed. Keep the annotation in the learner's own words and use questioning to clarify it where permitted. If the coach substantially writes the account, its value as evidence of the apprentice's understanding becomes questionable. Support the learner's explanation without replacing their authorship.

An invented annotation might say: "I produced the comparison on the second worksheet using figures supplied by the campaign manager. I checked the calculation method with my supervisor and identified that cost per enquiry had increased despite higher enquiry volume. I presented this finding in the review meeting and suggested a controlled message test. The campaign manager decided whether to authorise the test. This item demonstrates my interpretation and recommendation; it does not show that I managed the whole campaign or that the proposed test improved results.” This is stronger than “I delivered a successful campaign” because the contribution and its limits can be examined.

8.5 Triangulate to resolve a real evidence gap

Triangulation means drawing on complementary evidence to strengthen a judgement. A work product may show what was produced, a focused discussion may reveal the reasoning, and a witness account may corroborate the apprentice’s role or conduct. These sources should illuminate the same relevant performance rather than repeat an unsupported claim. More documents do not necessarily increase confidence if they all derive from the learner’s original assertion. Use additional evidence to resolve a specific question about validity, authenticity or sufficiency. There is no universal requirement to gather three items for every criterion.

Consider an apprentice’s presentation about a revised project forecast. The slides show a clear explanation, but they cannot show how the apprentice responded when a stakeholder challenged an assumption. If that response is relevant to the criterion, a permitted observation or detailed witness account could help. If the criterion concerns only the accuracy of the written forecast, collecting several witness statements may add little. Choose the additional source by asking what remains unknown. A proportionate portfolio contains enough evidence for the decision while avoiding duplication that obscures the strongest material.

Witness evidence deserves careful reading. A statement such as “The apprentice is professional, reliable and good with customers” offers general praise but little inspectable performance. A stronger account identifies what the witness directly observed, when and in what context, and describes the apprentice’s actions in relation to the relevant requirement. The witness should distinguish direct observation from information supplied by others. Their identity, role and basis for commenting should be recorded through the authorised process, and any verification or declaration requirements should follow the applicable arrangements. Do not treat a witness as an assessor unless they hold that authorised role.

8.6 Worked case: a shared marketing project

An invented marketing apprentice has contributed to a campaign review with three colleagues. They upload the final report and map it against analysis, communication and professional conduct. On reading the document, the coach finds useful calculations but no indication of who completed them. The report also recommends a new campaign, although the apprentice did not have authority to approve it. Rather than reject the material wholesale, the coach asks what the apprentice personally contributed and what evidence exists for that account. The learner identifies the comparison worksheet, the meeting where they presented it and a supervisor who observed the discussion.

The revised evidence set contains the relevant worksheet with an explanation of the apprentice's calculation, a permitted extract from the meeting record and a focused supervisor account. The learner's annotation explains that another colleague collected the raw data and that the campaign manager made the final decision. The coach can now assess the analysis and interpretation against the relevant criteria and consider the witness account for the observed communication. A claim about sustained professional behaviour might still need wider evidence if the actual criterion requires it. The revised portfolio is more precise without becoming much larger. Its strength comes from a clearer chain between contribution, evidence and judgement.

Initial problem	Focused clarification	Resulting decision
Authorship of calculations unclear	Learner explains method and identifies the original working file	Contribution can be examined and authenticated
Report implies overall campaign ownership	Annotation separates analysis, data collection and approval	Claim is limited to the apprentice's actual responsibility
Slides do not show response to challenge	Supervisor describes the specific exchange observed	Additional evidence supports the relevant communication judgement

Notice what this process does not establish. It does not prove that the campaign recommendation later succeeded, because that outcome has not yet been observed. It does not convert every team activity into an individual achievement. It does not guarantee that each item is permitted in a final apprenticeship assessment portfolio. The coach must still apply the correct plan, the relevant criteria and the provider's assessment arrangements. Precision strengthens the evidence by keeping each conclusion within what the material supports.

8.7 Protect confidentiality while preserving meaning

Workplace evidence may contain client details, personal information, prices, security information or commercially sensitive plans. Discuss evidence capture with the employer through the provider's agreed process before copying material into a learning platform. Use the minimum information needed for the assessment purpose and follow the relevant access, retention and information-governance arrangements. A learner should not transfer unrestricted workplace records merely because they might be useful later. If a document cannot be shared, consider a permitted observation, controlled viewing arrangement or another appropriate evidence route. The assessment need does not remove the organisation's responsibilities for handling information.

Redaction should protect information without misleading the assessor. Label a redacted copy clearly and explain which kinds of detail have been removed where that helps interpretation. Preserve the relationship between the evidence and the learner's actual work, and maintain any authorised provenance record securely. Do not quietly replace real results with invented figures and present the document as an unchanged workplace artefact. If an illustrative reconstruction or simulation is permitted, identify it honestly and assess it within the relevant rules. A clean-looking document is not worth losing the integrity of its evidence.

8.8 Build an index another person can use

An effective index tells a reviewer what an item is, why it is included and where to find the relevant material. Include a stable evidence identifier, a meaningful title, date or period, version and the applicable mapped requirements. Record the apprentice's role and any linked corroboration where that is not already clear from the item. A short relevance note can prevent a reviewer searching through dozens of pages for one useful paragraph. Avoid filenames such as “final final new version”, which hide which item was actually assessed. Agree a simple naming approach and preserve the version that supported each recorded decision.

Portfolio review should also remove unnecessary duplication. If three documents all make the same point, select the clearest appropriate evidence or explain the different contribution each makes. Check that links open for authorised reviewers and that recordings have usable timestamps or navigation. Confirm that the index matches the actual files and that no mapping relies on an item that has been removed. These are administrative quality checks, so distinguish them from new occupational learning when recording time. Their purpose is to make evidence accessible and dependable, not to create additional training hours.

8.9 In your next coaching session

An apprentice has a substantial developmental portfolio containing reflections, completed quizzes, screenshots, shared reports and employer praise. They ask whether it is ready for apprenticeship assessment because every KSB appears in the index. Begin with the applicable assessment plan and establish what the portfolio is for, what content is permitted and whether any items are expressly excluded. Then select one mapped requirement and inspect the actual evidence, including the apprentice's role and the precise part that supports the claim. A complete index cannot compensate for an unsupported mapping. The discussion should help the learner see evidence quality as more than the presence of a code.

A reasoned response is to identify the strongest admissible evidence first and build a focused gap plan around the remaining requirements. Retain useful developmental learning in the appropriate training record even where it does not belong in the assessment portfolio. Arrange a genuine opportunity to demonstrate a missing skill instead of asking for another general reflection. Check confidentiality, provenance and access before finalising the evidence set. Explain that readiness is judged against the applicable requirements and authorised process, not promised from file volume alone. A good portfolio leaves a reviewer able to understand what the apprentice did, what it demonstrates and where its limits lie.

FEEDBACK AND SUPPORT

CHAPTER 09

Feedback that learners can use

Feedback is useful when a learner can act on it.

Connect each comment with a criterion, evidence and a manageable action. Practise conversations that preserve confidence while making the required improvement clear.

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The apprentice has opened the returned assignment and sees three words: ‘Needs more detail.’ The coach knows what is missing, but the apprentice cannot yet see it. Another paragraph may make the submission longer without making its evidence any stronger. A useful assessment conversation begins when the coach translates an expert judgement into an action the learner can understand, attempt and evaluate. That translation is a professional skill, and it has consequences for confidence, independence and progress. This chapter shows how to make feedback specific enough to change the next attempt while keeping responsibility for the work with the learner.

All scenarios in this chapter are invented teaching examples. They illustrate decisions that might arise in project management, project controls and marketing apprenticeships; they do not describe identifiable learners or actual assessment outcomes.

9.1 Feedback is a process, not a paragraph

Feedback is useful when information about present performance helps a learner make a better decision about what to do next. A carefully worded comment is only one part of that process. The learner must understand the standard, recognise the relevance of the comment, manage their response and take action. Carless and Boud (2018) describe these capacities through the idea of feedback literacy, including appreciation of feedback, judgement, emotional management and action. Coaches can develop these capacities by asking learners to compare examples, explain their interpretation and identify the change they intend to make. The practical question is therefore not simply, ‘Have I given feedback?’ but, ‘What has the learner understood and done with it?’

Research also warns against treating all feedback as automatically beneficial. Kluger and DeNisi’s (1996) meta-analysis found that feedback interventions did not improve performance in every circumstance. Hattie and Timperley (2007) distinguished feedback about the task, the process and self-regulation from comments primarily directed at the person. These findings support a cautious professional preference for information that connects a specific performance to a clear next step. They do not mean that encouragement is unimportant or that one sentence structure works for every learner. A coach can be warm, respectful and encouraging while keeping the substance of feedback centred on evidence and learning.

9.2 Use a five-part feedback sequence

Kent Business College's approach in this handbook uses a practical sequence: **evidence, criterion, gap, action and check**. This is an organising aid for coaching, not a nationally prescribed marking model or a validated psychometric scale. Begin with something the learner can locate in their work, such as a paragraph, slide, calculation or timestamp. Explain the relevant criterion and the difference between what the evidence currently shows and what the criterion requires. Give a manageable action that addresses that difference without supplying the assessed answer. End by explaining how the learner and coach will establish whether the action worked.

Element	Coach's question	Example
Evidence	What can we both locate?	'In paragraph four, you list three risks.'
Criterion	What must the learner demonstrate?	'The task requires you to justify the priority.'
Gap	What is not yet demonstrated?	'The list does not explain why one risk comes first.'
Action	What should the learner do?	'Compare likelihood, consequence and uncertainty using your project evidence.'
Check	What will count as improvement?	'We will test whether your ordering follows from that comparison.'

The sequence is deliberately flexible. Sometimes one comment can contain all five elements; sometimes a short conversation is more useful than a long annotation. A learner who has misunderstood the question may first need to restate the task in their own words. A learner who has answered the question but cannot justify a choice needs a different intervention. Use the smallest amount of information that enables the next productive action. If the learner needs a lesson, demonstration or supported practice, arrange that explicitly instead of hiding a teaching need inside repeated correction.

9.3 Separate the decision from the development advice

Begin the assessment summary with the actual decision and its scope. For example, ‘Criterion two is not yet demonstrated in this submission because the comparison does not use evidence from the workplace case.’ Then distinguish the changes required for that criterion from suggestions that would improve fluency or professional presentation. This prevents a learner from spending an evening redesigning a title page while the substantive evidence gap remains. Where the qualification or assessment process uses a particular outcome label, use that label consistently and explain it in plain language. Do not introduce unofficial pass marks or describe an apprenticeship portfolio as a distinction merely because the writing is impressive.

Development advice can extend beyond the immediate decision, but it must not disguise additional assessment requirements. A coach might say, ‘Your conclusion meets this criterion; for future management reports, placing the recommendation first would help a busy reader.’ That comment identifies professional growth without moving the threshold after submission. Similarly, an attractive employer impact statement cannot compensate for missing occupational evidence. Hours recorded for learning, the quality of an assignment and readiness for apprenticeship assessment answer different questions. Report them separately so that the learner understands precisely what has been established.

9.4 Make written comments precise and usable

Generic comments often conceal several different problems. ‘Be more critical’ may mean compare alternatives, examine the strength of evidence, question an assumption or explain a limitation. ‘Improve reflection’ may mean move beyond a description of events to explain a changed understanding and a future decision. Select the meaning that applies to this particular submission and make it visible. The learner should be able to point to the location, explain the requested operation and judge whether the revision addresses it. A bank of phrases can save time, but the evidence and criterion must be personalised to the work.

Unhelpful comment	More useful comment	What changes
‘Needs more detail.’	‘You recommend a new reporting cycle. Explain which delay in the present cycle it addresses, using one dated example.’	Adds relevant evidence, rather than length.

Unhelpful comment	More useful comment	What changes
‘Be more critical.’	‘Compare the two options against the same cost, time and service criteria, then explain why the trade-off favours your recommendation.’	Identifies the analytical operation.
‘Good reflection.’	‘You explain how the missed handover changed your understanding of stakeholder responsibility. Keep that link between event, learning and decision.’	Names a strength worth repeating.
‘Reference properly.’	‘The claim about motivation needs an identifiable source. Add the source used and explain how its finding relates to this team.’	Connects attribution with reasoning.
‘Show impact.’	‘Separate the improvement you have observed from the benefit you expect. State the evidence available and how you will check the remaining claim.’	Prevents exaggerated outcomes.
‘Not enough KSBs.’	‘The evidence supports your risk identification. It does not yet show how you monitored the response; provide a relevant record if the assessment plan permits it.’	Tests a claim rather than counting labels.

Do not annotate every sentence merely because you can improve it. Identify the few changes that most affect the criterion and explain the order in which to tackle them. Where the same problem recurs, model the diagnosis once and ask the learner to find a second example independently. A short end comment can then connect the local corrections into a pattern: ‘Your evidence is strongest when you explain why you chose an action.’ This helps the apprentice carry learning into a different task. It also reduces dependence on the coach as a permanent editor.

9.5 A worked example: reflection after a learning activity

An apprentice submits a reflection after watching a video about stakeholder engagement and completing a short quiz. The brief asks them to answer the reflection question, explain new learning, connect it to work, identify a possible employer and career benefit, and propose a next action. Their submission reads: ‘I watched the video and scored eight out of ten. Stakeholders are important and communication should be good. This will help my company and my career. I will use stakeholder management in the future.’ The activity record may support that the resources were accessed, but the reflection does not yet reveal what understanding changed or how the learner would act differently.

The coach avoids assuming that the learner learnt nothing. Instead, the assessment summary identifies the limits of the submitted evidence: ‘You have identified the topic and quiz result, but the reflection does not yet explain a new idea or show how you would use it. The brief requires an explanation of learning and a practical next step. Choose one question you found difficult, explain the idea behind the correct answer in your own words, and connect it to one stakeholder decision in your current role. Distinguish the benefit you expect from anything already observed. At our next discussion, I will ask you to explain why your proposed action fits that stakeholder.’

The revised response might explain that the apprentice had previously treated seniority as the only reason to prioritise communication. They now recognise that a person with limited formal authority can still hold information essential to implementation. They describe a maintenance colleague whose early involvement could identify an access constraint before the schedule is agreed. Their next action is to discuss that person’s information needs with their supervisor and test a revised engagement approach at the next planning meeting. The expected employer benefit is earlier identification of constraints, while the career benefit is better judgement in cross-functional working. These are plausible intended benefits, not evidence that the organisation has already saved time or money.

The coach then checks the revision against the original brief. If the learner can explain the concept and justify the action, the learning and application elements may now be demonstrated. If the brief also requires evidence of implementation, a proposed action alone is insufficient for that element. The coach records what is demonstrated and what remains to be gathered. Neither the quiz percentage nor the sophistication of the rewritten paragraph establishes occupational competence by itself. The improvement lies in a clearer account of learning, a credible application and an observable follow-up.

9.6 Make dialogue do real work

At a monthly coaching session, invite the learner to interpret the feedback before adding further advice. Ask, ‘Which comment matters most for the criterion, and what do you think it asks you to do?’ Listen for whether they understand the reasoning task, not simply whether they agree politely. If they say, ‘I need to write more’, return to the example and identify what evidence is missing. Then ask them to describe the first change they will make while you can still clarify misunderstandings. Nicol and Macfarlane-Dick (2006) link formative assessment with self-regulated learning; a practical implication is to involve learners in evaluating and directing their own next steps.

Emotion matters because assessment concerns work in which a learner may have invested considerable effort. A useful response is, ‘I can see this is disappointing, especially after the time you spent on it. Let us separate the effort from what the criterion needs us to see.’ Pause, check readiness to continue and offer a short written record of the agreed action. Avoid labels such as ‘lazy’, ‘weak’ or ‘not academic’, which turn a specific evidence problem into a judgement about identity. Equally, do not reassure someone that work meets a criterion when it does not. Respect is shown through an honest judgement and a credible route forward.

9.7 Close the loop at the next attempt

Feedback remains incomplete if no one checks what happened next. Ask the apprentice to include a short response explaining which comments they acted on, where the changes can be found and what they understand better. This is not an invitation to perform agreement; a learner may explain why they interpreted a comment differently and ask for clarification. The coach reviews the revised evidence against the criterion, records the outcome and identifies whether the learning transfers to a new example. A corrected sentence alone may show successful editing, whereas an explanation applied to a fresh scenario provides stronger evidence of understanding. Keep the follow-up proportionate to the importance of the decision.

At KBC, the monthly impact submission, normally due on the twentieth, and monthly coaching conversation provide opportunities to revisit agreed actions. The review rhythm described in this handbook is a provider approach, not a national deadline or a promise that every case follows an identical timetable. An apprentice might agree to bring one revised analysis and one example of its use at work to the next discussion. If the barrier is access to evidence or protected learning time, the action must involve the appropriate employer discussion. Do not repeatedly prescribe better reflection where the learner has had no opportunity to practise the skill. Effective follow-up checks both learning and the conditions that enable it.

9.8 In your next coaching session

Scenario. A learner returns a revised case study with excellent formatting and a longer introduction. They say, ‘I did everything you asked’, but the original comparison between two approaches is still absent. Your previous comment was, ‘Expand and improve the analysis.’ The learner is becoming frustrated and asks whether they are simply bad at academic writing.

Suggested response. Acknowledge that the earlier comment did not make the required thinking sufficiently clear. Show the learner the criterion and identify one paragraph where alternatives could be compared. Ask them to describe the two options aloud, agree common comparison criteria, and let them decide which evidence supports each option. Set a bounded revision and a check: the new paragraph should compare both options on the same grounds and justify the conclusion. Explain that this is a learnable analytical process, while making no promise about the result before reviewing the evidence. Record both the assessment decision and the learner’s next action so the next conversation begins with progress rather than another vague instruction.

FEEDBACK AND SUPPORT

CHAPTER 10

Presentations and professional conversations

Observe the evidence behind the performance.

Assess presentations and professional conversations fairly. Use timestamps, focused questions and a clear rubric to distinguish occupational reasoning from polish or charisma.

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A confident speaker finishes a polished presentation and receives enthusiastic applause. A quieter apprentice follows, pauses frequently and refers to carefully organised notes. The first impression favours the fluent presenter, yet assessment requires a different question: which learner has demonstrated the knowledge, skills and behaviours required by the relevant criteria? Professional communication can itself be an assessed capability, but charisma is not a substitute for sound reasoning or authentic evidence.

Every presentation and conversation in this chapter is an invented example. The sample brief and judgement table illustrate an on-programme learning assessment; they do not reproduce an awarding organisation's rubric or replace an apprenticeship assessment plan.

10.1 Establish what the method is assessing

A presentation may assess occupational analysis, communication, reflective learning or several of these together. A professional conversation may explore how the learner reasons about a decision and how far the evidence is genuinely their own. Before the session, identify the exact criteria, permitted method, expected evidence and role of questioning. Explain what the learner may bring, how the session will be recorded and what will happen afterwards. Where an awarding organisation or apprenticeship assessment plan specifies timing, resources or conditions, those requirements govern the assessment. A locally designed coaching activity can be flexible, but it must not be presented as equivalent to a formal assessment conducted under different conditions.

Separate the learning purpose from the judgement purpose. A rehearsal can include interruption, modelling and immediate coaching if the learner knows that this is practice. A summative assessment requires the conditions authorised for that assessment, including any restrictions on prompting or supplementary evidence. Moving between these purposes without explanation makes the record ambiguous. If you pause an assessment to teach a concept, document the intervention and consider what this means for the validity of the resulting evidence under the applicable rules. Being supportive does not require disguising coached performance as independent demonstration.

