



Initial Assessment Policy and Procedure Statement

Aims

The **School of Marketing** is committed to ensuring that all learners are assessed prior to commencement of their apprenticeship to ensure suitability and access to the programme. We implement a robust initial assessment system that is effective and consistent, ensuring equal opportunities, and identifies all support needs which enable effective learner progression.

The **School of Marketing** believes that by undertaking an initial assessment with each individual learner, we build a clear, accurate and realistic picture of their:

- current attainment(s)
- potential
- learning requirements/needs
- learning styles
- skills gaps/areas of improvement.

This supports the design, implementation and continual development of an effective Individual Learning Plan (ILP) and the identification of learning and assessment opportunities

Objectives

The initial assessment process is designed to:

- Assess learners' prior learning, Functional Skills and understanding to ensure eligibility for the chosen apprenticeship.
- Undertake initial assessment to ensure that learners are on the most appropriate programme and therefore gather information to support the learners' experience.
- Identify the most appropriate referral for any individual that has been identified as not suitable for an apprenticeship.
- Implement the most appropriate methods of assessment based on the individual circumstances and targeted training course.
- Understand the individual learner's personal circumstances in key areas.
- Ensure the individual learner is fully informed throughout the initial assessment.
- Ensure the individual learner and employer are able to offer skills development in relevant areas.

Range and scope of the policy

This policy is designed to cover all apprenticeship related courses delivered by the **School of Marketing**. It can also be used to support other programmes offered where the use of initial assessment is required.



Roles and Responsibilities

The **School of Marketing** is responsible for ensuring that all employees involved in the delivery and assessment of learners undertake appropriate and relevant training, supervision and support regarding the policy, their role and responsibilities.

The Managing Director is responsible for ensuring that a copy of this document is available to all employees and that the policy and procedures are reviewed annually.

The Head of Apprenticeship and QAM is responsible for ensuring the adherence of this policy by all employees.

The Product Director is responsible for ensuring this policy is available to learners and employers on the website.

Individual employees must follow this policy and enable appropriate support to the learner(s) - failure to do so may be considered as an act of misconduct and may result in disciplinary action.

Procedure

The Initial assessment focuses on the key areas of the standard/qualification criteria and allows the **School of Marketing** to be confident in providing the most appropriate training for the learner.

Employees must always put the learner at the centre of the initial assessment process, as the process is an important part of the tutor/assessor gaining a holistic understanding of the learner.

The Initial meeting with the learner must be facilitated by the **School of Marketing** through the completion of a number of initial assessments these include (where appropriate).

- **Learning Styles Assessment:** to discover the learners preferred styles of learning, which can inform use of different resources in the early stages of the programme. It is important not to rely too heavily on this particular assessment as 'pigeonholing' a learner's learning style may be detrimental to their progression and successful completion of the course. Whereas continual assessment and discussion will support the learner to develop learning skills and inform learning needs.
- **Functional Skills Initial Assessment (BKS/ForSkills):** to discover current levels of attainment in maths and English and inform a starting place for further appropriate diagnostic assessments (BKS).
- **Candidate Initial Profile (Self-Assessment),** which includes discussion about:
 - Occupational background (if appropriate)
 - Current levels of qualifications/Courses attended
 - Further training and experience needed
 - Assessment needs
 - Learning/Training needs - Differentiation / Support needs
 - Training needs

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- Resources/support needs
- Objectives and outcomes that the learner wants to achieve
- **Skills scan analysis:** this activity is undertaken as part of the initial discussion with the learner and employer and apply to specific standards/qualifications. The purpose is to outline the mandatory and optional units/modules for the occupational standard. It identifies the criteria which is required to meet the outcomes of the apprenticeship including maths and English.

The learner should be encouraged to discuss their individual requirements with their employer and **School of Marketing** tutor. This should include undertaking assessments to confirm their literacy and numeracy levels, cognitive function, and career aspirations. The results of this initial assessment should then be recorded and discussed with the learner to ensure that they fully understand the process and outcomes.

It is also possible that a learner may have personal issues which impact their wellbeing, and this should be addressed during this initial discussion. For example, homelessness, behavioural difficulties, medical conditions etc. need to be identified at the earliest opportunity so ways can be jointly found to either overcome the issue and/or find alternative solutions.

Learner Apprenticeship Guidebook/Onboarding Guide: During the period of 'sign up' the employer, learner and designated tutor from the **School of Marketing** contribute to the induction and onboarding process.

During this stage:

- The preferred learning style of the learner is identified, highlighting their preference and any potential barriers they may have to learning.
- Discuss the learner's overall career goals against the qualification to ensure that it is appropriate for them.
- Explore the maths and English elements covered within the qualification in terms of what is expected of them, and levels required to complete the qualification. This will identify if the learner is required to undertake any maths and English qualifications to meet the EPA requirements.
- The employer is asked to confirm that the learner will be given the opportunity to experience each of the knowledge, skills and behaviour required (including a min 20% OTJ).
- Undertake a 'scoring process' against each element of the standard to confirm the learner's level of prior knowledge and current skills. It also helps to tailor the training programme to meet the individual needs of the learner, and identify any skill gaps, and allow for a plan to be formulated at this stage how this will be monitored and delivered throughout the learning programme.
- On completion of the induction/onboarding process the learner, employer and tutor should all confirm their commitment and identify any specific areas of personal development to be incorporated into the delivery process.

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BKSB/ForSkills: are online assessment tools which learners can undertake to assess current levels of literacy and numeracy skills, whilst identifying any possible additional learning needs in this area. Whilst this assessment tool is a starting point for all learners, it also creates a journey of learning specifically targeting areas of development to support each learner to develop their numeracy and literacy skills. It provides an indication for the learner if they have the correct levels to complete their desired apprenticeship or support to sign post to alternative provision to support with these elements.

Tutor/Assessors must have a comprehensive understanding and awareness of other types of assessment available to them which include:

- Discussion regarding social needs
- Records of achievement (qualifications and courses).
- Discussion of learning outcomes.
- Observations of learner's working practice.
- Records of any learning needs/support

Summary of key points

Initial assessment is an essential tool which is used to inform the social, physical and learning development needs of the learner. It helps you to build a relationship with the learner which should be used as a starting point for the ILP.

If additional learner support is identified, it should be discussed with the learner's line manager (employer) to confirm that appropriate resources are made available. There may be times when it is not possible for the **School of Marketing** and/or the employer to meet all required learner needs. In such cases learners will be referred to specialist, partner organisations for support needs.

It is important to implement effective communication processes so that the employer understands where and how they can support the learner with their needs, between the planned visits with the **School of Marketing** tutor/assessor.

The initial assessment and skills scan should be used as a 'live document' and should be