10.2 Design a brief that produces assessable evidence

A strong brief tells the learner what decision or account they must present and why it matters professionally. It does not merely request a number of slides about a broad topic. For example, an on-programme project controls task might ask the learner to explain a reporting problem, compare two responses, justify a recommendation and describe how its effect will be evaluated. Where communication is assessed, define the relevant features, such as organising the argument for the stated audience and explaining a technical point accurately. Do not add aesthetic preferences, expensive software or a particular accent as hidden requirements.

Brief element	Practical requirement	Evidence expected
Professional situation	Explain the reporting problem and your role.	Context with a clear boundary around personal contribution.
Analysis	Compare two feasible responses.	Common criteria, relevant evidence and acknowledgement of limitations.
Recommendation	Justify the preferred response.	A conclusion that follows from the comparison.
Learning and impact	Explain changed understanding and intended or observed benefit.	Distinction between learning, action and outcome.
Next steps	Set an action and evaluation method.	Ownership, timing and a realistic way to check progress.

An example time allocation might be an eight-minute presentation followed by a six-minute discussion for a local practice activity. The purpose of specifying it is to make preparation manageable and evidence collection comparable. It is not a recommended universal duration and must not be substituted for a formal assessment requirement. Tell the learner whether a small overrun is a coaching matter or has an assessment consequence under the relevant rules. Offer an accessible written brief and an opportunity to clarify the task before preparation begins.

10.3 Prepare access and conditions before the session

Ask the learner whether an agreed adjustment or practical arrangement is needed, using the organisation's normal process. A quieter room, accessible slides, appropriate assistive technology or a planned break may remove an irrelevant barrier, depending on the task and applicable rules. Extra time, an alternative response format or another change to formal assessment conditions may require specific approval. Agree the arrangement before assessment where possible and record its purpose without circulating unnecessary personal information. An adjustment should enable the learner to demonstrate the intended competence, while preserving the assessment requirements. Do not assume that a confident learner needs no support or that an anxious learner lacks occupational understanding.

For remote sessions, check audio, visibility of shared evidence and the learner's access to the required materials. Explain what happens if the connection fails so that a technical interruption is not treated as silence or lack of knowledge. If recording is necessary, use the approved process for informing participants, controlling access and retaining the file. Employer information should be anonymised or presented through an authorised alternative where confidentiality requires it. A recording does not remove the need for assessment notes; reviewers still need to locate evidence and understand the judgement.

10.4 Listen with a disciplined observation record

Write down what the learner says or does before interpreting its significance. 'At 03:20, compares update frequency but gives no cost comparison' is more useful than 'Weak business case'. The first note allows another assessor to locate the observation and consider whether it supports the judgement. Use timestamps for recordings and slide or document references where available. Distinguish direct observation, the learner's claim, evidence they present and the assessor's inference.

Reference	Observation	Assessment implication	Follow-up
Slide 2; 01:10	Explains a five-day reporting delay using a dated example.	Relevant context is demonstrated.	Confirm which work the learner completed.
Slide 4; 03:20	Compares frequency for both options but costs only one.	The comparison is incomplete.	Ask how cost affects the recommendation.

Reference	Observation	Assessment implication	Follow-up
Slide 6; 06:05	Predicts fewer late decisions without a baseline.	Intended benefit is plausible; achieved impact is unproven.	Ask what would be measured.
Discussion; 10:15	Describes own data checks and distinguishes a colleague’s dashboard work.	Supports a bounded account of personal contribution.	Cross-reference the permitted supporting evidence.

Keep notes respectful because assessment records may be seen by learners and reviewers. Avoid comments about appearance, personality or presumed motivation unless a defined occupational criterion makes a particular observed behaviour relevant. A note that someone ‘looks nervous’ rarely helps establish competence. A note that the explanation becomes inaudible at a key point identifies an evidence problem that can be addressed through an appropriate clarification. Where communication is assessed, judge its effect against the criterion: could the intended audience follow and use the message? Clear signposting, accurate explanation and responsive listening may matter much more than polished performance.

10.5 A complete worked presentation judgement

Consider an apprentice asked to recommend an improvement to a project’s weekly reporting process. The learner’s presentation explains that late updates have delayed two decisions, but makes clear that this is a small local sample. They compare a shared update form with an automated dashboard and prefer the form as a short pilot. Their slides use a real-looking but invented dataset, with names and commercial details removed for the exercise. They explain that they designed the collection fields while a colleague created the visual report. During delivery they pause twice, lose their place briefly and then recover using notes.

The strongest section explains why the team’s current data definitions produce inconsistent progress reports. The learner connects this problem to a concept studied in the programme and describes how they changed their own checking practice. The options comparison considers speed and ease of use, but it does not address staff effort for maintaining the form. The conclusion predicts a twenty per cent improvement in reporting timeliness without explaining where that figure comes from. The proposed next step is to run a pilot, although ownership and the evaluation date are not yet clear.

Local criterion	Evidence available	Decision on this evidence	Required next step
Explain the problem using relevant evidence.	Two dated examples and an explicit sample limitation.	Demonstrated for this practice brief.	Retain the limitation in the final account.
Compare feasible options using common criteria.	Both options compared on speed and usability; effort incomplete.	Not yet demonstrated fully.	Compare staff effort for both options and revisit the conclusion.
Explain learning and personal contribution.	Changed checking practice; own work distinguished from colleague's.	Demonstrated in the presentation and discussion.	Cross-reference the relevant supporting record.
Justify impact and a realistic next step.	Unsupported percentage and an incomplete pilot plan.	Not yet demonstrated fully.	Remove or substantiate the forecast; specify ownership and evaluation.

The appropriate summary is not an average of the rows unless an authorised marking scheme explicitly requires one. The coach records which criteria are demonstrated and which remain unmet under this local brief. If all required criteria must be demonstrated, attractive delivery cannot compensate for the incomplete comparison. Nor should the learner lose credit for brief pauses that did not prevent the audience from understanding the account. The current evidence supports learning and contribution, while the impact claim and action plan need further work. Any later reassessment follows the relevant programme or awarding requirements, rather than an improvised promise of unlimited attempts.

10.6 Question for reasoning and ownership

Questions can clarify evidence, explore reasoning and establish the boundaries of personal contribution. A neutral question such as, 'What led you to choose those comparison criteria?' allows the learner to explain their judgement. 'You should have considered staff time, should you not?' supplies the missing direction and may contaminate a formal assessment if that prompting is not permitted. Plan core questions linked to criteria, while retaining appropriate follow-up questions for the evidence presented. Give reasonable thinking time and avoid interpreting speed of response as a measure of understanding. Record significant questions and responses so that the final judgement does not depend on an undocumented impression.

Useful ownership questions include, 'Which part did you complete personally?', 'What changed between the first and final version?' and 'What would you do differently if the constraint changed?' These invite explanation without beginning with an accusation. Where the learner cannot answer, explore whether the difficulty concerns memory, language, anxiety or an actual evidence gap before deciding what it means. Further corroboration may be appropriate if the assessment process permits it. Do not assume that a hesitant answer proves plagiarism, or that a fluent answer establishes authenticity conclusively. Ownership is a judgement based on the available evidence and the relevant assessment procedure.

10.7 Give spoken feedback without ambushing the learner

Move from the public presentation setting to an appropriate private conversation for individual assessment feedback. Explain the decision plainly, then offer specific evidence and a manageable route forward. For the worked example, the coach might say, 'Your explanation of the inconsistent data definitions was clear, and you distinguished your contribution from your colleague's. The comparison is not complete yet because we have staff effort for only one option. The predicted improvement also needs a basis, or it should be described without that number. Let us agree how you will complete the comparison and define the pilot's evaluation.'

If the learner says, 'I was terrible because I stumbled', respond to the criterion rather than offering general reassurance. You might say, 'You paused, used your notes and continued; I could follow the explanation. The present evidence gap is the comparison, so that is where our assessment action sits. For your professional development, we can also practise a short signpost between slides four and five.' Ask the learner to explain the required revision in their own words. This checks that the emotional experience of presenting has not obscured the substance of the feedback. An optional rehearsal can then support confidence without changing the assessment decision.

10.8 Connect practice to apprenticeship assessment carefully

Presentation practice and professional conversation can help learners organise evidence, explain decisions and recognise the limits of their claims. They should also support flexible understanding, so that the apprentice can discuss a different example or respond to an unfamiliar question. Rehearsing one script until it sounds fluent may improve delivery while leaving reasoning fragile. Use varied practice questions and encourage the learner to connect answers to their own evidence. When discussing end-point or other apprenticeship assessment, use the current assessment plan applicable to the apprentice and distinguish preparation from an official assessment outcome. A coach’s judgement that someone is progressing well is not a guarantee of a particular grade.

KBC’s monthly coaching and approximately ten-weekly review rhythm can create opportunities to revisit speaking confidence, evidence quality and workplace application. These are provider routines described for coordination, not national rules governing presentation assessment. A learner may bring one short evidence explanation to coaching and later discuss its application with the employer at review. Where the role does not provide an opportunity to demonstrate the required competence, identify that gap early and plan a legitimate opportunity. Do not manufacture a workplace outcome simply to complete a presentation narrative. The strongest preparation combines authentic experience, accurate evidence and the ability to explain professional judgement.

10.9 In your next coaching session

Scenario. One learner speaks confidently and claims that their campaign doubled enquiries, but cannot identify the source of the figures or explain their own contribution. Another uses notes and speaks slowly, yet can show the calculation, explain its limitations and distinguish their actions from the team’s. A colleague says the first presentation ‘felt much more like distinction work’.

Suggested response. Return to the actual criteria and review the evidence from both presentations independently. Locate the first learner’s impact claim and record what remains unverified, then follow the permitted process for clarification or further evidence. Identify the second learner’s demonstrated reasoning without treating pace or note use as defects unless the assessment conditions make them relevant. Discuss the difference between an impression of confidence and the evidence required for a grade with the colleague, using standardisation or internal quality assurance where appropriate. Give each learner feedback on their own submission and avoid ranking them against one another. The resulting judgement should be explainable through the standard, the conditions and the evidence.

FEEDBACK AND SUPPORT

CHAPTER 11

Fair assessment, inclusion and integrity

Remove barriers while preserving the standard.

Plan accessible assessment, protect confidentiality and investigate authenticity proportionately. Use human judgement and agreed processes when technology or authorship raises questions.

READ / EXAMINE THE CASES / APPLY / REVIEW

Fairness is visible in the small decisions a coach makes while reading, listening and questioning. It appears when a learner's occupational reasoning is recognised despite imperfect prose, when a polished submission is examined with the same care as a hesitant one, and when an agreed adjustment removes an irrelevant barrier. It also appears when a coach protects the integrity of a decision rather than overlooking missing evidence out of sympathy. Inclusion and valid assessment belong together because both depend on understanding what the assessment is actually intended to establish. This chapter offers a practical way to recognise barriers, preserve standards and respond proportionately to authenticity concerns. Its scenarios are invented composites for professional learning, with no identifiable learner information.

11.1 Begin with the competence, then examine the barrier

Start by identifying the knowledge, skill or behaviour that must be demonstrated. Then ask whether the assessment method introduces a difficulty that is essential to that competence or incidental to it. If the criterion concerns the accuracy of a scheduling analysis, an unnecessarily dense written brief may create a reading barrier without improving the test of scheduling knowledge. If the criterion concerns writing an accurate professional report for a defined audience, the written product itself is part of the competence being assessed. This distinction helps the coach consider support without casually replacing one method with another. The relevant qualification, awarding organisation and apprenticeship assessment requirements determine which adjustments or alternatives are permitted.

An adjustment is not an invitation to lower the standard or supply the learner's answer. Its purpose is to enable access to the opportunity to demonstrate the required competence. Ofqual's General Conditions, including Condition G6 on reasonable adjustments, provide relevant requirements for regulated awarding organisations; coaches must use the arrangements applicable to their qualification and assessment (Ofqual, 2026b). An accessible brief, suitable assistive technology or a planned arrangement for the assessment environment may be appropriate, depending on the learner and the task. Other changes, including additional time or an alternative response method in a formal assessment, may require approval through a specific process. Establish that process early and record the authorised arrangement. A helpful coach combines flexibility about avoidable barriers with clarity about what the evidence must still show.

11.2 Keep assessment criteria free from hidden preferences

Professional preferences can become invisible marking criteria if they are not examined. A coach may favour a particular writing style, software package, accent, presentation manner or kind of workplace example. Those preferences should not determine an outcome unless they correspond to an explicit and relevant requirement. The learner who uses a small organisation’s simple spreadsheet may demonstrate excellent judgement, while a learner with access to sophisticated software may provide little explanation of their decisions. Assess the quality and sufficiency of the evidence in its context. Where a task depends on an opportunity the employer cannot provide, address the opportunity rather than marking the apprentice down for lacking organisational resources.

Potential bias	Better assessment question	Practical check
Polished language implies strong understanding.	Does the learner explain and justify the occupational decision?	Examine reasoning and ask a permitted clarification question.
A senior job title implies greater competence.	What did this learner actually do and demonstrate?	Bound the individual contribution.
A large project is stronger evidence.	Is the example sufficiently complex for the criterion?	Judge complexity and responsibility, not prestige.
Confident speech implies readiness.	Is the account accurate, authentic and supported?	Cross-reference evidence and limitations.
A familiar cultural style is more professional.	Can the intended audience understand and use the communication?	Apply the stated criterion consistently.

Fair assessment also requires attention to whose experiences appear in examples and briefs. Avoid assuming that every learner works in a large office, has management authority or shares the same cultural references. Give enough context for case studies to be understood without insider knowledge unrelated to the learning aim. Where a learner’s example comes from a different sector, explore its occupational relevance before dismissing it as unfamiliar. Professional challenge remains appropriate: cultural sensitivity does not require accepting unsupported claims or overlooking harmful conduct. The task is to distinguish a relevant standard from an assessor’s habit or preference.

11.3 Assess language where it belongs

Language can affect whether evidence is understandable, but every spelling error is not automatically an occupational competence failure. If the criterion requires an accurate written report, assess the features specified by that requirement and explain their professional consequence. If the criterion primarily concerns technical understanding, identify the knowledge demonstrated and consider whether clarification is permitted where expression is unclear. Development feedback on writing can be provided separately without silently adding new hurdles. Tell the learner which changes affect the assessment decision and which support future communication. This distinction protects both access and the integrity of genuine communication requirements.

For example, a learner’s risk analysis contains several grammatical errors but accurately compares consequences and justifies a response. The coach may recognise the analytical evidence while recommending a proofreading strategy for professional use. A different report confuses ‘higher than’ and ‘lower than’ in a way that reverses a cost conclusion. That wording now affects the accuracy of the occupational message and needs to be addressed as such. The distinction is functional, not cosmetic: what can the intended reader understand and act on? Where there is uncertainty, use the authorised assessment process and seek internal quality assurance rather than inventing a personal threshold for acceptable English.

11.4 A worked adjustment decision

An apprentice has an agreed support plan and uses text-to-speech to read learning materials. A local assignment asks them to analyse a delay in a project and justify a response, with no separate criterion requiring unaided reading. The learner asks to hear the brief through their usual technology and submit a spoken explanation alongside the required evidence. The coach first confirms the assessment purpose and checks which arrangements are permitted for this particular task. Access to the brief and replacement of the response method are treated as separate questions, because they may have different implications. No assumption is made that an arrangement allowed in teaching is automatically permitted in a formal assessment.

If the applicable process permits the spoken explanation, the coach agrees how it will be captured, linked to criteria and retained. The learner must still explain the cause, compare relevant options and justify the response independently. If a required written product is itself being assessed, the coach instead explores authorised support that preserves that written requirement. The decision and its rationale are recorded in the appropriate confidential system, with only necessary information shared with those implementing the arrangement. Feedback then addresses the evidence in the same substantive terms used for other learners. The adjustment changes access, while the criterion remains the anchor for the judgement.

The coach should not diagnose the learner or demand an informal account of medical history to satisfy personal curiosity. Listen to the barrier described and follow the organisation’s process for identifying needs, obtaining relevant information and arranging specialist input where appropriate. A learner may also experience a temporary difficulty, such as fatigue, bereavement or an injury, without having a long-standing support plan. Respond through the relevant support and assessment procedures rather than improvising a private exemption. Explain what can be agreed now, what requires a further decision and how the learner can access support. This creates a predictable process and prevents disclosure from becoming the price of respectful treatment.

11.5 Be explicit about legitimate assistance and authorship

Apprentices rarely work without support: they consult colleagues, use reference material, receive teaching and use digital tools. Authenticity therefore does not mean that a learner has received no assistance. It means that the submitted evidence accurately represents the learner’s own contribution and satisfies the conditions of the assessment. A clear brief should explain permitted collaboration, use of sources, proofreading, digital assistance and any declaration requirements. If artificial intelligence tools are permitted for some purposes, distinguish support for learning from production of assessed work on the learner’s behalf. Apply the actual policy and assessment conditions, since permissions differ across tasks and qualifications.

Example of assistance	Main question	Appropriate boundary
A tool explains an unfamiliar concept.	Can the learner understand, check and use the explanation?	Follow task permissions; verify claims and acknowledge use where required.
A colleague describes the project context.	Is the source clear and the learner’s analysis their own?	Attribute contextual input and distinguish personal contribution.
A tool rewrites the assessed analysis.	Whose reasoning and expression are being assessed?	Do not present generated reasoning as independently produced work.
A proofreader flags unclear sentences.	Does the permitted support preserve the assessed competence?	Keep support within the task’s rules and declaration requirements.

Example of assistance	Main question	Appropriate boundary
A tool invents a workplace example or result.	Is the evidence truthful and authentic?	Fabricated experience or outcomes cannot evidence real occupational performance.

Consider a marketing apprentice who asks a tool to generate an outline for comparing campaign options. Whether that is permitted depends on the assignment rules, but the learner still needs to select appropriate evidence, evaluate the options and explain the conclusion. The position changes if the tool supplies the comparison and the learner submits it as their own assessed reasoning. It changes again if the tool invents conversion figures or employer feedback, because the evidence is now false. Coaches should teach learners to preserve a transparent account of assistance and to verify sources and calculations. Avoid treating every use of a tool as identical, while remaining clear about the boundaries of authorship and truthful evidence.

11.6 Investigate concerns without turning suspicion into proof

A sudden change of style, an inaccurate reference or an answer the learner cannot explain may justify further enquiry. None of these observations alone proves misconduct, and automated text-detector scores should not be treated as sole proof of authorship or deception. Liang and colleagues (2023) identified unfair misclassification of non-native English writing in the detectors and datasets they studied; that historical finding should not be generalised to every current system or language, but it illustrates why a score requires caution. Begin by identifying the concrete concern and reviewing the assessment conditions and local procedure. Invite the learner to explain their process, sources and contribution in a respectful conversation. Relevant evidence may include drafts, version history, working notes and responses to permitted questions. Reach a decision through the authorised process, taking account of the whole evidence rather than a single signal.

A useful opening is, ‘This section uses an approach that does not appear elsewhere in your work, and I cannot trace one of the references. Please talk me through how you developed it and which sources or tools you used.’ This names an observable issue without declaring guilt. If the learner acknowledges assistance, establish what happened and how it relates to the stated rules. The response may involve clarification, further assessment, teaching about attribution or a formal integrity process, depending on the facts and applicable policy. Do not promise an outcome in advance or use an informal conversation to bypass a required procedure. Keep a factual record and explain the learner’s opportunity to respond and access the relevant review or appeal route.

11.7 Protect confidential evidence and sensitive disclosures

Workplace evidence often contains information about colleagues, customers, budgets and commercial decisions. The learner should understand how to select, anonymise or obtain an authorised alternative to material that should not be shared. Removing a name may be insufficient if the surrounding details still identify a person. Use the organisation's approved systems and access arrangements for submissions, recordings and feedback. Do not paste identifiable learner records or confidential employer material into an unapproved public tool. A professional evidence discussion should preserve the information needed for assessment while limiting unnecessary exposure.

Sometimes an assignment or reflection reveals a safeguarding concern, distress or possible harm. The coach should respond calmly, listen without conducting an amateur investigation and follow the organisation's safeguarding route. Explain the limits of confidentiality in a sensitive, age-appropriate way rather than promising secrecy. Record the relevant facts through the approved process and share them with the appropriate people, keeping ordinary marking comments free from unnecessary sensitive detail. The assessment decision and the support response may both need attention, but they serve different purposes. A disclosure should never be treated as an interesting illustration to circulate in standardisation or future teaching.

11.8 Use quality assurance to test fairness

Fairness improves when assessors make their reasoning visible to colleagues. Bring anonymised examples to standardisation and compare how criteria were interpreted, especially where language, presentation style or adjustments may affect impressions. Discuss the evidence before revealing the original outcome where practical, because an existing label can anchor later judgements. Internal quality assurance can examine consistency, the sufficiency of records and whether the agreed assessment conditions were followed. It should not become a mechanism for pressuring assessors to produce favourable outcomes. A defensible disagreement is resolved by reference to the criteria, evidence and applicable procedure.

Keep the learner informed about how to raise a concern or appeal an assessment decision through the relevant route. A request for review is not evidence of a poor attitude and should not affect later marking. Equally, a complaint about tone does not automatically establish that the assessment outcome is wrong; both the communication and the evidence can be reviewed. The coach's professional task is to remain open to correction while preserving a clear evidential record. When a decision changes, explain what new evidence or interpretation led to the change. This models the same reasoned, accountable judgement that apprentices are expected to develop.

11.9 In your next coaching session

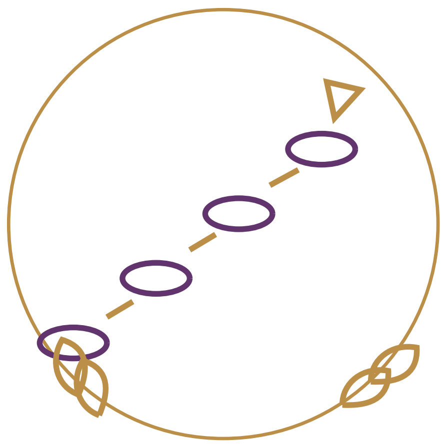
Scenario. A learner submits unusually fluent work and an automated detector labels it as likely generated. The learner says they used a permitted language tool to check sentences and offers working notes, but becomes upset when asked whether the assignment is ‘really theirs’. The technical analysis includes one reference that cannot be located.

Suggested response. Clarify that the concern will be examined through evidence and the applicable process, rather than decided by a detector score. Review the task’s actual rules, the learner’s declaration, the working notes and the specific untraceable reference. Ask neutral questions about the development of the analysis and distinguish permitted language support from assistance that would replace assessed reasoning. Consider whether any agreed adjustment is relevant without assuming that disclosure proves or disproves authenticity. Document the findings, explain the next step and preserve the learner’s opportunity to respond or seek review. The aim is a fair judgement about this submission and clear learning about truthful, transparent use of support.

FEEDBACK AND SUPPORT

CHAPTER 12

When progress slips: action plans and referrals



Diagnose the barrier before writing the plan.

Agree a realistic recovery route with the apprentice and employer. Recognise when learning support, occupational expertise, wellbeing support or safeguarding referral is needed.

READ / EXAMINE THE CASES / APPLY / REVIEW

An overdue assignment is a signal to investigate, not a complete explanation of what has happened. One apprentice understands the subject but has lost protected learning time; another attends every session yet cannot apply the underlying concept. A third has useful workplace evidence but does not know how to organise it, while a fourth is dealing with circumstances that require support beyond the coach's role. These situations may look similar on a dashboard and need very different responses. This chapter shows how to diagnose the immediate barrier, agree a proportionate recovery plan and involve the right people. The examples are invented composites, designed to teach professional judgement without drawing on identifiable learner histories.

12.1 Establish what is behind, and against which plan

Begin by checking the current agreed training plan and the evidence available. Identify whether the issue concerns learning, workplace practice, assignment submission, assessment, recorded off-the-job training or several of these. A missing upload does not necessarily mean that no learning occurred, while a complete set of uploads does not establish that the required learning has taken place. Compare planned and evidenced progress, including any agreed changes and the learner's actual opportunity to practise. Check whether an assessment decision is awaiting feedback from the provider before describing the learner as late. A fair diagnosis separates the learner's responsibility from delays or barriers created elsewhere in the system.

The label ‘behind’ should lead to a specific statement. For example, ‘The learner has not yet demonstrated the options comparison required in the current assignment, and two planned learning sessions were displaced by operational work.’ This statement identifies both an evidence gap and an opportunity gap. It supports an action plan more effectively than ‘Poor engagement’. Ask what the missing work would enable next, because some gaps block later learning while others are administrative. Prioritise the prerequisite knowledge and occupational opportunities that matter most for successful progression.

12.2 Explore capability, opportunity, wellbeing and participation

Use four practical lines of enquiry: capability, opportunity, wellbeing and participation. They are prompts for a coaching conversation, not diagnostic categories or a scoring instrument. Capability concerns whether the learner understands the task and can perform the relevant thinking or skill. Opportunity concerns time, access, supervision, resources and chances to practise. Wellbeing concerns whether personal circumstances or distress are affecting learning and whether specialist support is needed. Participation concerns the observable pattern of attendance, communication and action, which should be explored without assuming that its cause is poor motivation.

Line of enquiry	Respectful question	Likely first response
Capability	‘Which part can you do independently, and where do you get stuck?’	Targeted teaching, modelling or supported practice.
Opportunity	‘Which planned learning time or workplace opportunity has been available?’	Employer discussion and a realistic opportunity plan.
Wellbeing	‘Is there anything affecting your ability to study that you would like support with?’	Listen, establish immediate safety and use the appropriate support route.
Participation	‘What has made it difficult to attend, reply or complete the agreed action?’	Clarify barriers, expectations and a manageable first commitment.

A learner may have more than one barrier. Someone who has missed several sessions may now lack prerequisite knowledge and feel embarrassed about returning. Simply telling them to attend more reliably will not repair the knowledge gap. Conversely, repeated explanation of the topic will not create protected learning time when the employer keeps scheduling operational duties. Ask the learner to describe a recent attempt in practical terms: when they started, what they had available, where progress stopped and what happened next. This makes the conversation concrete without turning it into an interrogation. Summarise your understanding and invite correction before agreeing a plan.

12.3 Triage support before building a timetable

If there is an immediate concern about safety or serious harm, follow the organisation’s urgent safeguarding or emergency procedure. Contact the appropriate emergency service where the situation requires it, using the learner’s actual location and the organisation’s established route. The coach’s role is to respond, record relevant facts and involve the appropriate people, not to conduct a clinical assessment or investigate an allegation alone. Where there is a safeguarding concern without an immediate emergency, use the designated safeguarding route promptly in accordance with policy. Explain the limits of confidentiality and avoid promising that information will remain solely between coach and learner. The assignment timetable can be considered once the immediate support response is under way.

Not every difficulty is a safeguarding issue. A learner may need help with study organisation, literacy, numeracy, a technical topic, assistive technology or access to a workplace task. Match the referral to the need and explain why the additional person can help. Agree what information will be shared and follow the organisation's confidentiality and information-sharing process, recognising that safeguarding duties may require a different approach from routine support. A referral should contain enough relevant detail to support action, while avoiding unnecessary personal history. The coach remains responsible for coordinating learning within their role rather than assuming that making a referral ends the matter.

12.4 Build the plan with the learner and employer

A recovery plan should answer what needs to change, who will act, when it will happen, what support is available and how success will be recognised. Keep the first cycle short enough to review meaningfully, usually focusing on a small number of priorities. 'Catch up with all outstanding work' is an aspiration, not a workable action. 'Compare the two proposed reporting options against cost, timeliness and staff effort, using the agreed case evidence, before the next coaching discussion' is assessable and bounded. The action still needs a feasible learning opportunity and an owner for any support required. SMART planning is useful when it improves these practical details, not when it turns the form into a compliance exercise.

Employer involvement is particularly important when access to protected learning time or occupational practice is the barrier. Discuss the training needs and agreed actions at the appropriate level of detail, preserving sensitive personal information. The employer might reserve a specific learning period, arrange observation of a relevant task or identify an authorised evidence source. The coach might provide a focused explanation and feedback on one practice attempt. The learner might complete the agreed analysis and bring questions to the review. Shared responsibilities prevent a plan from assigning every corrective action to the apprentice while leaving the underlying barrier untouched.

12.5 A realistic four-week recovery plan

Consider an apprentice with two overdue reflections and an incomplete analytical assignment. The learner has continued to attend teaching and can explain much of the content orally, but operational cover has displaced part of their planned study time. The analytical assignment also reveals a specific difficulty comparing alternatives against consistent criteria. There is no indication of an immediate safeguarding concern, and the learner wants to continue. The coach and employer agree to restore the existing planned learning opportunity and concentrate on one prerequisite skill before revisiting the reflections. The plan does not assume that missed learning can be repaired by adding unpaid evening work or relabelling routine duties as training.

Week	Learning and evidence action	Support and responsibility	Success check
1	Work through one comparison example, then draft a comparison for the learner’s own assignment.	Coach teaches the method; employer protects the agreed study period; learner brings questions.	Learner uses the same criteria for both options and explains the basis of one judgement.
2	Complete the analytical assignment and respond to focused feedback.	Learner revises independently; coach reviews the specified evidence gap.	The relevant criteria are demonstrated or the remaining gap is clearly identified.
3	Complete one substantive reflection linked to the next planned learning activity; reconstruct earlier records only from reliable evidence where appropriate.	Coach helps distinguish new learning, application and evidence; learner selects authentic material.	Reflection explains learning and a credible next action; records accurately represent what happened.
4	Complete the second outstanding reflection where evidence supports it, and review future workload with the employer.	Learner, coach and employer confirm the next learning opportunity and any remaining support.	Progress is evidenced, the forward plan is feasible and unresolved gaps have named actions.

The plan concentrates on achievable outcomes rather than promising that every item will be complete by an arbitrary date. Week one’s check tests understanding before the learner invests heavily in a revised assignment. Week two tests whether that understanding produces sufficient evidence, while later weeks address reflection and the reliability of records. The employer’s action is explicit because protected time is part of the cause. Where earlier activity cannot be substantiated, the plan does not authorise invented retrospective hours or a reconstructed narrative presented as contemporaneous evidence. The provider must deal with any record or funding issue through its normal compliance process, separately from the learner’s teaching support.

The learner and coach should also identify a fallback action. If operational cover again removes the agreed learning opportunity, the learner will notify the named contact through the agreed channel, and the employer and provider will review the arrangement. If the learner still cannot compare the options after supported practice, the coach will arrange further subject teaching rather than repeatedly returning the same assignment. If personal circumstances change, the support plan will be reconsidered through the appropriate route. This makes the plan responsive to evidence instead of a contract for outcomes that may be outside one person's control. The expected standard remains clear, but the route to it can be adjusted legitimately.

12.6 Use weekly checks to learn, not merely to chase

A short weekly check should ask what was attempted, what evidence is now available, what changed and what is blocking the next step. Begin with the agreed outcome, not the number of reminder emails sent. The learner may have made substantial progress on understanding even if the final document is incomplete, and that progress should inform the next teaching action. Equally, a submitted file may still leave the key criterion unmet. Record the distinction and agree the next action while the evidence is fresh. The purpose is to keep the recovery process accurate and proportionate.

For the worked plan, a useful week-one record might read: 'The learner compared both options against timeliness and staff effort and explained the evidence used. Cost comparison remains descriptive because the available figures are unclear. The employer will identify an authorised cost source, and the learner will explain the limitations if reliable figures are unavailable. The next review will check the justification, rather than simply the presence of a cost column.' This record shows progress, a remaining barrier and shared responsibility. It is more informative than 'Learner reminded to catch up' and gives the next coach a clear starting point.

12.7 Choose and follow through the referral

Need identified	Appropriate route	Coach's continuing role
Occupational concept or technique	Tutor or subject specialist.	Specify the learning gap and check transfer into the assignment.
Literacy, numeracy or study strategy	Relevant learning support or specialist provision.	Coordinate support with occupational learning and agreed adjustments.
Access, technology or administrative barrier	Appropriate support or programme team.	Check that access is restored and the plan remains feasible.
Wellbeing or safeguarding concern	Approved wellbeing or designated safeguarding route.	Follow policy, preserve confidentiality and coordinate learning appropriately.

Need identified	Appropriate route	Coach's continuing role
Disputed judgement or inconsistent assessment	Internal quality assurance and the relevant review or appeal process.	Provide the evidence record and avoid prejudging the review.
Employer opportunity or protected time	Appropriate employer contact and programme leadership.	Agree a legitimate opportunity and monitor whether it occurs.

A good referral explains the observed issue and the help requested. 'Learner needs support' leaves the receiving colleague to repeat the entire investigation. 'The learner can describe a variance but cannot calculate or interpret the percentage change; please assess the underlying numeracy support needed and advise on a suitable learning approach' is more useful. Avoid diagnosing a condition or sharing speculation as fact. Confirm that the referral has reached the appropriate person and establish how the learning plan will be updated through the normal process. No fixed response time should be promised unless it is supported by the organisation's actual service arrangements.

12.8 Know when the whole plan needs reconsideration

If recovery repeatedly fails, reconsider the diagnosis, the training plan and the feasibility of the available opportunities. Check whether the learner has unmet support needs, whether the programme remains appropriate and whether the employer can support the required occupational learning. Involve the relevant programme and support colleagues, and include the learner in the discussion. Withdrawal should not become an automatic punishment for an overdue submission. Any change to status, duration or arrangements must follow the applicable funding, programme and organisational requirements. The coach should provide an accurate learning account, while authorised colleagues manage the relevant administrative and compliance decisions.

A break in learning is not a retrospective device for tidying an inaccurate progress record or avoiding an awkward conversation. Where a genuine pause may be appropriate, follow the applicable rules and the organisation's process, including the learner's circumstances and intentions. Do not assume that a break can be backdated to disguise missed activity or that routine assessment delay justifies one. Likewise, do not move dates or record activity that did not happen simply to make a dashboard appear healthy. Accurate records may reveal difficult issues, but they provide the basis for legitimate support and decisions. A realistic plan is more valuable than an apparently complete record that cannot be defended.

At KBC, the monthly impact submission normally due on the twentieth, monthly coaching and approximately ten-weekly review provide a regular structure for detecting and discussing progress concerns. These are provider routines described in this handbook, not national submission deadlines. A learner on a short recovery plan may need more frequent contact for a defined period, while the wider review records the implications for the forward training plan. Once the immediate gap is addressed, reduce additional monitoring to a proportionate level and support independent planning. Recovery should strengthen the learner’s ability to recognise a barrier and seek help early. It should not create permanent dependence on reminders from the coach.

12.9 In your next coaching session

Scenario. An apprentice has missed two submission dates and says that their manager repeatedly cancels learning time. They can explain the subject well but have no opportunity to gather the required workplace evidence. A colleague suggests setting a final deadline and withdrawing the learner if it is missed.

Suggested response. Verify the learning and evidence position, listen to the learner’s account and examine the agreed opportunity with the appropriate employer contact. Separate the learner’s demonstrated understanding from the missing workplace evidence, then agree a feasible and authorised opportunity to demonstrate the outstanding competence. Record responsibilities for the learner, employer and provider, together with a short review point and a fallback if the opportunity is cancelled again. Refer unresolved employer or programme barriers through the appropriate leadership route. Explain participation expectations clearly, but do not use an automatic withdrawal threat as a substitute for diagnosis and support. If continuation remains infeasible, ensure that the learner is involved and that any formal decision follows the applicable process.

IMPACT AND QUALITY

CHAPTER 13

Employer impact, career growth and transfer

Trace the difference without overstating the cause.

Connect learning with application, employer outcomes and career direction. Use baselines, corroboration and careful interpretation to distinguish demonstrated impact from a planned benefit.

READ / EXAMINE THE CASES / APPLY / REVIEW

13.1 When learning begins to change work

A thoughtful assignment can begin better performance, but is not the whole outcome. A learner may explain risk analysis accurately and still hesitate to challenge an unrealistic deadline at work. Another learner may produce a modest piece of writing while making a carefully evidenced improvement to a team's reporting process. The coach's task is to connect these forms of progress without pretending that they are interchangeable. Knowledge needs to be understood; occupational skills need to be demonstrated; behaviours need to be visible in relevant actions over time. Employer and career impact help the learner see why that development matters, while remaining proportionate to their role and opportunity.

Baldwin and Ford (1988) examined how training design, learner characteristics and the work environment influence the use and maintenance of learning. Salas and colleagues (2012) similarly emphasise the importance of what happens before and after training, as well as during it. These findings do not supply a universal formula for apprenticeship impact. They do suggest that a coach should ask about practice opportunities, supervision and employer support before interpreting a weak outcome as weak motivation. The practical framework in this chapter is KBC's application of those principles, rather than a validated measurement instrument.

13.2 Follow the chain, then test each link

Begin with the learning need: what could the apprentice not yet explain or do independently? Next identify the learning activity and the change in understanding it produced. Then examine application: where, when and how did the apprentice use the learning in an authentic task? Finally, consider the effect on work and whether it continued beyond the first attempt. A quiz may support a claim about recall, an observation may support a claim about performance, and a trend in a business measure may contribute to a claim about operational impact. None automatically proves all the others.

A useful impact account has a baseline, an intervention, an observation period and a limitation. The baseline describes the starting position using comparable information, rather than a vague statement that work used to be inefficient. The intervention identifies the learner's contribution and distinguishes it from changes made by colleagues or managers. The observation period tells the reader when results were measured and whether there was sufficient opportunity for the change to take effect. The limitation identifies alternative explanations, missing data or aspects of the result that remain uncertain. An apprentice who says, 'This improvement is promising, but the team also received a new reporting tool', demonstrates more professional judgement than one who claims all the credit.

Claim	Helpful evidence	Coach's question
I learnt a new method	Explanation, worked example, diagnostic comparison	What can you now explain that you could not explain before?
I applied the method	Dated work product, observation, decision record	Which decisions were yours, and why?
Work improved	Comparable before-and-after measures, stakeholder evidence	What changed, and what else may have influenced it?
The improvement lasted	Follow-up examples across time or situations	Did the benefit continue when conditions changed?

Do not insist on a financial return for every learning activity. A learner may improve the accuracy of a calculation, make a presentation accessible, recognise a safeguarding concern or ask a better ethical question. If an assignment requires evaluation, however, the learner should move beyond claiming that an activity was useful. They can explain who benefited, what evidence supports that interpretation and what they would investigate next. The standard of evaluation lies in the reasoning and evidence, not in the size of the claimed benefit.

13.3 Use the seven-part KBC assignment frame

The seven-part frame keeps occupational learning at the centre of a submission. It supports thinking and conversation without requiring seven equally long sections. A short reflection might address several elements in one paragraph, while an extended case analysis may need substantial treatment of each. Coaches should make the expected depth explicit in the assignment brief. Where there has not yet been an opportunity to apply learning, the learner can identify a realistic intended application and label it as planned. Proposed impact must never be presented as an observed result.

Part	What the learner should establish	Marking focus
1. Answer the task	A direct response to the question or learning activity	Relevance and completion of the required thinking

Part	What the learner should establish	Marking focus
2. New knowledge	What they now understand, including changed assumptions	Accuracy, explanation and appropriate sources
3. Skills and behaviours	What they practised or demonstrated in a specific situation	Personal contribution and observable evidence
4. Employer impact	Actual or intended effects on work	Proportionality, corroboration and attribution
5. Career impact	What the learning means for their development	Realism and evidence of growing capability
6. Action plan	A specific next application or improvement	Ownership, feasibility and review arrangements
7. Assessment readiness	How this learning supports the applicable assessment requirements	Accurate mapping and remaining gaps

If a task asks learners to evaluate stakeholder options, a beautifully written career aspiration does not compensate for missing evaluation. Conversely, an apprentice should not lose credit for omitting a large commercial impact claim when the activity only introduced a foundational concept. The formal judgement remains against the task's criteria and the relevant standard or qualification requirements. The other elements support development, integration and planning. A coach should say which elements are required evidence for the current judgement and which are prompts for the next conversation.

13.4 Worked case: improving project controls reporting

The following case and all figures are fictional. An apprentice project controls professional notices that a weekly report takes an average of 90 minutes to assemble across four baseline reporting cycles. The apprentice studies data validation, tests an exception checklist and introduces a controlled spreadsheet template with their manager's approval. Over the next four comparable cycles, preparation takes an average of 60 minutes. The apparent saving is 30 minutes per cycle, or two hours across the four observed cycles. In the same period, the team changes how source data are submitted, so the apprentice cannot attribute the full improvement to the template alone.

A weak submission would state, 'My apprenticeship saved the company thousands of pounds by improving reporting.' The statement is unsupported because neither the annual saving nor the causal contribution has been established. A stronger account identifies the baseline dates, explains how time was measured and includes redacted versions of the original and revised template. It describes the apprentice's testing decisions, including a validation rule that initially rejected a legitimate entry. It reports that fewer corrections were required but specifies the sample and avoids generalising beyond it. The learner then proposes a further review across several reporting cycles before recommending wider adoption.

The coach can accept this as credible evidence of the learner's contribution to process improvement if it satisfies the relevant criteria. They should still inspect the formula logic, version control and handling of exceptions rather than relying on a polished chart. A brief employer statement can confirm that the apprentice designed and trialled the template and explain the colleague's contribution to the source-data change. Where a criterion requires sustained independent performance, four cycles may or may not provide sufficient evidence; the decision depends on the criterion, complexity and supporting observations. 'Your evidence demonstrates a tested improvement and sensible caution about attribution; now show how you monitored reliability when an unusual data entry occurred' gives a useful next step.

13.5 Worked case: a marketing result with several explanations

This second case is also fictional. A marketing apprentice revises a campaign landing page after studying audience needs and message clarity. The earlier campaign produced 40 enquiries from 1,000 visits, an enquiry conversion rate of 4%. The revised campaign produces 60 enquiries from 1,200 visits, a rate of 5%. The increase is one percentage point, or a 25% relative increase in the rate; the number of enquiries has risen by 50%. Neither comparison alone demonstrates that the revised wording caused the change.

The apprentice investigates other differences between the campaigns. Advertising spend increased, the audience mix changed and the second campaign included a seasonal event. The learner therefore presents the result as an association during the trial, explains their own contribution and proposes a more controlled comparison if the employer's resources permit it. They also ask whether the additional enquiries met the employer's definition of a useful enquiry. If most were outside the target audience, the headline increase could conceal a weaker commercial outcome.

The coach should check the arithmetic, the comparability of the periods and the reasoning behind the next test. They can credit accurate analysis and ethical restraint even where the campaign result is disappointing. A learner who identifies an ineffective message and recommends a justified correction may demonstrate important capability. Equally, a commercially successful campaign does not automatically demonstrate the apprentice's personal competence if an external agency made the decisions. Mark the learner's reasoning and evidenced contribution against the criteria.

13.6 Employer corroboration without a signature shortcut

Employer evidence becomes useful when it says what the witness actually observed. 'The apprentice is doing very well' expresses support but provides little basis for a specific assessment decision. A more informative account states the task, the date or period, the learner's actions, the degree of independence and the result observed. The witness should distinguish direct observation from information received from somebody else. They should also describe any support they provided, because supported practice and independent performance make different claims. Coaches need to judge the witness's opportunity and competence to comment, alongside the relevance of the account.

A signature verifies that somebody has made a statement; it does not make every statement sufficient evidence. The coach remains responsible for checking authenticity and applying the assessment criteria within their role. If an employer's account contradicts a submitted document, clarification is necessary and should be recorded factually. The learner should have an opportunity to explain the discrepancy without being accused on assumption. For example, a manager may describe a shared task while the learner's assignment uses 'I' imprecisely. The proportionate response is to establish each person's contribution and assess the learner's actual work.

Some apprentices have limited access to commercially significant tasks. Billett (2001) highlights the relationship between workplace opportunities and an individual's engagement with them. KBC's practical implication is to investigate opportunity before drawing conclusions about ability. A coach can work with the employer to arrange an appropriate task, supported participation or a different permissible evidence route. Any simulation must be allowed by the relevant requirements and labelled accurately. An apprentice should not need to exaggerate their authority to make an assignment look impressive.

13.7 Career growth that the learner can explain

Career reflection should connect evidence of development with informed choices. An apprentice might recognise that they enjoy interpreting information, need more practice in influencing stakeholders or want to explore responsibility for a wider work package. The coach can help them describe the capabilities they have demonstrated and the gaps that remain. This is different from promising promotion, a salary increase or entry to a particular profession. Progress depends on opportunity, experience, labour-market conditions and any relevant entry requirements. The learner's action plan should therefore include steps within their influence, such as seeking feedback, observing a role or practising a specific task.

Encourage the learner to keep a concise record of capability examples they can discuss in a development review or interview. Each example should establish the situation, their contribution, their reasoning and the result, including what they would improve. Confidential details must be removed before material is reused outside the authorised learning environment. An apprentice should also recognise transferable limitations: performing one presentation well does not establish competence in every audience or setting. A useful career goal might be, 'Over the next month I will present one risk recommendation to a different stakeholder group and ask for feedback on clarity.' The coach can revisit the evidence and help the learner decide what it means for their next step.

13.8 Apply your judgement: impressive numbers, uncertain learning

An apprentice submits a report claiming that a new dashboard reduced project delays by 20%. The report contains an attractive graph and an enthusiastic employer endorsement. During the coaching conversation, the apprentice explains that they entered data but did not design the dashboard or decide how the figures were calculated. They can, however, accurately explain a newly learnt method for checking progress data and show two occasions when they identified inconsistent entries. The assignment requires analysis of information quality and evaluation of the apprentice's own improvement activity. What should the coach accept, and what should happen next?

The coach should separate credible learning from the unsupported impact claim. Ask how the 20% was calculated and establish the apprentice's contribution. Assess the two data-checking examples against the criteria, recognising what they demonstrate. Require the learner to correct their role description and qualify the wider claim. Agree a focused evaluation of how the checks affected information quality, supported by relevant evidence.

IMPACT AND QUALITY

CHAPTER 14

Assessment readiness from the first month

Build readiness through ordinary learning.

Develop evidence navigation, independent explanation and assessment confidence from the first month. Work with the actual assessment plan and keep readiness distinct from a final result.

READ / EXAMINE THE CASES / APPLY / REVIEW

14.1 Readiness develops through the programme

Imagine an apprentice who reaches the end of training with a folder containing hundreds of files but cannot explain why any particular item matters. They have worked hard, attended teaching and completed assignments. Their coach has marked the work, yet the connection between learning, occupational performance and assessment remains unclear. A final rush to reorganise the folder cannot create experience that never occurred or repair every misconception. Readiness is stronger when the learner gradually understands the standard, practises relevant decisions and learns to navigate evidence of their own work. This chapter treats preparation as part of thoughtful curriculum planning from the beginning.

Preparation should never consume the curriculum. Apprentices need a broad and coherent understanding of their occupation, including situations beyond the familiar examples used in practice assessments. A learner who memorises a model answer may appear fluent until the question changes. A learner who understands why they selected a method can explain an alternative and recognise when the method would be inappropriate. Coaches should therefore develop understanding and independence while making assessment expectations transparent. The purpose is confident professional performance, with assessment readiness growing from it.

14.2 Establish the correct requirements before mapping evidence

Start with the apprentice's actual occupational standard, version and applicable assessment plan. Record the assessment arrangements and the assessment organisation's permitted guidance, along with the relevant programme and qualification requirements. Different cohorts or versions of a standard can have different arrangements, so a familiar checklist may be out of date for the next learner. National reforms do not mean that every existing apprenticeship immediately loses its end-point assessment or adopts identical methods. The terms and timing used in preparation should follow the requirements applicable to that apprentice. Where documents appear inconsistent, resolve the point through the appropriate authoritative route and retain the clarification.

A controlled requirements register reduces reliance on memory. It should identify each source, its version or publication date, the cohort to which it applies and the date it was checked. Keep the exact requirements separate from the coach's local interpretation or practical suggestions. If a change affects evidence selection, assessment timing or preparation, explain it to the learner and employer in plain language. Do not silently replace the previous checklist and leave an unclear record of earlier decisions. Good version control protects learners from being prepared for an assessment that does not apply to them.

Register item	What to record	Why it matters
Standard and version	Exact title, identifier and version	Establishes the occupational requirements
Assessment arrangements	Applicable plan and authorised guidance	Establishes methods, conditions and evidence rules
Cohort applicability	Start details and any confirmed transition arrangements	Prevents assumptions across cohorts
Local preparation	Practice activities, review points and owners	Shows how the requirements are being addressed

The occupational KSBs and the assessment criteria must be read carefully rather than treated as a collection of keywords. A criterion may require an explanation, a justification, a comparison or evidence of performance under particular conditions. Those demands are different even when they concern the same topic. A learner who names stakeholder categories has not necessarily evaluated how to engage them. A learner who participated in a meeting has not necessarily demonstrated independent management of conflicting priorities. The coach's mapping should explain the connection between evidence and requirement, rather than merely attach a code.

14.3 Build evidence that the learner can navigate

A useful evidence index tells the reader what an item is, what the apprentice contributed and where the relevant material can be found. Include a stable item identifier, a meaningful title, a date or period and a precise location within the item where needed. The mapping should be selective and defensible. Assigning every KSB to every document makes the portfolio harder to evaluate and conceals genuine gaps. One strong item may support several requirements, but each connection needs a reason. Conversely, a single requirement may need several pieces of evidence before the claim is sufficiently demonstrated.

Evidence quality also depends on context. A spreadsheet without an explanation of its purpose, source data and the apprentice's role may be difficult to interpret. A meeting record may show that a decision was made while leaving unclear who analysed the options. A short factual context note can resolve these problems where such notes are permitted. The learner should identify any collaboration, redaction or support relevant to the claim. Context clarifies evidence; it should not turn an incomplete or inauthentic product into a claim that the learner has demonstrated more than they did.

At each review, ask the learner to locate an example and explain its significance without reading a prepared paragraph. They might identify the requirement it supports, point to the relevant section and describe the decision they made. The coach can then ask what the item does not establish. This final question is valuable because it develops evidence judgement and prevents overclaiming. A learner who recognises that a plan shows intended action but needs an observation or outcome record to demonstrate implementation is becoming a more capable professional. Navigation is therefore a thinking skill as well as an administrative convenience.

14.4 Keep the learning record and the eligible portfolio distinct

Reflective writing can be excellent for learning, while being unsuitable for inclusion in a particular assessment portfolio. Some assessment plans restrict the use of reflective accounts or self-assessment material, and some specify what the portfolio must or must not contain. The coach should apply the exact rules for the learner's plan rather than assume that an assignment accepted during training is automatically eligible assessment evidence. The same distinction applies to quizzes, tutor feedback and practice discussion recordings. These may inform teaching and readiness decisions without belonging in the submitted portfolio. Keep the learning record valuable in its own right.

A practical approach is to maintain a learning record and an assessment evidence collection with clear links where appropriate. The learning record can show misconceptions, feedback, reflection and the apprentice's next steps. The evidence collection contains only material permitted for its defined assessment purpose. If a reflective account helps the apprentice identify a useful workplace product, select the eligible product and supply only the permitted factual context. Do not disguise a prohibited reflection by changing its filename. Transparent selection is part of assessment integrity.

This distinction also protects the record of off-the-job training. A learning activity, its assessment and later evidence administration may have different funding treatment under the applicable rules. The existence of a portfolio item does not establish that all time spent preparing or arranging it qualifies as off-the-job training. Apply the cohort's rules to the activity itself, including the exclusions for on-programme testing and portfolio compilation. Record any eligible substantive learning separately and accurately. Readiness preparation is educationally useful even when a particular part of it cannot be counted as funded training time.

14.5 Prepare for discussion through understanding

Practice questions should help the apprentice think, rather than supply sentences to memorise. Begin with an authentic situation and invite the learner to explain their purpose, choices and contribution. Follow with questions about alternatives, constraints, evidence and learning. Change one condition to see whether the learner can adapt their reasoning. Finally, ask where the method would be unsuitable or what additional information they would need. This progression reveals the difference between recalling a familiar story and understanding professional judgement.

Consider a project management apprentice who describes escalating a risk. The coach can first ask what made the issue a risk rather than an existing problem, then explore why the escalation threshold applied. They might change the scenario by introducing an uncertain estimate, an absent decision-maker or a conflicting stakeholder request. The learner should explain how these conditions affect the response. The coach should avoid feeding the missing answer through a leading question that contains all the required reasoning. When support is needed, pause the practice, teach the concept and later check understanding with a different example.

Practice prompt	What it explores	Follow-up if the answer is thin
Why did you choose that approach?	Reasoned selection	Which alternative did you consider?
What evidence informed the decision?	Information judgement	How did you check its reliability?
What was your contribution?	Authenticity and independence	Which part did a colleague complete?
What would change in this situation?	Adaptation and transfer	Which assumption no longer holds?

Feedback after a practice discussion should be specific and proportionate. Tell the learner which reasoning was clear, where evidence was missing and what to practise next. Avoid marking every hesitation as a weakness in occupational competence. A person may understand a complex decision while needing a moment to organise their answer, and communication should be judged against the actual criteria. Where an agreed adjustment is needed, follow the applicable process and prepare the learner to use it. Confidence grows more securely from understanding expectations than from being told to sound more impressive.

14.6 A staged preparation approach

In the first month, introduce the occupation, the programme's assessment arrangements and the distinction between learning activities and assessment evidence. Ask the learner to explain a small example of their current work so that you can diagnose their starting point. Agree how work products will be captured safely and how evidence of personal contribution will be identified. The aim is orientation, not a complete portfolio or premature judgement of final competence. Where the employer cannot yet offer a required type of experience, record that opportunity need. Addressing it early is usually more useful than discovering it at the end.

During the programme, combine curriculum progression with periodic evidence reviews. Select a manageable number of examples that represent the learner's developing practice. Check whether earlier feedback has changed later work and whether the learner can apply ideas in unfamiliar situations. Monitor both depth and coverage: a large quantity of evidence on a favourite topic may coexist with a significant gap elsewhere. Agree workplace opportunities with the employer and revisit their completion. Review plans should identify the experience to be gained, the evidence expected and the support required.

As the planned completion point approaches, conduct a structured readiness review against the applicable requirements. Confirm evidence eligibility, coverage, authenticity and any required administrative or gateway conditions. Check that the learner can explain their own work and respond to reasonable variation in questions. Confirm the arrangements for support and any authorised adjustments rather than relying on informal promises. Record the decision, unresolved issues and responsible actions clearly. A readiness judgement is an evidence-based decision about proceeding under the applicable arrangements; it is not a prediction that the learner will achieve a particular grade.

14.7 Readiness decisions with integrity

Traffic-light tools can help organise a conversation, but their colours must have defined meanings. 'Green' should not mean that a coach has an optimistic feeling or that every folder contains a file. It might mean that the specified readiness condition is met and the evidence has been checked. 'Amber' should identify an exact gap with a feasible action and review date. 'Red' should trigger an appropriate response to a material unresolved requirement. The underlying evidence and decision are more important than the colour.

Pressure to complete must not encourage backdating, fabricated evidence or coaching that replaces the learner's contribution. Equally, an overly cautious coach should not delay a learner solely because their writing lacks polish when the applicable requirements are met. Use standardisation and quality assurance to resolve genuine uncertainty. Explain the decision to the learner in a way that preserves confidence and makes the next step understandable. If a concern is about access arrangements, workload or employer opportunity, address that cause rather than labelling the apprentice generally 'not ready'. Precision makes decisions fairer and support more effective.

The handover into assessment should also protect continuity. The learner needs clear information about what happens next, who can answer procedural questions and the boundaries of permitted support. Coaches should retain their ordinary concern for wellbeing without intervening improperly in independent assessment. A learner who encounters an unexpected problem should know the authorised route for raising it. Following assessment, feedback and outcomes can inform future curriculum improvement without exposing confidential assessment material or encouraging rehearsed answers. Preparation then becomes a learning cycle for both the apprentice and the provider.

14.8 Apply your judgement: a polished portfolio with a hidden gap

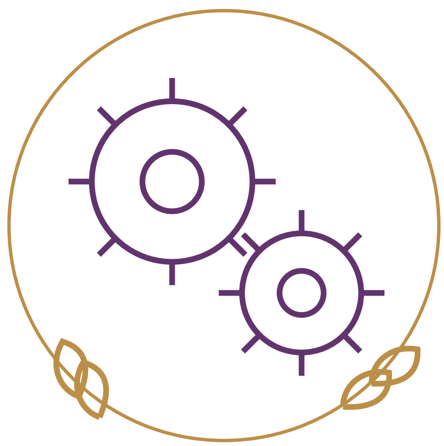
A learner presents an orderly portfolio with a mapping table showing every requirement as complete. One mapped item is a reflective essay describing how a risk workshop should be conducted, but the applicable assessment plan does not permit reflective accounts in that portfolio. Another item is a workshop record that names the learner as an attendee but does not establish their contribution. In a practice discussion, the learner explains risk principles accurately but cannot describe how they dealt with conflicting views. The employer confirms that there is a suitable workshop next month. The coach must decide how to support progress without treating a complete mapping table as proof of readiness.

The reasoned response is to retain the reflective essay in the learning record and remove it from the assessment collection if it is ineligible. The coach should examine the workshop evidence and ask for factual clarification of the apprentice's actual contribution. Any existing competence supported by valid evidence can be recognised, while the unresolved requirement is recorded specifically. The upcoming workshop can provide an appropriate development opportunity, with agreed responsibilities and evidence capture that comply with the plan. After the activity, the coach should review the resulting evidence and probe the learner's reasoning before revisiting readiness. The learner receives a clear, achievable route forward, and the final decision remains grounded in what they can genuinely demonstrate.

IMPACT AND QUALITY

CHAPTER 15

Quality assurance and assessor development



Good judgement grows through professional challenge.

Use sampling, standardisation and assessor development to improve decisions. Learn from disagreement, examine criterion-level evidence and follow changes through to learner benefit.

READ / EXAMINE THE CASES / APPLY / REVIEW

15.1 Quality belongs inside the marking process

Two coaches read the same assignment and reach different conclusions. One values the learner's confident narrative and workplace result; the other sees little evidence that the required analysis has been completed. Both believe they are helping the learner, yet their disagreement could produce an unfair outcome. Quality assurance creates a disciplined way to examine such differences before they become inconsistent practice across a programme. Its purpose is to protect the validity, fairness and usefulness of assessment. It also helps coaches improve their judgement without needing to pretend that every decision is obvious.

An effective system examines the task, the evidence, the decision and the feedback together. A well-designed rubric cannot compensate for an assignment that fails to elicit the required competence. A correct decision may still be accompanied by feedback that leaves the learner unable to improve. A detailed record can be administratively complete while missing a serious authenticity concern. Internal quality assurance therefore needs professional attention to substance as well as procedure. The arrangements must also meet the requirements of the relevant awarding or assessment organisation where those apply.

15.2 Design a purposeful sampling approach

A sample should be selected to answer useful questions about assessment quality. Include different coaches, methods, programme stages and decision outcomes, with particular attention to areas where uncertainty or change increases risk. A new assessor may need closer support, while a revised assignment may require early review even when the assessor is experienced. Borderline decisions, resubmissions, reasonable adjustments and authenticity concerns can reveal issues that a sample of straightforward passes would miss. Include some work that appears routine so that the process does not assume problems occur only in unusual cases. Apply any mandated sampling requirements alongside this professional judgement.

Sampling should occur early enough to influence practice. Reviewing a completed cohort can reveal lessons, but it cannot always prevent harm to those learners. A prospective review can examine whether an assignment and its guidance are fit for purpose before issue. Interim sampling can check decisions and feedback while there is still time to act. Follow-up sampling can establish whether an agreed improvement actually changed later marking. The sampling record should explain the rationale and findings, rather than simply list the files opened.

Sampling focus	Example selection	Question to resolve
New or changed practice	A new brief and its first submissions	Does the task elicit the intended evidence?
Decision consistency	Passes, referrals and borderline work	Are the same criteria being applied comparably?
Equity and access	Different agreed adjustments and delivery contexts	Is access supported while the standard is preserved?
Improvement follow-through	Later work after assessor feedback	Did the agreed change improve decisions or learning?

The sample should not become a permanent label attached to a coach or learner group. A concern may justify closer attention, but the response should be reviewed when evidence improves. Quality staff should also consider whether a pattern reflects the brief, the curriculum or employer opportunity rather than individual assessor performance. For example, repeated weak analysis across several coaches may indicate that learners have not been taught how to compare alternatives. Increasing scrutiny of marking alone will not resolve that teaching gap. Sampling is most useful when it leads to the right diagnosis.

15.3 Standardisation as a conversation about evidence

A productive standardisation session begins with a common task and the applicable criteria. Coaches independently review a selected anonymised submission before seeing their colleagues' decisions. Each identifies the evidence supporting the judgement, the evidence that is absent and the feedback they would give. The group then examines specific points of agreement and disagreement. This order reduces the risk of simply following the most confident or senior voice. Where independent review is impractical, the facilitator can still ask participants to record a judgement before the discussion begins.

The discussion should distinguish disagreement about a fact from disagreement about the standard. One coach may have missed a calculation in an appendix; another may interpret 'evaluate' as requiring a justified comparison. These need different resolutions. The first requires checking the evidence; the second requires examining the criterion, its context and authorised guidance. The group should not resolve uncertainty by averaging marks that rest on incompatible interpretations. If the issue remains material and unresolved, seek the appropriate quality or awarding-body clarification.

Record the principle agreed and an example of how it applies. A useful note might say that a learner must compare options using relevant evidence and justify a conclusion when the criterion requires evaluation. It should also explain that a particular writing style or fixed number of paragraphs is not an additional requirement unless the specification says so. Keep examples broad enough to support judgement across different contexts. Reusing one model answer too rigidly can narrow teaching and penalise valid alternative approaches. Standardisation should improve consistency while preserving responsiveness to authentic evidence.

15.4 Worked case: when confident writing disguises a gap

In this fictional case, an apprentice analyses a delayed marketing project. The submission describes the sequence of events fluently, includes relevant terminology and ends by recommending more frequent meetings. Coach A judges the work complete because the account is convincing and the employer liked the recommendation. Coach B requests further work because the assignment requires critical analysis of causes and alternatives. The evidence includes a missed approval, a late supplier response and a change in scope, but the learner does not examine their relationships. Both coaches bring the work to standardisation with written reasons for their decisions.

The group first confirms the task's demand. Description is relevant background, but the required analysis concerns why the delay occurred, how competing explanations fit the evidence and why the recommendation addresses the causes. The employer's approval helps establish workplace relevance but does not supply the learner's missing reasoning. Coach B's concern is therefore justified on this criterion. However, the group rejects a proposed instruction to 'add 500 words', because length would not necessarily address the gap. The agreed feedback asks the learner to compare two plausible causes using the project record and justify a response that addresses the stronger explanation.

The quality reviewer then considers whether other learners received inconsistent decisions. This is a question for proportionate investigation, not an automatic assumption that every previous decision was wrong. A targeted sample can establish whether the same misunderstanding affected other work. If it did, the provider should follow its procedures to correct decisions, communicate fairly and support affected learners. The assessor's development action is to practise distinguishing description, analysis and evaluation across several examples. A follow-up sample checks whether that distinction appears in later feedback and decisions.

15.5 Feedback quality is more than a full comment box

Black and Wiliam's (1998) review helped establish the importance of using assessment information to improve learning. In the KBC approach, this means examining what happens after feedback is given. A learner who receives detailed comments but cannot identify the next action has not yet gained the intended benefit. Quality reviewers should look for a clear connection between the criterion, the evidence and the next step. They should also examine later work to see whether the learner used the feedback. The amount of text in the feedback box is a weak substitute for that evidence.

Useful feedback is accurate, understandable and manageable. It recognises what is already secure, identifies the most consequential gap and gives a feasible action. It does not rewrite the learner's answer or demand improvements unrelated to the criterion. Tone matters because unnecessarily harsh language may discourage participation, while vague reassurance can hide a serious issue. Reviewers can ask the learner to explain what they believe the feedback means and what they plan to do. A mismatch between the intended message and the learner's understanding is information for improving communication.

For presentation assessment, quality review should inspect the actual basis of the judgement. Is the coach assessing the required occupational explanation, the communication criteria or personal preferences about delivery? Has accent, eye contact or visible confidence been treated as a proxy for competence without a relevant criterion? Were the agreed conditions and adjustments applied? Does the feedback identify a specific communication behaviour that the learner can practise, such as explaining an unfamiliar term or pausing after a recommendation? These questions support fair assessment without lowering the required standard.

15.6 Read quality indicators together

A small set of indicators can help leaders notice patterns, provided the indicators are interpreted rather than pursued blindly. Turnaround time matters because delayed feedback may prevent a learner from improving before the next task. Agreement between assessors can reveal consistency, but high agreement is not proof that their shared judgement is correct. Referral and resubmission patterns can identify unclear briefs or teaching gaps, but low referral rates do not automatically mean high quality. Learner feedback can reveal confusion, while satisfaction alone does not establish validity. Read quantitative indicators alongside samples of real work and conversations about learning.

Indicator	Useful interpretation	Important limitation
Feedback timeliness	Can learners act before the next relevant task?	Fast feedback may still be inaccurate or superficial
Decision agreement	Where do assessors interpret evidence differently?	Shared error can produce high agreement
Resubmission patterns	Are gaps recurring by task or criterion?	Rates depend on task difficulty and learner starting points
Feedback use	Does later work address the identified gap?	Improvement may also reflect teaching or workplace support

Leaders should resist incentives that reward quick marking at the expense of defensible decisions. They should also avoid comparing coaches without considering caseload, learner needs and assessment complexity. A coach supporting several complex referrals may need more time than one marking straightforward foundational tasks. The relevant question is whether resources and support enable accurate, timely practice. Indicators should guide investigation and improvement rather than public ranking. This keeps the quality system focused on learners and protects honest reporting.

15.7 Develop assessors through qualifications and practice

CAVA provides a relevant foundation for the principles and practice of vocational assessment, including assessment planning, evidence gathering and judgement. Level 5 teaching qualifications can deepen understanding of curriculum, inclusive teaching and the relationship between assessment and learning. Level 7 study in education management or leadership can support critical evaluation of systems, research and organisational improvement. These are developmental connections, not claims that this handbook awards credit, covers every unit or establishes equivalence between qualifications. Exact titles, specifications, registration arrangements and assessment requirements differ between awarding organisations and versions. A coach pursuing a qualification should map their own evidence against that qualification's current requirements.

Qualifications are one part of professional competence. Coaches also need current occupational knowledge, supervised practice where appropriate and opportunities to examine their own decisions. A development plan should begin with an evidenced need, such as uncertainty about judging analysis or supporting oral feedback. Agree a focused activity, then identify what changed in practice. Reading a paper or attending a webinar may contribute, but an attendance certificate does not show that assessment improved. Evidence might include a revised brief, an observed feedback conversation and a later sample of more precise marking.

Observation works best when its purpose is clear. The observer and coach can agree to examine how the coach checks the learner's understanding of feedback. During the session, the observer records actions and responses rather than broad personality judgements. Afterwards, they discuss what the evidence suggests and agree a manageable improvement. The coach then tries the change and reviews its effect. This process treats professional learning as an inquiry into practice, rather than a performance staged for observation.

15.8 An assessor inquiry that can be sustained

A small inquiry can begin with a precise question: 'Do learners respond more successfully when my resubmission feedback names one priority criterion and asks them to explain their next step?' The coach reviews a few existing examples to understand the current problem, then trials the revised approach with appropriate support and oversight. They examine subsequent work and ask learners what helped or remained unclear. They also consider other influences, such as additional teaching or differences in task difficulty. The findings can guide local improvement without being presented as a controlled scientific experiment. At Level 7, the coach might critically examine the design, ethics and limitations in greater depth if their qualification requires it.

Share learning through anonymised examples that colleagues can inspect. A brief account of a change, its rationale and its observed effect is often more useful than a long presentation of general principles. Preserve uncertainty where the evidence is limited, and do not turn a promising local trial into a mandatory rule too quickly. Invite colleagues to test whether the approach works in different contexts. This supports a professional culture in which expertise is developed collectively. It also connects academic study with the decisions coaches make every day.

15.9 Apply your judgement: a perfect agreement rate

A quality dashboard shows that two assessors agree on every sampled decision. Learners nevertheless report that feedback is hard to understand, and several repeat the same analytical weakness across assignments. On inspection, the quality lead discovers that the second assessor sees the first assessor's judgement before reviewing the work and usually adds 'agreed'. The sample contains only straightforward passes. Leaders have praised the apparent consistency and want to reduce the time allocated to standardisation. What should the quality lead recommend?

The reasoned response is to explain that the current measure provides limited evidence of independent consistency and none, by itself, of feedback effectiveness. The sampling approach should include a more purposeful range of decisions and some independent review before discussion. The team should examine the recurring analytical weakness, including the teaching, task design and clarity of feedback. Learner accounts and subsequent work can help identify why the intended improvement is not occurring. Leaders should retain sufficient time for focused standardisation and review whether changes improve the substance of marking. A credible quality system welcomes evidence that challenges a reassuring dashboard.

IMPACT AND QUALITY

CHAPTER 16

An evidence-informed coaching culture

Make strong practice typical and sustainable.

Connect leadership, workload, employer partnership and inclusion with the quality of marking. Examine everyday records and sustained learner outcomes when evaluating provision.

READ / EXAMINE THE CASES / APPLY / REVIEW

16.1 The learner experiences the whole system

An apprentice does not experience curriculum design, marking, employer engagement and quality assurance as separate departments. They experience a question they do not understand, a coach who notices, a manager who makes time and feedback that helps them take the next step. They also experience the opposite when responsibilities are unclear. A supportive conversation loses value if the promised teaching never happens, while a well-designed assignment becomes frustrating if feedback arrives too late to use. An evidence-informed culture connects these parts of the learner's journey. Its quality becomes visible in what apprentices can explain, do and improve over time.

For Kent Business College, the central purpose is to empower futures through capable, ethical professional practice. Assessment contributes by making development visible and helping learners act on it. Partnership matters because the provider, apprentice and employer each influence the opportunities through which learning becomes useful. Inclusion matters because access, confidence and opportunity are not distributed equally. Safeguarding matters because concerns about safety and wellbeing cannot be managed as ordinary marking problems. Responsible use of resources matters because professional practice includes considering its wider effects, including avoidable waste and environmental impact.

These commitments need operational meaning. A value such as inclusion becomes concrete when an inaccessible task is adapted through an appropriate process and the learner can demonstrate the required competence. Partnership becomes concrete when an employer provides the agreed opportunity and the coach follows up on the learning. Empowerment becomes concrete when the learner can judge their own work more accurately and seek help earlier. Sustainability becomes concrete when resources are chosen thoughtfully without making learning less accessible. Leaders should therefore ask for examples of changed practice and learner benefit, alongside statements of intention.

16.2 Use research as a guide to inquiry

Evidence-informed practice combines relevant research, professional expertise and careful attention to the learner's circumstances. It does not mean copying a technique from a paper without considering its setting. Research on training transfer reminds us to consider the work environment and opportunities to apply learning, while formative assessment research directs attention to the use of information in improving learning. These principles can help coaches ask better questions about their practice. They cannot determine every judgement about an individual assignment. The coach still needs to inspect the evidence, understand the criteria and consider context.

A practical improvement cycle begins with a specific problem. For example, learners may repeatedly describe events when a task requires analysis. The team examines examples, considers a plausible explanation and selects a focused change, such as teaching comparison through worked cases. It then checks later work and learner explanations to see whether the change helped. If the evidence is mixed, the team investigates rather than declaring success because the activity was delivered. This is a proportionate professional inquiry, not a claim that every local improvement has been scientifically proven.

Leaders should distinguish research strength from the confidence of a presentation. A systematic review, a single study, a professional opinion and a provider's internal case example make different contributions. When staff use a source, they should understand what it actually investigated and avoid extending its conclusions beyond the evidence. Local learner experience can reveal a problem that published research does not address precisely. Equally, a popular local practice may deserve challenge when its assumptions are weak. A healthy culture allows both kinds of evidence to inform decisions.

16.3 Make responsibilities and handovers dependable

Every important action should have an owner, an expected completion point and a way of confirming that it happened. The coach may identify a curriculum gap, but a tutor may need to provide the teaching. The employer may need to release the learner for a suitable task, while the quality team checks the fairness of an assessment decision. Support staff may arrange an accessible resource or specialist referral. Without a clear handover, each person can believe that somebody else is acting. The apprentice should not have to coordinate the provider's internal responsibilities to receive agreed support.

A concise action record can establish the issue, the learner's perspective, the next step and the person responsible. Record the information necessary for the task and protect sensitive details through the appropriate access arrangements. Confirm what the learner and employer need to know, especially where a planned activity or deadline changes. At the review point, record the outcome and any further action. 'Referral made' is not the same as knowing whether support was accessed or whether the learning barrier has changed. Follow-through is part of the intervention.

Decision or action	Accountable role in the local process	Evidence of completion
Assess the submission	Authorised assessor or coach	Criterion-based decision and feedback
Address a learning gap	Agreed teaching or coaching lead	Teaching provided and understanding rechecked

Decision or action	Accountable role in the local process	Evidence of completion
Secure workplace opportunity	Agreed employer contact with coach follow-up	Task opportunity and resulting learning evidence
Resolve a quality concern	Quality lead under the relevant procedure	Reviewed decision, actions and subsequent check

Local role titles may differ, and the accountable person should be named in the operational record. This table is a model for responsibility, not a replacement for a provider's governance arrangements. Coaches should know when a matter falls outside their authority and where to take it. They should also know which situations require immediate escalation, such as an urgent safeguarding concern. A learner's safety must not depend on the next scheduled progress review. Ordinary learning actions and specialist concerns require connected but appropriately distinct routes.

16.4 Protect time for thoughtful assessment

High expectations require workable conditions. Coaches need time to read the evidence, make a judgement, communicate it and follow up where necessary. Caseload planning should consider task complexity, learner needs, assessment methods and the level of support required. A fixed allocation that ignores these differences can encourage rushed marking or delayed feedback. Leaders should examine where time is being spent and remove avoidable duplication. The aim is to preserve professional attention where it adds value to learning and the integrity of decisions.

Reusable guidance can support efficiency when it remains responsive to the actual submission. A coach might maintain explanations of common concepts or examples of a strong evidence link. These can save time, but feedback still needs to identify the learner's specific evidence and next action. Large banks of generic praise or criticism can make comments look substantial without making them useful. An efficient process also limits unnecessary rewriting and repeated submission of material already securely evidenced. The learner's effort should be directed towards the genuine gap.

Set realistic expectations for feedback and communicate delays early. Timeliness should be judged in relation to the learner's next opportunity to act, not solely by an administrative deadline. Where a task reveals a serious misconception, a short targeted teaching conversation may be more effective than an extended written comment. Where several learners share the same gap, a well-designed group teaching activity may be appropriate, followed by individual checking. The assessment record should still explain each learner's judgement. Efficiency and personalisation can coexist when the purpose of each activity is clear.

16.5 Use AI with accountable human judgement

AI tools may help a coach draft a practice scenario, simplify the wording of feedback or organise a set of comments. Their usefulness depends on the task, the authorised tools and the information supplied. They can also produce inaccurate explanations, invented references or plausible judgements that overlook the actual criteria. A human assessor must inspect the source evidence and remain accountable for the decision. An automated output is not evidence that an assignment meets a standard. The coach should be able to explain the judgement independently of the tool.

Before using any system, follow the provider's arrangements for authorised use, confidentiality and data handling. Avoid entering identifiable learner information, sensitive personal details or confidential employer material into an unapproved service. Where an approved process permits data use, include only what is necessary and apply the required controls. Check generated content for factual accuracy, fairness, accessibility and relevance to the actual learner. Do not allow an efficiency tool to become an invisible source of additional assessment criteria. If technology changes the process materially, quality assurance should examine its effect.

Learner use of AI also requires clear expectations. Explain what assistance is permitted for the task, what must be acknowledged and what the learner must demonstrate personally. A change in writing style can prompt a conversation, but it is not by itself proof of misconduct. An AI detector's score should not be treated as a conclusive judgement of authorship. Use proportionate evidence checks, such as discussing decisions, examining draft development where available and asking the learner to explain the work. Follow the relevant procedure fairly when concerns remain, and use the experience to strengthen understanding of professional integrity.

16.6 Keep a reliable record of learning and assessment

A dependable record allows another authorised professional to understand what happened and why. It identifies the activity, relevant dates, the learner's evidence, the assessor's decision and any resulting action. Records should preserve the distinction between the apprentice's learning, the assessment of that learning and administrative preparation. For off-the-job training, apply the rules relevant to the apprentice's cohort and activity. The time a coach spends marking is not the apprentice's training time. A successful assessment decision does not retrospectively make an excluded activity eligible for funding.

Digital systems can help connect records, but the connections need meaning. A completion flag in a learning platform may show that a resource was opened or a task submitted, depending on the system's design. It does not necessarily establish the duration or depth of learning. A portfolio reference may support assessment while adding nothing to the evidence of training time. A monthly total should be understandable through the underlying activity record and required supporting evidence. Coaches need enough system literacy to know what the data actually represent.

When an error is found, correct it through the authorised process while preserving an understandable history. Do not invent a missing event or alter a date to make the record appear more complete. A factual note explaining the correction and its basis is more credible than a seamless but inaccurate history. Where information cannot be established, record the uncertainty and take the appropriate action. Leaders should make it safe for staff to identify mistakes early. Concealed errors are harder to resolve and can undermine trust across the whole programme.

16.7 Demonstrate sustained benefit and inclusion

Inspection preparation should begin with the quality of everyday provision. A provider needs to understand whether learners are learning, whether support reaches those who need it and whether employer partnerships create useful opportunities. It should be able to explain the evidence supporting its strengths and the action taken where improvement is needed. A carefully selected success story can illustrate practice, but it cannot establish the experience of every learner. Look for patterns across time, programmes and different learner circumstances. The aspiration to exceptional provision should increase the depth of inquiry, rather than encourage a performance of perfection.

The September 2026 Ofsted further education and skills toolkit treats exceptional as a formal evaluation-area judgement. The strong standard must first be met, alongside every exceptional descriptor for that area. Curriculum and achievement descriptors emphasise substantial benefit, high levels of learning relative to starting points and preparation for next steps, including for learners facing barriers. Inclusion concerns sustained removal of barriers and the difference this makes to experience and achievement. Significant improvement needs must already be identified and prioritised. These are judgements of provision and its effects; an individual marking form cannot secure them. (Ofsted, 2026, toolkit version 2.0, pages 16, 38 and 46.)

The following table is an original KBC inquiry aid. It connects ordinary assessment records with questions about learner experience. It does not reproduce the toolkit's descriptors or replace inspection methodology. Use a sample spanning different starting points, programmes, employers and support needs, then test whether the examples represent the wider pattern. Include learners whose progress remains difficult so that the process reveals where teaching or support is still insufficient. A credible claim should withstand an ordinary learner explaining what happens when they need help.

Area of inquiry	Evidence coaches can connect	Question for leaders
Curriculum, teaching and training	Initial misconception; feedback; targeted teaching; revised work; later independent application	Did our response produce understanding that lasted beyond the resubmission?
Achievement	Starting point; theoretical explanation; practical performance; subsequent responsibility or progression	What can learners now understand and do, and how securely?
Inclusion	Identified barrier; agreed adjustment; learner experience; participation and learning after support	Was the barrier reduced while occupational expectations remained intact?
Leadership and governance	Sampling finding; accountable improvement; staff development; later evidence of changed decisions	Did the action improve learning across the provision or only tidy the records?
Participation and development	Learner-owned next steps; career conversation; professional conduct; access to useful opportunities	Can learners make informed choices and participate more confidently?

Safeguarding is evaluated separately as met or not met, rather than receiving an exceptional grade. The separate contribution-to-skills-needs evaluation applies only to the provider categories specified in the toolkit; trading with the word “college” does not itself bring an independent training provider into those categories. Coaches should understand their provider's actual scope. Ordinary records and professional conversations should make practice understandable without creating a special paperwork system for inspection. (Ofsted, 2026, toolkit version 2.0, pages 1-2, 8 and 25.)

Learner voice is especially useful when questions invite explanation. Ask, 'What changed in your work after the last feedback?' or 'What happens when you do not understand an assignment?' These questions reveal more than asking whether learners are satisfied. Employers can similarly explain the opportunities provided and changes they have observed. Staff should listen for contradictions between the intended process and the lived experience. A learner who cannot identify a next step after an action-plan meeting provides valuable information about the effectiveness of the meeting.

16.8 Improve responsibly and share what is learnt

Choose a small number of improvements that address real evidence rather than launching many initiatives at once. Define the intended benefit, the change to be tried, the people involved and the review point. Consider possible unintended consequences, such as a new template increasing workload or making oral evidence harder to use. Review the effect with learners and staff before extending the change. Preserve useful flexibility when the same approach does not suit every context. The system should become easier to understand as it improves.

Responsible practice also includes reducing unnecessary resource use. Digital resources can reduce repeated printing, but some learners need or prefer accessible printed material to learn effectively. A sensible approach offers proportionate choices, avoids duplicating large files without purpose and maintains usable versions of resources. The environmental value of an action should be described honestly rather than expressed through unsupported carbon claims. Employer projects can provide opportunities to investigate resource use and sustainable decisions where relevant to the occupation. This connects KBC's wider values with careful professional reasoning.

16.9 Apply your judgement: a reassuring dashboard, an uneven experience

A programme dashboard shows that almost all assignments are marked within the local target time. During learner conversations, several apprentices say that comments are generic and that they do not know how to improve. Two apprentices have repeatedly missed deadlines because their employer has not provided the agreed learning opportunity. A coach has raised the problem, but the action record only says 'employer contacted'. Leaders are preparing an inspection evidence pack and want to feature the positive turnaround figure. What should they do with the less reassuring evidence?

The reasoned response is to retain the accurate timeliness figure while explaining its limits and investigating feedback quality. Leaders should review actual submissions, speak with learners and check whether later work responds to feedback. The employer opportunity issue needs an accountable action, an agreed resolution and follow-up with the affected apprentices. Any immediate support should proceed while the wider improvement is designed. The evidence pack can then show an honest picture of strengths, identified issues and action whose effect is being evaluated. A trustworthy coaching culture is built through decisions that make learning better, especially when the available evidence challenges the comfortable story.

PRACTICE REFERENCE

Appendix A Coach practice toolkit

Twelve adaptable tools for planning, marking, feedback and support. Each tool separates the decision from the evidence and the agreed next action.

A.1 Assignment brief

Use this template before setting an assignment. Start with the required occupational learning and applicable criteria, then select a task that produces relevant evidence. Explain requirements in language the learner can understand, distinguishing essential assessment conditions from developmental suggestions. Confirm the current qualification or apprenticeship requirements where they govern the method. An assignment should create an opportunity to demonstrate learning; it should not depend on confidential material or workplace access that the learner cannot legitimately obtain.

Prompt	Record
Task title, programme, level and version of this brief.	
Professional purpose: what workplace question or decision will this task help the learner address?	
Learning outcomes and exact assessment criteria, with their authoritative source or reference.	
Task instructions: what must the learner explain, analyse, demonstrate or justify?	
Evidence required, including the boundary between individual contribution and collaborative work.	
Permitted resources, collaboration, digital assistance, attribution and authenticity declaration requirements.	
Submission format, expected scope, assessment conditions and agreed submission date.	
Workplace opportunities, authorised evidence access and learning support required before starting.	
Agreed adjustments or approved arrangements, referenced without unnecessary sensitive information.	
Feedback method, decision process and route for questions or assessment review.	

Before issuing the brief, ask a colleague to explain what successful evidence would look like. Resolve any ambiguity before the learner begins. Keep optional presentation advice separate from requirements that affect the assessment decision.

A.2 Seven-question learning reflection

Use after a meaningful learning activity or connected sequence of activities. The activity may involve reading, a video, a podcast, a quiz, taught practice or workplace application. Select an example that reveals learning rather than listing everything accessed. A quiz result or activity completion record can inform the account, but does not replace an explanation of understanding. Where application or impact has not yet occurred, describe an intended action honestly instead of presenting a forecast as an achieved result.

Reflection question	Record
1. What question or learning purpose did the activity address, and what is your answer?	
2. What did you understand differently afterwards, including any misconception that changed?	
3. What skill or behaviour did you practise, improve or recognise that you need to develop?	
4. What employer impact has application produced or could a planned trial produce? Distinguish observed and expected benefit.	
5. How does the learning support your career direction or professional capability?	
6. What will you do next, by when, with whose support, and how will you check progress?	
7. How does the learning prepare you to explain or demonstrate relevant evidence in the applicable assessment?	

Add the activity date and an evidence reference in the relevant responses. Identify applicable KSBs only where the account supports them. Record learning time through the separate approved process; the length or quality of this reflection does not determine the eligible hours.

A.3 Criterion decision record

Use for one criterion or a closely connected group of criteria. Record the evidence considered before writing the decision, so another assessor can follow the reasoning. Distinguish the learner's assertion from supporting evidence and explain any limitations. Use the outcome labels required by the applicable assessment process. This record supports a judgement; it does not create a new grading scale or allow one strong feature to compensate for a required criterion that is not demonstrated.

Prompt	Record
Learner record identifier, task reference, assessment date and assessor identifier.	
Exact criterion, relevant qualification or apprenticeship requirement, and source version.	
Evidence locations: document sections, observation references, recording timestamps or permitted supporting records.	
What the evidence demonstrates, using specific observations rather than a general impression.	
Authenticity, currency, relevance and sufficiency considerations, including any remaining uncertainty.	
Clarification questions or additional evidence considered, with the applicable assessment conditions.	
Decision using the authorised terminology, and the reasoning connecting evidence to the criterion.	
Required learner action, distinguished from optional developmental advice.	
Reassessment or follow-up arrangements permitted by the relevant process, including the review point.	
Quality assurance reference and information given about the relevant review or appeal route.	

Keep the decision about competence separate from the off-the-job training record and from any forecast of an apprenticeship assessment grade. If uncertainty affects the validity of the judgement, identify the appropriate quality assurance action before finalising it.

A.4 Off-the-job activity component record

Use alongside the organisation's approved training record to examine the components of a learning activity. Apply the funding rules and guidance relevant to the apprentice's start date and circumstances. Separate substantive new occupational learning from administration, routine work and other excluded activity. Record actual eligible time supported by the available evidence, avoiding double counting. Where eligibility is uncertain, record the question and seek the appropriate compliance decision rather than assuming that the whole session qualifies.

Prompt	Record
Learner record identifier, programme, start date and applicable funding-rule version.	
Activity date, learning objective and connection to the agreed training plan.	
Occupational knowledge, skill or behaviour being developed beyond what the apprentice already knows.	
Component one: describe the learning, actual duration and evidence supporting that duration.	
Component two: describe the learning, actual duration and evidence supporting that duration.	
Other components: distinguish learning from administration, routine duties or excluded activity.	
How the activity occurred within the applicable working-time and training arrangements.	
Eligibility decision for each component, the reason, and any question referred for clarification.	
Total eligible time, excluded time and checks preventing overlap with another recorded activity.	
Evidence location, confirmation details and any correction made through the approved process.	

Do not infer time from assignment word count, a generic video estimate or a completed checkbox. Preserve the difference between when learning occurred and when its record was entered. An assessment outcome does not retrospectively establish the duration of learning.

A.5 Portfolio evidence index

Use to organise evidence so the learner and assessor can locate a claim, examine its source and understand the learner's contribution. Complete one index entry for each coherent evidence item or linked set. The index is a navigation aid, not proof that competence has been demonstrated. Check the assessment plan applicable to the apprentice, including any restrictions on portfolio content or its use during assessment. Avoid collecting additional documents merely to increase the size of the portfolio.

Prompt	Record
Evidence identifier, descriptive title, activity date and portfolio version.	
Professional context: what task, decision or problem does this evidence concern?	
Evidence location and access route, using an approved and dependable reference.	
Learner's own contribution, with the boundary between individual and team activity.	
Relevant KSB or criterion references, and the precise part each item supports.	
What happened, what the learner did and the reasoning behind important choices.	
Supporting material or corroboration, including its source and any limitations.	
Confidentiality, permissions and anonymisation arrangements required for legitimate use.	
Reflection or explanation needed to interpret the evidence, where permitted by the assessment plan.	
Remaining gap, next action, responsible person's role and planned review point.	

Test the entry by asking whether another authorised reviewer could locate the evidence and understand its relevance without a lengthy explanation. Retain uncertainty where it exists. A KSB label should identify a supported connection, rather than imply that every aspect of the KSB has been fully demonstrated.

A.6 Feedback response cycle

Use when returning work and again when reviewing the learner's response. Select the few changes that most affect the relevant criterion. Feedback should tell the learner what evidence the coach considered, what remains to be demonstrated and how to attempt the next step. The learner then records their interpretation and action. This creates a visible learning cycle rather than an exchange of files in which the same comment is repeated without checking understanding.

Prompt	Record
Task reference, feedback date, criterion and current assessment decision.	
Evidence: where can the learner locate the feature being discussed?	
Strength: what is demonstrated well, and why is it useful to repeat?	
Gap: what does the criterion require that the evidence does not yet establish?	
Action: what specific thinking, practice or revision should the learner undertake?	
Check: what observable improvement will show that the action addressed the gap?	
Learner interpretation: how does the learner explain the feedback in their own words?	
Learner response: what changed, where is it located and what is now better understood?	
Follow-up judgement: what does the revised evidence demonstrate, and what remains unresolved?	
Transfer: how will the learner use this learning in a different task or workplace situation?	

Agree a realistic review point and any teaching or workplace support needed. Distinguish required corrections from optional professional development. Acknowledge the learner's response without assuming that a revision automatically meets the criterion; review the evidence before changing the decision.

A.7 Presentation observation record

Use during a live presentation, recording or permitted professional conversation. Prepare the criteria and conditions before the session. Record observable evidence with timestamps or slide references, then explain its significance separately. Judge communication against the stated requirement, avoiding assumptions based on charisma, accent or visible nervousness. Where the activity is a rehearsal, label it as practice; where it is formal assessment, follow the authorised rules for questioning, prompting, resources and supplementary evidence.

Prompt	Record
Session reference, date, assessment purpose, permitted method and applicable conditions.	
Criteria being assessed and any agreed authorised adjustment or arrangement.	
Observation one: timestamp or slide, what was said or done, and relevant criterion.	
Observation two: timestamp or slide, what was said or done, and relevant criterion.	
Observation three: timestamp or slide, what was said or done, and relevant criterion.	
Questions asked and significant responses, including any clarification of personal contribution.	
Evidence supporting the learner’s reasoning, accuracy and professional communication.	
Claims requiring corroboration, limitations acknowledged and any remaining evidence gap.	
Criterion decisions and reasons, separated from optional advice about delivery technique.	
Feedback given, learner understanding, agreed next action and recording access reference.	

If a technical interruption or unplanned intervention affects the evidence, record what happened and its consequence under the applicable process. Keep sensitive feedback private. Recordings must be handled through approved access and retention arrangements, with sufficient notes to make the judgement traceable.

A.8 Employer impact review

Use to examine whether learning is affecting workplace practice and to identify the next opportunity for application. Invite an appropriate employer contribution while preserving confidential learner information. Separate the learner's activity, the outcome observed and the explanation of why that outcome occurred. An improvement may have several causes, so avoid attributing every change to training. Where impact is not yet measurable, agree a credible observation or measurement plan instead of inventing a financial benefit.

Prompt	Record
Review date, learner record identifier, employer role involved and relevant learning objective.	
Workplace problem or opportunity before the learning, including the available baseline evidence.	
What the learner now understands or does differently, with a concrete example.	
Learner's contribution and the contribution of colleagues, systems or other changes.	
Outcome observed so far, its source, period covered and limitations.	
Employer perspective: what change has been noticed and what evidence supports it?	
Expected future benefit, clearly distinguished from an outcome already achieved.	
Career development: what greater responsibility or capability might this learning support?	
Next workplace opportunity, required supervision or resources, and agreed protected learning arrangements.	
Evaluation action: what will be checked, by whom, when and through which evidence?	

Conclude by confirming the agreed next action and how it connects with the training plan. Keep employer satisfaction separate from the assessment decision: positive feedback can corroborate relevant evidence, but does not replace the applicable criteria or prove every claimed KSB.

A.9 Four-week recovery plan

Use for a short, jointly agreed recovery cycle when progress has slipped. Begin with the actual learning or evidence gap and investigate capability, opportunity, wellbeing and participation. Check whether provider feedback, access or employer arrangements have contributed to the delay. Choose a small number of priorities that can realistically be addressed. Refer urgent or specialist needs through the appropriate route before treating the issue as a scheduling problem. Adapt the cycle where a different timescale is justified.

Prompt	Record
Current gap: what is planned, what is evidenced and what specifically remains outstanding?	
Barriers identified, learner’s explanation and any support or referral already agreed.	
Priority outcome: what change will make the most useful difference to progression?	
Week one: learning action, support, responsible roles and observable success check.	
Week two: learning action, support, responsible roles and observable success check.	
Week three: learning action, support, responsible roles and observable success check.	
Week four: learning action, support, responsible roles and observable success check.	
Employer and provider commitments, including protected learning opportunity and evidence access.	
Weekly review findings: progress, remaining barrier and any agreed change to the plan.	
Fallback arrangement and final review: what happens if the opportunity or approach fails?	

Agree the plan with the learner rather than assigning a list of overdue tasks. Keep records truthful and follow the applicable process for any formal change. Successful recovery includes a feasible forward plan, not simply a temporary increase in submissions.

A.10 Referral handover record

Use to request specific support and coordinate its effect on learning. Follow the relevant organisational procedure, particularly where safeguarding or immediate safety is involved. This ordinary learning handover should contain only the information needed for the receiving role to act. Keep sensitive safeguarding, health or other confidential detail in the appropriate restricted record, with a reference where necessary. A referral is not complete merely because a message has been sent; establish the appropriate follow-up through normal arrangements.

Prompt	Record
Referral date, learner record identifier, referring role and appropriate receiving role.	
Support requested: what specific help or decision is needed, and why now?	
Observed learning barrier, using facts and relevant evidence rather than diagnosis or speculation.	
What has already been tried, the learner’s response and what remains unresolved.	
Learner’s perspective and how the referral and information-sharing process were explained.	
Information necessary for this handover, excluding unnecessary sensitive personal details.	
Restricted record reference, where applicable, and the approved route for authorised access.	
Immediate learning arrangements while the referral is being considered.	
Handover confirmation, agreed next step and follow-up point under the relevant process.	
Outcome communicated appropriately, effect on the learning plan and remaining coordination action.	

Do not use this template to investigate allegations or record a clinical assessment. Where a situation is urgent, act through the urgent route first and complete the required records afterwards. Avoid promising a response time or outcome that has not been agreed by the responsible service.

A.11 Internal quality assurance sample record

Use within the applicable internal quality assurance arrangements to make the basis of a sampled judgement visible. State why the sample was selected and what the review will examine. Consider the evidence, criteria, assessment conditions and learner feedback together. A sample can identify a specific issue without proving that every other decision is sound or unsound. Record the limits of the review and follow the relevant procedure for wider sampling, corrective action or escalation where findings justify it.

Prompt	Record
Sample reference, date, assessor identifier, reviewer identifier and scope of the review.	
Selection rationale, including the relevant risks, coverage or planned sampling requirement.	
Qualification, criteria, assessment conditions and source versions used for comparison.	
Evidence examined and the original assessment decision with its recorded rationale.	
Review findings on validity, authenticity, sufficiency and consistency of the judgement.	
Accessibility and adjustment arrangements: were the relevant authorised conditions followed?	
Feedback quality: can the learner understand the decision and act on the next step?	
Agreement or disagreement, with evidence-based reasoning and the applicable resolution route.	
Action required, responsible role, agreed completion point and any wider sampling implication.	
Follow-up evidence, closure decision and learning to share through appropriate standardisation.	

Use anonymised material for wider professional discussion. Separate a disagreement about the evidence from a concern about process or communication, while examining both where necessary. Record what changed and why if an outcome is amended; do not obscure the original decision or its history.

A.12 Coach professional development inquiry

Use to investigate one practical question about coaching or assessment. Choose a question narrow enough to examine through ordinary work, such as whether learners understand a particular feedback instruction. Draw on relevant research and professional guidance, then test a proportionate change within authorised practice. This is a structured professional learning exercise, not a claim to have conducted a controlled research study. Protect learner information and follow any organisational requirements governing evaluation or research activity.

Prompt	Record
Inquiry question: what specific aspect of learner understanding or assessment practice will you investigate?	
Current concern and baseline: what observations suggest that improvement is needed?	
Relevant research or guidance, its main implication and its limits in this context.	
Proposed change, why it may help and what will remain governed by existing assessment requirements.	
Learner group or activity scope, proportionate information use and any required approval.	
Evidence to collect: what will show understanding, action or improved judgement?	
Findings: what happened, including unexpected outcomes and evidence that challenges your expectation?	
Alternative explanations and limitations, including changes outside your own intervention.	
Professional learning: what will you retain, revise or stop, and why?	
Next review point, peer discussion or standardisation action, and continuing development need.	

Keep conclusions proportionate to the evidence. A useful inquiry may reveal that a method helped some learners and created difficulties for others. Record that variation and use it to improve judgement rather than presenting one promising result as a universal solution.

PRACTICE REFERENCE

Appendix B Qualification alignment

A thematic professional-development map to named assessor, teaching and education-leadership qualifications.

B.1 How to use this map

This appendix is a professional-development map for coaches, assessors and education leaders. It identifies useful connections between the handbook and three named qualification frameworks. It is not a complete assessment-criteria map, a claim of approved textbook status or an offer of qualification credit. The handbook develops judgement through explanations, fictional cases and original KBC practice tools. A qualification candidate must also meet their awarding organisation's current requirements through an approved centre.

The examples are the established City & Guilds Level 3 Certificate in Assessing Vocational Achievement, the current City & Guilds Level 5 Diploma in Teaching (Further Education and Skills), and the OTHM Level 7 Diploma in Education Management and Leadership. Other awarding organisations may use different titles, structures or assessment arrangements. Match the exact qualification number, specification version and registration route before using a chapter in an evidence plan. The source review date is 12 September 2026; Appendix E provides the documents.

The tables contain KBC's suggested professional-learning applications. They do not reproduce awarding-organisation assessment briefs. A useful starting question is: “Which judgement can I now explain more clearly, and what genuine practice would allow my assessor to see that improvement?” Reading about feedback may improve an explanation; a dated assessment record and observed discussion may demonstrate how the candidate applies it. Keep those different evidence claims visible.

B.2 Established CAVA: assessment principles and practice

The City & Guilds CAVA qualification, 6317-33, has qualification reference 501/1679/4 and 15 credits. Its established components distinguish assessment principles, workplace occupational competence and vocational skills, knowledge and understanding. In handbook version 1.8, component 205 provides an assignment alternative to the portfolio route for component 301. Candidates should confirm their centre's route before preparing evidence.

Component	Exact unit title	Relevant chapters	Suggested KBC practice application
301/205	Understanding the Principles and Practices of Assessment	1, 2, 4, 5, 11, 15	Explain why a method fits the intended claim; justify a decision and identify its limits.
302	Assess Occupational Competence in the Work Environment	5, 8, 9, 11, 13, 15	Plan an authentic opportunity; establish individual contribution; connect observation with workplace products.
303	Assess Vocational Skills, Knowledge and Understanding	4-7, 9-11, 15	Compare written, oral and practical evidence; use permitted questions; give actionable, criterion-linked feedback.

The practical components require real assessment activity. The published learner logbook includes repeated assessment of learners and specified evidence methods; reading cases or completing a self-assessment checklist cannot substitute for those requirements. An assessor candidate should agree access to suitable learners, an appropriate occupational setting, observation and the required range of methods with the centre. Keep contemporaneous plans, decisions, feedback and review evidence so the assessor can evaluate the candidate's practice.

For example, a candidate can use the written-work decision record in Appendix A to prepare for a real assessment. Their portfolio then needs the actual learner evidence, the candidate's independent decision, an account of permitted support, and the required confirmation or observation. The blank template alone proves little. A polished reflection also cannot repair a missing observation or demonstrate an assessment method the candidate has never used. The centre determines admissibility and sufficiency against the full specification.

B.3 The September 2026 TAQA transition

City & Guilds introduced a revised Level 3 TAQA suite for first teaching in September 2026. Its assessment certificates distinguish in-person assessment, 6317-65, remote assessment, 6317-66, and both modes through the extended certificate, 6317-67. As checked on 12 September 2026, the legacy 6317-33 page gives 31 December 2026 as its last registration date and 31 December 2029 as its last certification date. These are City & Guilds arrangements, not universal closure dates for every CAVA award.

A candidate beginning now should obtain the selected route's current handbook and evidence requirements. Do not transfer the legacy unit numbers in B.2 into a new-suite portfolio without verification. Much of this book remains useful for discussing evidence, fairness, feedback and quality assurance, but the candidate's formal map must follow the qualification on which they are registered.

B.4 Level 5 teaching: connecting assessment with pedagogy

The current example is City & Guilds 6504-51, the Level 5 Diploma in Teaching (Further Education and Skills), handbook version 1.2. Its eight mandatory units are shown below. The government Diploma in Teaching framework provides the wider qualification context. Existing holders of the earlier Diploma in Education and Training can use the book for continuing development; replacement of a registration route does not make their completed award invalid.

Unit	Exact unit title	Relevant chapters	Suggested KBC practice application
501	Teaching my subject	2, 4, 6, 8	Explain how an occupational concept becomes a teachable activity and a defensible evidence claim.
502	Learners and learning	7, 9, 11, 12	Investigate a learner's starting point and adapt support using evidence of learning.

Unit	Exact unit title	Relevant chapters	Suggested KBC practice application
503	Teachers and teaching	4, 5, 9, 15	Evaluate how teaching, assessment and feedback connect across a sequence.
504	Professional practice	1, 8, 11, 15, 16	Examine professional responsibilities through actual decisions and their consequences.
505	Effective digital and online pedagogies	3, 4, 7, 11	Redesign an LMS activity so the learning purpose, access and evidence requirements are clear.
506	Action research	15, 16; Appendix A	Investigate one bounded practice question and evaluate a proportionate change.
507	Coaching and mentoring	9, 10, 12, 13	Review a conversation for clarity, learner ownership and subsequent action.
508	Managing behaviour	9-12, 16	Examine expectations, relationships, context and appropriate routes for support.

These connections support reading and planning; they do not establish completion of any unit. Candidates still need the specified teaching practice, placement arrangements, observations, assessed work, portfolio and viva requirements. A set of marked apprenticeship assignments is not automatically evidence of the full teaching role. Discuss the required breadth with the teacher educator before selecting material.

A useful candidate inquiry might examine why apprentices keep revising presentation slides without improving their explanation. The candidate could analyse the teaching sequence, plan an accessible rehearsal, obtain observation of their teaching, inspect learner responses and evaluate the next attempt. Chapters 4, 9 and 10 help frame the inquiry. The formal submission must follow the qualification brief and explain the candidate's pedagogical reasoning, with permissions for any learner material. This is an original example of professional learning, not a prescribed DiT assignment.

B.5 Level 7: education management and leadership

The named Level 7 example is the OTHM Level 7 Diploma in Education Management and Leadership, qualification reference 603/4248/1, specification published in 2023. It comprises six 20-credit units. It concerns educational leadership and management; it is neither a dedicated Level 7 assessor qualification nor a full master's degree. The following connections focus on analysing and improving systems of teaching and assessment.

Unit reference	Exact unit title	Relevant chapters	Suggested KBC leadership application
T/617/4998	Contemporary Issues in Education: Theory, Policy and Practice	1-3, 11, 16	Critically examine how a policy change affects assessment practice and learner experience.
A/617/4999	The Management of Educational Change	12, 15, 16	Evaluate a proposed change to feedback or review processes, including implementation constraints.
D/617/5000	Managing Effective Intercultural Communication and Perspectives	9-12	Examine whose participation is constrained by communication practices and how improvement would be evidenced.
H/617/5001	Pedagogy and Practice in Education	4-10, 13	Compare explanations of learning and justify a context-sensitive pedagogical decision.
K/617/5002	Leading Reflective Practice in Education	7, 15, 16	Design professional dialogue that challenges assumptions and follows through on agreed changes.

Unit reference	Exact unit title	Relevant chapters	Suggested KBC leadership application
M/617/5003	Research Methods in Education	13, 15, 16; Appendix A	Frame an ethical research question, justify methods and recognise limits of inference.

The candidate still needs the assessed work required by the selected programme. Useful local evidence may include a critically framed problem, an appraisal of literature, stakeholder perspectives, a justified method and a transparent analysis of findings. Access to records does not itself authorise research participation or disclosure. A fictional worked case can support learning but cannot be presented as the candidate's original empirical study.

B.6 Turning reading into a candidate evidence plan

Begin with the actual qualification brief and identify one gap in knowledge or practice. Select a relevant chapter, record the question it helps answer, and agree an authentic opportunity to demonstrate the required learning. Name the evidence that would make the candidate's contribution visible. Then obtain feedback from the authorised assessor or teacher educator and revise the plan where coverage is incomplete.

Keep the apprentice's standard separate from the coach's qualification. A coach studying at Level 7 must still assess each apprentice against that apprentice's occupational requirements. Higher-level professional study should strengthen the coach's analysis of the assessment system; it must not introduce unannounced demands into a learner's assignment. Conversely, a Level 3 assessor qualification does not justify superficial evidence decisions. Defensible practice requires the right standard, a suitable method and a reasoned judgement at every level.

PRACTICE REFERENCE

Appendix C Glossary and topic finder

A compact reference to terms used throughout the handbook.

C.1 Assessment and learning terms

Action plan. An agreed account of the next learning or support actions, who will undertake them, when they will happen and how progress will be reviewed. A useful plan addresses the reason for a difficulty rather than merely repeating the missed deadline. See Chapters 9 and 12.

Admissibility. Whether an item or method is permitted for the assessment purpose in question. Strong evidence for formative learning may be prohibited in a particular final portfolio. See Chapters 2, 8 and 14.

Analysis. Examination of relationships, assumptions, causes or patterns to explain what evidence means. Dividing a report into headings does not by itself create analysis. See Chapters 4 and 6.

Appeal. A challenge to an assessment decision through the relevant published procedure. It differs from an informal request to understand feedback and from a complaint about service or conduct. See Chapters 5, 11 and 15.

Assessment criterion. The requirement used to judge performance or evidence. It should be identifiable before the decision and must come from the appropriate specification, plan or authorised task. See Chapters 4 and 5.

Assessment organisation. The organisation responsible for apprenticeship assessment within the applicable arrangements. Terminology and provider responsibilities vary with the assessment-plan version. See Chapters 2 and 14.

Assessment plan. The version-controlled document setting the apprenticeship's assessment methods and requirements. A developmental coach rubric cannot replace it. See Chapters 2, 8 and 14.

Assessment readiness. Evidence that the apprentice is prepared to undertake the required assessment, including independent performance, relevant understanding and familiarity with permitted arrangements. It is not a prediction or award of the final grade. See Chapter 14.

Authenticity. Confidence that evidence represents the apprentice's own contribution and ability, with assistance and shared work appropriately identified. Authentication may draw on questioning, observation, process records and corroboration. See Chapters 5, 8 and 11.

Baseline. A credible starting measurement or description used to examine change. The measure, population and time period should be clear enough for a fair comparison. See Chapter 13.

Behaviour. An occupational expectation about professional conduct and ways of working, as specified by the standard. Evidence should concern relevant conduct rather than a coach's preference for a personality type. See Chapters 2 and 10.

Break in learning. A formal pause in apprenticeship learning under the applicable rules, with the required records and intended return arrangements. A coach should involve the responsible programme or compliance staff rather than use the status as an informal response to overdue work. See Chapters 3 and 12.

Calibration. A process of comparing how assessors interpret criteria and evidence, then resolving differences through a shared rationale. Agreement alone is insufficient if everyone is applying the wrong requirement. See Chapter 15 and Appendix D.

Case analysis. Examination of a bounded workplace or hypothetical situation using evidence, relevant concepts and a reasoned conclusion. It may develop analytical understanding without proving the learner performed the real occupational activity. See Chapters 4 and 6.

CAVA. Common abbreviation for the Level 3 Certificate in Assessing Vocational Achievement. This handbook uses named awarding-organisation examples; qualification titles, versions and registration arrangements must be distinguished. See Chapter 1 and Appendix B.

Competence. The capability to perform to the applicable occupational requirements, supported by appropriate evidence. A statement of confidence, attendance or completion is not enough by itself. See Chapters 2 and 5.

Constructive alignment. An educational design principle connecting intended learning, learning activities and assessment. In this book it prompts coaches to ask whether the task actually reveals the intended capability. See Chapter 4.

Corroboration. Relevant confirmation from another source that strengthens or qualifies an evidence claim. A witness should be able to describe what they observed and the apprentice's contribution. See Chapter 8.

Criterion-referenced judgement. A decision against an identified requirement, rather than a ranking against other learners or a general impression of quality. See Chapters 5 and 6.

Critical analysis. Analysis that tests evidence, assumptions and alternative explanations rather than merely accepting the first plausible account. Critical does not mean hostile or automatically negative. See Chapter 6.

Currency. Whether evidence remains relevant to the present requirement and the learner's current capability. There is no single expiry period for every kind of apprenticeship evidence. See Chapters 5 and 8.

Description. An account of what occurred or what something contains. Description often supplies useful context, but an analytical or evaluative task needs further reasoning. See Chapters 6 and 7.

Developmental reflection. A learning account that examines experience or study, identifies changes in understanding and considers future action. Its value for learning does not settle whether a formal portfolio permits it. See Chapter 7.

Diagnostic assessment. Assessment used to identify current understanding, capability or learning needs. Its information can guide teaching, but testing time is not automatically eligible OTJ. See Chapters 3 and 4.

EPA. End-point assessment. The term remains relevant where the apprentice's applicable plan uses those arrangements. Reformed apprenticeship assessment is introduced through specific versions rather than a universal change on one date. See Chapters 2 and 14.

Evaluation. A reasoned judgement of value, suitability or effectiveness against relevant considerations, with evidence and limitations explained. See Chapter 6.

Evidence location. The precise place where a claim can be checked, such as a report section, spreadsheet cell range, recording timestamp or observation entry. See Chapters 5 and 8.

Evidence sufficiency. Whether the available evidence covers the required scope, depth and performance adequately. More files do not necessarily make evidence sufficient. See Chapter 5.

Feedback literacy. The learner's capacity to understand, judge and use feedback, including managing its emotional impact. See Chapter 9.

Feedforward. Guidance directed towards a future attempt, such as a specific improvement to apply in the next report or presentation. It should be connected to the diagnosed gap. See Chapter 9.

Formative assessment. Assessment whose evidence is used to inform further teaching and learning. A comment labelled formative is only useful when it changes a next step. See Chapters 4, 5 and 9.

Gateway. A formal point at which specified conditions must be met within the applicable apprenticeship assessment arrangements. Requirements and terminology depend on the plan and relevant rules. See Chapter 14.

Impact. A difference associated with learning or its application. Distinguish an anticipated benefit, an observed change and a justified causal claim. See Chapter 13.

Individual contribution. What the apprentice personally decided, produced, performed or explained within a shared task. It should be identified without pretending that workplace collaboration did not occur. See Chapter 8.

Internal quality assurance or IQA. Processes that examine and support assessment quality, consistency and compliance within the organisation's authorised arrangements. See Chapter 15.

Knowledge. The occupational understanding specified by the standard. Appropriate explanations and questioning can reveal knowledge, while performance evidence may show how it is used. See Chapter 2.

KSBs. Knowledge, skills and behaviours in the occupational standard. Their codes and wording must be taken from the applicable version, not inferred from a similar programme. See Chapter 2.

Learning management system or LMS. A platform used to provide resources, activities and learning records. A completion tick or timestamp is evidence of a system event; its educational and funding significance requires interpretation. See Chapters 3 and 7.

Moderation. Review of assessment decisions through the relevant quality process. Organisations use this term in different ways; responsibilities and authority should therefore be explicit. See Chapter 15.

Occupational standard. The approved description of an occupation and its required KSBs. It is distinct from the assessment plan that explains how achievement is assessed. See Chapter 2.

Off-the-job training or OTJ. Qualifying planned apprenticeship training under the applicable rules. It develops relevant new capability and meets the paid-time and activity conditions; it does not simply mean any time away from a desk. See Chapter 3.

Portfolio. A purposeful collection of evidence. Its contents, role and assessment status depend on the programme or qualification; some apprenticeship portfolios support a discussion without being directly graded. See Chapters 8 and 14.

Prior learning. Relevant understanding or competence gained before the programme. Recognition of prior learning informs an individual training plan and the required adjustments under applicable rules. See Chapter 2.

Professional discussion. A structured assessment conversation used where the applicable plan or qualification provides for it. Routine coaching conversations can develop explanatory ability but are not automatically the formal assessed discussion. See Chapters 10 and 14.

Progress review. A planned review of apprenticeship progress, support and actions involving the relevant parties. It is distinct from any genuine teaching delivered in a separate component of the same meeting. See Chapters 3 and 12.

Reasonable adjustment. An authorised change that addresses a disability-related disadvantage in assessment while preserving the required attainment. The relevant awarding or assessment arrangements govern what is permitted. See Chapter 11.

Referral. A purposeful handover to an appropriate person or service when the learner's need, a concern or an assessment issue requires expertise or authority beyond the coach's role. See Chapter 12.

Reliability. The consistency of assessment decisions under relevant comparable conditions. Shared criteria, exemplars and assessor development can support reliability, but consistency does not alone establish validity. See Chapter 15.

Resubmission. A further submission permitted by the applicable assessment arrangements. Scope, support, timing and consequences should be clear to the learner. See Chapters 5 and 9.

Retrieval practice. Recalling previously learnt information to strengthen or examine access to it. It may be educationally useful while still requiring a separate OTJ eligibility decision. See Chapters 3 and 7.

Rubric. A structured description of criteria and, where appropriate, levels of performance. An original developmental rubric should be labelled as such rather than presented as official grading criteria. See Chapters 4, 6 and 10.

Self-regulated learning. Processes through which learners plan, monitor and adjust their learning, with motivation, emotion and context also influencing action. See Chapters 7, 9 and 12.

Skill. The ability to carry out an occupational action to the required standard. A written explanation may support its assessment but cannot always replace required performance evidence. See Chapter 2.

Special consideration. A process under the relevant assessment arrangements for temporary adverse circumstances affecting assessment. It differs from planned reasonable adjustments and should be handled through the authorised route. See Chapter 11.

Standardisation. Planned professional work to establish and maintain consistent interpretation of assessment requirements and evidence. It should result in clearer decisions and follow-up, rather than only a meeting record. See Chapter 15.

Summative assessment. Assessment used to make an achievement decision at a defined point. Rules about assistance and evidence apply even when further learning would be beneficial. See Chapters 4 and 5.

Transfer of learning. Application and maintenance of learning in another relevant context, particularly the workplace. Opportunity, supervision and the work environment can influence transfer. See Chapter 13.

Triangulation. Considering relevant evidence from more than one method or source to test a judgement. Several sources that merely repeat the same unsupported claim do not provide strong triangulation. See Chapter 8.

Validity. The extent to which evidence and reasoning support the intended assessment interpretation and use. A polished presentation rubric would be inadequate if it measured confidence while ignoring the occupational capability required. See Chapters 5 and 10.

Witness testimony. A record from someone positioned to observe relevant performance. It should identify the activity, occasion, apprentice contribution and basis of the witness's knowledge. See Chapter 8.

PRACTICE REFERENCE

Appendix D Standardisation casebook

Original exercises for assessor discussion, with reasoned responses.

These eight cases are fictional calibration exercises for coaches, assessors and internal quality assurers. The local teaching criteria are invented for this casebook; they are not official KSB wording or an awarding organisation's grading scheme. Read the submitted evidence and reach an initial decision before considering the suggested answer. In practice, the applicable specification, assessment plan and authorised assessment arrangements take precedence. The purpose of the discussion is to make the reasoning behind a decision visible, including what remains uncertain and what additional evidence would resolve it.

D.1 A brief answer that may be sufficient

Case. A project-controls apprentice is asked to explain why a report should distinguish committed expenditure from expenditure already incurred. The fictional local teaching criterion is: "Explain the distinction accurately and illustrate one consequence for interpreting a project's remaining budget." The apprentice submits the following short answer, with no diagram and no academic references. One assessor considers it too brief for the level of study; another believes it meets the criterion.

> *Money already incurred relates to goods or services the project has received or used, subject to the organisation's accounting treatment. A commitment records an obligation, such as an approved purchase order, even when the goods have not arrived. If our report shows only expenditure already incurred, a manager might assume that money already committed is still available for another purchase. I would therefore read the two figures together and check how our system avoids double counting when the commitment becomes actual expenditure. Otherwise, the apparent remaining budget could support a decision the project cannot afford.*

Decision. Should the coach accept the answer, request more words or require an additional worked example? A defensible decision is to accept the response for this particular knowledge criterion, provided the assessor is satisfied about authenticity and there are no further published requirements. The answer explains the distinction, illustrates its practical consequence and notices the need to avoid double counting. Its brevity is not evidence of insufficient thinking. Acceptance would not establish that the apprentice can operate the finance system accurately in practice.

Reasoning. The disputed issue is an assessor's expectation about length rather than a missing element of the stated criterion. Adding an unannounced word requirement changes the task after submission and risks rewarding repetition. A longer answer might offer further development, but that is different from evidence needed for acceptance. If the wider assessment requires comparison of accounting methods or a calculation, assess those requirements separately and transparently. Do not use the learner's study level as an undefined reason to reject a complete response. Apply the actual criterion and explain the limit of the resulting judgement.

Next action. Record the criterion as met and identify the relevant sentences in the rationale. Feedback might recognise the useful double-counting qualification and invite the apprentice to explore their employer's reporting conventions during future learning. Make clear that this is development rather than a condition of accepting the current answer.

D.2 A strong team output with unclear authorship

Case. A marketing apprentice submits a well-designed customer research report containing interview themes, a journey map and recommendations. The fictional local teaching criterion is: "Analyse customer information and explain how the analysis supports a proposed improvement." The report uses "we" throughout and lists a project team on its cover. The apprentice's annotation says, "I was involved in the research and learnt how to analyse customer needs." A manager's email adds, "The apprentice was a valued member of this excellent project."

> *We identified that customers struggled to understand the next step after making an enquiry. We grouped comments into themes and recommended a clearer acknowledgement message. The revised journey map shows the points at which customers need more information. The report demonstrates our ability to analyse feedback and make a practical recommendation.*

Decision. Can the analysis criterion be accepted because the report is strong and the manager endorses the apprentice? The appropriate initial decision is that relevant evidence is present but individual achievement is not yet established. Neither collaborative authorship nor a shared artefact makes the evidence invalid. The problem is the unresolved relationship between the report's analysis and the apprentice's own work. General praise does not resolve that question.

Reasoning. Several different contributions could sit behind "involved in the research". The apprentice might have designed the coding categories, transcribed interviews, booked participants or prepared the presentation. Each contribution has value, but they do not all demonstrate the specified analysis. A confident explanation in a permitted evidence-gathering discussion may clarify understanding and contribution, particularly when linked to working material. It should not become an opportunity for the coach to supply an analysis that the learner then repeats. The assessor needs enough evidence to make the intended individual inference, within the authorised assessment process.

Next action. Ask the apprentice to identify one theme they personally developed, explain how they grouped the underlying comments and show how that theme supports the recommendation. If available and appropriate, inspect a redacted working extract and obtain a focused account from someone who directly observed that contribution. Update the annotation to distinguish the apprentice's work from colleagues' work and the manager's approval. If their role was administrative, recognise that honestly and plan a suitable opportunity to undertake analysis. Record the criterion as awaiting evidence until the relevant gap is resolved.

D.3 A textbook summary presented as critical evaluation

Case. A project-management apprentice writes about selecting a supplier. The fictional local teaching criterion is: "Evaluate two feasible supplier-selection approaches and justify a choice for the stated context." The scenario involves a service whose quality is difficult to judge before delivery and whose failure would disrupt a time-sensitive operation. The apprentice names two recognised approaches, explains their general features and includes accurate references. Their conclusion states that the cheapest supplier should be selected because organisations need to control costs.

> *Competitive quotations help organisations compare prices, while a weighted evaluation allows several criteria to be considered. Both approaches support procurement decisions and should be carried out transparently. Competitive quotations are straightforward and help achieve value for money. Weighted evaluation considers quality as well as price, although it takes more preparation. I recommend choosing the lowest quotation because the project must stay within budget and this approach is simple for everyone to understand.*

Decision. Does correct description of two approaches satisfy the evaluation criterion? The response provides useful underpinning knowledge, but further evidence is required for the stated evaluative task. It identifies a difference between the approaches yet does not examine how the scenario's quality uncertainty and operational exposure should influence the decision. The recommendation rests on a general preference for low cost. The assessor should recognise the accurate explanation without treating it as a completed evaluation.

Reasoning. Evaluation requires the learner to use relevant considerations to reach a defensible judgement. The lowest quotation could be a reasonable choice in some circumstances, but the answer needs to explain why the risks and service requirements make it suitable here. A different conclusion should not automatically earn acceptance; simply replacing "lowest price" with "weighted evaluation" would still leave the reasoning incomplete. The learner needs to compare the consequences of the options, identify assumptions and explain the basis of the choice. The criterion concerns the quality of judgement, not agreement with the coach's favoured procurement method.

Next action. Ask the apprentice to compare how each approach would handle evidence of service quality, delivery reliability and total cost in this scenario. Invite them to identify one condition that would change their recommendation. Provide teaching on evaluation if these questions expose a conceptual gap, then use the permitted resubmission process. Feedback should explain that the existing descriptions are useful and the missing element is their application to the decision.

D.4 Presentation confidence creates a misleading first impression

Case. Two apprentices give separate presentations on options for introducing a new internal reporting process. The fictional local teaching criterion is: "Explain two options accurately, justify a recommendation using relevant constraints and respond accurately to a question about implementation." The brief permits notes and does not assess speaking speed, accent or performance style. The first apprentice speaks smoothly, uses attractive slides and recommends an approach without addressing its staffing requirement. The second speaks slowly, pauses to consult notes and explains both the staffing constraint and the reasons for the selected option.

> *First response to a question: "The team will make it happen because everyone understands the benefits. The system is easy to use, so staffing should not be a problem."*
> *Second response to a question: "We cannot assume that users will learn it during normal reporting. My recommendation depends on the manager releasing two staff members for the initial training and arranging cover. If that release is unavailable, I would propose a smaller pilot and review the timetable."*

Decision. Should the confident presenter receive the stronger judgement? On the supplied evidence, the second apprentice better demonstrates the stated criterion. The first may communicate attractively but has not addressed a material implementation constraint or answered the challenge adequately. The second provides a conditional recommendation and a realistic alternative. Hesitation does not invalidate the reasoning when fluent delivery is not the intended assessment requirement.

Reasoning. Presentation assessment can be distorted by confidence, visual polish and personal preference about speaking style. Return to the explicit criterion and record what each apprentice actually explained. If a separate criterion assesses audience engagement or professional oral communication, apply its stated features rather than treating charisma as a universal proxy. Any agreed access arrangements must also be respected. Notes, pauses or an alternative permitted response format should not silently become penalties. Equally, fairness does not require overlooking an occupationally relevant communication difficulty where the specified performance has not yet been demonstrated.

Next action. Give the first apprentice a focused account of the missing implementation reasoning and use the permitted further-evidence process. Recognise the second apprentice's accurate analysis and response; offer delivery development only where it is useful and clearly separate from the criterion decision. Preserve question-and-answer notes or appropriate timestamps so the judgement can be reviewed. During standardisation, assess the written response extracts before discussing presentation style.

D.5 A valuable reflection that cannot enter this portfolio

Case. An apprentice writes a thoughtful reflection on noticing an accessibility barrier in a customer information page. They explain how a user's feedback challenged their assumptions, identify a change they proposed and plan to check the revised page with users. The fictional local teaching criterion is: "Explain how feedback changed your understanding and identify a justified next action." For this exercise only, assume that the learner's applicable apprenticeship assessment plan expressly excludes reflective accounts and self-assessment from its required portfolio. It permits specified work products and other defined evidence types.

> *I had assumed that making the page shorter would automatically make it clearer. The feedback showed that the main difficulty was understanding the sequence of actions, not the amount of text. I proposed numbered steps and clearer explanations of unfamiliar terms. I do not yet know whether the change works because the revised page has not been tested. I will ask the authorised project lead to arrange feedback from users and compare the problems they identify with the original feedback.*

Decision. Should the coach reject the reflection, accept it for everything or make two separate decisions? The appropriate response is to accept the demonstrated learning against the local teaching criterion, if all relevant requirements are met, while excluding the document from this particular assessment portfolio. Educational value and portfolio admissibility answer different questions. A high-quality reflection does not override an express assessment-plan restriction. The restriction in this case must not be generalised to every apprenticeship.

Reasoning. The reflection explains a change in understanding, connects it with evidence and proposes a feasible next step without inventing impact. Those are strengths for developmental learning. However, the portfolio's purpose and permitted content are governed by the applicable plan. Renaming the reflection "evidence statement" would not resolve a substantive exclusion. Nor should the coach discard useful learning simply because its final destination differs. Preserve it in the appropriate training record and select admissible evidence for the assessment purpose.

Next action. Explain the two decisions clearly to the learner and check the plan's exact requirements. Where permitted, consider the actual page revision, a record of the apprentice's contribution and suitable evidence of subsequent user testing. Map only what these materials genuinely demonstrate and keep expected impact separate from observed results. Do not promise that one replacement item covers all communication or improvement requirements.

D.6 A learning log combines training, testing and administration

Case. An apprentice records 150 minutes of off-the-job training for one afternoon. The entry covers 35 minutes of new instructional video, 30 minutes of coached practice on a new occupational problem, 25 minutes of assignment writing applying the new theory, 15 minutes answering a test quiz, 20 minutes of targeted tutor teaching after a misunderstanding and 25 minutes uploading and arranging existing portfolio files. The fictional local teaching criterion is: "Explain the learning developed and provide an accurate activity record." Assume the relevant programme, working-time and other funding conditions are satisfied; this exercise focuses on the activity split.

> *I completed the online topic, passed the quiz and updated my portfolio. The whole session took 150 minutes. I now understand why a forecast should be reviewed when its assumptions change. My tutor helped me distinguish a changed assumption from a calculation error, and I applied that distinction to the practice problem.*

Decision. Can all 150 minutes be accepted because the reflection demonstrates learning? No. On the stated facts, 110 minutes relate to the identified new instruction, coached practice, learning assignment and subsequent tutor teaching. The 15 minutes of testing and 25 minutes of administrative portfolio compilation are excluded. The quiz result and the reflection do not convert those excluded components into eligible training. The split remains subject to evidence that the described activities and durations actually occurred.

Reasoning. Official guidance distinguishes new occupational learning from testing and portfolio compilation. Assignment writing can involve learning where the apprentice applies theory and develops new understanding or skills; it is not eligible merely because it is called an assignment. Likewise, discussing a misconception can be genuine teaching, but simply repeating the quiz remains testing. Here the facts explicitly describe a separate targeted teaching period, so it should be considered on that basis. Accurate recording requires the activity to be understood rather than accepted from its platform label.

Next action. Correct the log through the authorised process, preserving the reason for the amendment. Describe the relevant learning sufficiently and retain proportionate support for the actual durations. Give the apprentice a clear explanation of why the correction does not diminish the value of their progress. Improve future activity design so teaching, testing and administration are distinguishable at source. At standardisation, ask what evidence would be needed if the apprentice could not reliably separate the times, and avoid inventing a convenient retrospective allocation.

D.7 An authenticity concern needs a fair investigation

Case. An apprentice's submission contains two paragraphs closely resembling an online article, with no attribution. Other sections use a noticeably different style, and a software report also raises an automated-writing concern. The fictional local teaching criterion is: "Explain the selected concept accurately and apply it to your own workplace example." The provider has an academic-integrity procedure covering concerns, learner response, evidence review and decisions. The coach has not yet spoken to the apprentice or checked whether the overlapping text came from a supplied teaching extract.

> *The submission accurately describes the concept in two polished paragraphs. Its workplace application then says only, "This is relevant to our organisation because we need better processes." The apprentice's previous work used shorter sentences and included more concrete examples.*

Decision. Should the coach record plagiarism immediately, accept the technically correct explanation or pause the relevant judgement while investigating? The appropriate response is to identify a concern, preserve the evidence and follow the authorised procedure. The overlap merits examination, but the current information does not settle the circumstances or justify assumptions about every part of the submission. Style differences and software indicators should not be treated as conclusive proof of unauthorised authorship. Separately, the workplace application appears insufficient for the stated criterion even if authenticity is later established.

Reasoning. Fair assessment requires both an evidence-based judgement and a proportionate process. The learner may have copied material without understanding attribution, reused a provided extract, used permitted assistance incorrectly or engaged in misconduct. These possibilities do not all lead to the same response, and the coach should not choose between them by intuition. Ask neutral, specific questions about the source, drafting process and meaning of the explanation. Distinguish concerns about attribution, independent understanding and the quality of application. Avoid publicly labelling the learner or promising an outcome before the review is complete.

Next action. Retain the relevant source comparison and assessment record securely, consult the designated procedure and invite the apprentice's account through the appropriate route. Where permitted, ask them to explain the concept and discuss a concrete workplace example without coaching them through the answer. Record the resulting evidence and use the authorised decision, appeal and support arrangements. If the issue includes weak referencing knowledge, arrange teaching without assuming that teaching alone resolves any misconduct finding.

D.8 Progress is behind because the opportunity is missing

Case. A project apprentice repeatedly misses a task requiring them to contribute to a formal change review. The fictional local teaching criterion is: "Present an evidenced recommendation during a change review and respond to relevant questions." The learner has completed the preparation activities, can explain the process and has drafted a practice recommendation. Their employer has cancelled the relevant meetings and restricted apprentice attendance while a project is commercially sensitive. The progress dashboard marks the task overdue, and a coach proposes another written reflection to close the gap.

> *I understand what the review should consider and have prepared the comparison with my supervisor. I have not presented it because the last two meetings were cancelled, and I am not permitted to join the next one. I can describe what I would say, but I cannot provide a record of doing it. I am worried that another overdue task will make it look as if I have not tried.*

Decision. Should the learner be treated as disengaged, accepted on the basis of preparation or given a targeted opportunity plan? The third response is most defensible. The knowledge and preparation may support other relevant criteria, but they do not establish the specified performance. A further reflection cannot manufacture an opportunity that did not occur. The overdue status describes a scheduling problem; it does not explain its cause or prove lack of effort.

Reasoning. Diagnose the barrier before choosing the intervention. Here the learner's engagement and the employer's access constraints are separate from the outstanding competence evidence. The coach should preserve a clear standard while working with the appropriate employer representative to identify a feasible, authorised opportunity. An alternative project or appropriately arranged review may be possible. A simulation can only be used if the relevant assessment arrangements permit it; it should not be relabelled as workplace performance. If the gap cannot be resolved locally, it needs escalation through curriculum and programme-management arrangements.

Next action. Agree who will speak with the employer, what opportunity is being sought and when the position will be reviewed. Record the learner's completed preparation, the remaining performance requirement and the actual reason for delay. Update the learning plan through the authorised process and consider any implications for the wider programme timetable. Keep communication supportive and factual so the learner understands both their progress and the unresolved gap.

D.9 A five-minute group standardisation protocol

Use one case at a time with a facilitator and a brief decision record. During the first minute, each participant reads the fictional criterion and evidence independently. In the second minute, each records an initial decision and the exact evidence supporting it, including one uncertainty. During the third minute, compare decisions before reading the suggested reasoning; focus on the criterion rather than the learner's perceived attitude or the document's appearance. In the fourth minute, discuss the suggested answer and identify what additional fact could legitimately change the judgement. Use the final minute to record the agreed interpretation, one action for local practice and any unresolved issue requiring the authorised quality-assurance route.

The aim is a shared, defensible application of criteria rather than agreement for its own sake. If an important disagreement remains, preserve the competing reasons and seek the relevant specification or internal quality assurance advice. Do not manufacture consensus by voting away an assessment requirement. Keep a small bank of agreed examples with their context and version information so that future assessors can understand why the decision was reached. Revisit an example when requirements or evidence conditions change. Standardisation is useful when it improves the next real judgement and the feedback that follows it.

PRACTICE REFERENCE

Appendix E References and research notes

Research and official sources underpinning the handbook. All online sources checked on 12 September 2026.

E.1 Reading the evidence responsibly

This handbook uses educational research to inform professional judgement and official publications to identify applicable requirements. These sources answer different questions. Research about feedback does not determine funding eligibility; a funding rule does not establish the educational value of a particular feedback conversation. The study setting, research design and outcome measured matter when applying a finding to apprenticeship coaching.

The KBC assignment models, decision records, seven-question reflection framework, recovery examples and practice cases are original applications developed for this handbook. They are not externally validated instruments or reproductions of awarding-organisation assessment materials. SMART is used as a familiar planning aid; Doran's historical article is listed below, without implying that every later expansion of the acronym is his original wording.

The references are divided into works cited in the main discussion, additional scholarly reading, official requirements and qualification specifications. Publisher and DOI links identify the original works; some full texts may require institutional access. Online official and qualification sources were checked on 12 September 2026. Retrieve the applicable version again before making an operational decision.

E.2 Research use and limits

Source	Use in professional judgement	Limit of application
Biggs (1996)	Connect the intended outcome, activity and evidence.	Conceptual alignment does not validate a particular KBC brief.

Source	Use in professional judgement	Limit of application
Black and Wiliam (1998)	Use assessment information to adapt learning and teaching.	Classroom findings do not promise a fixed apprenticeship attainment gain.
Jönsson and Svingby (2007)	Use criteria, examples and assessor discussion to support consistency.	A rubric alone does not establish validity.
Hattie and Timperley (2007)	Make feedback informative about the task and improvement.	Effects depend on the feedback and its context.
Kluger and DeNisi (1996)	Examine whether comments direct attention productively.	Mixed interventions cannot determine the effect of every individual comment.
Carless and Boud (2018)	Help learners interpret feedback and act on it.	A conceptual framework does not validate a fixed coaching script.
Panadero (2017)	Discuss planning, monitoring and adjustment.	Different models should not become fixed learner labels.
Baldwin and Ford (1988)	Consider practice opportunities and workplace support.	An observed improvement does not establish that training alone caused it.
van Ginkel and colleagues (2015)	Plan presentation practice with clear expectations and feedback.	The synthesis concerns higher education; occupational demands still govern assessment.
Liang and colleagues (2023)	Treat detector scores cautiously when investigating authorship.	Findings concern particular historical detectors and datasets, not every current system.

E.3 Scholarly works cited in the handbook

Baldwin, T.T. and Ford, J.K. (1988) ‘Transfer of training: A review and directions for future research’, *Personnel Psychology*, 41(1), pp. 63-105. https://doi.org/10.1111/j.1744-6570.1988.tb00632.x

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E.4 Additional scholarly reading

These sources extend the themes in the handbook. Their inclusion is an invitation to further study, not a claim that the book reproduces or tests their full models.

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E.5 Official requirements and apprenticeship sources

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E.6 Qualification specifications and frameworks

City & Guilds (2025) *Level 3 and 4 Awards and Certificates in Assessment and Quality Assurance (6317-30/31/32/33/40/41/42): Qualification handbook*. Version 1.8, November 2025. https://www.cityandguilds.com/-/media/productdocuments/learning/training_and_development/6317/6317-level-3-and-level-4-centre-documents/6317_l3_l4_awards_certificates_qhb_v1,-d-,8-pdf.pdf

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E.7 Source-version index for operational decisions

Use the publication links above to retrieve the current document and its update history. The date of a webpage update does not by itself change the requirements applying to every existing apprentice.

Source	Version used here	Applicability check	Useful locator
Funding rules 2026-27	Version 3, July 2026	Original start and any expressly cross-cohort provisions	Paragraphs 2-4, 35-39, 82-103; Annex B
Funding rules 2025-26	Version 2, December 2025	Starts 1 August 2025-31 July 2026	Paragraphs 77-94
Funding rules 2024-25	Archived cohort rules	Starts 1 August 2024-31 July 2025	Paragraphs 84-86 and 97-98
OTJ training guidance	4 August 2026	Read the section for the apprentice's original cohort	Questions 12, 17, 26-27, 49, 52-64, 84-92
Assessment reform guidance	Updated 3 August 2026	Released plan and authorised transition	Implementation and transition; assessment plans
Ofsted FE and skills toolkit	Version 2.0	Inspections from 1 September 2026; provider category	Pages 1-2, 16, 35-38 and 46

Source	Version used here	Applicability check	Useful locator
ST0845 assessment plan	Version 1.1, 2025	Learner's recorded standard and plan version	Pages 6-7: portfolio
ST0310 standard	Version 1.5	Published version log and start dates	Version log
Behaviour verification guidance	Updated 21 July 2026	Applicable reformed assessment plan	Guidance on verification and evidence
Ofqual Handbook	Updated 11 September 2026	Regulated qualification and awarding-organisation arrangements	Section E level guidance; Section G, G6

For earlier starts, retrieve the relevant earlier rules rather than extrapolating from the nearest row. Save an identifiable copy of the source supporting a material decision, with the version and access date in the provider's normal record. Recheck qualification registration and certification dates before enrolment, and check an assessment plan before promising that a particular evidence type will be accepted.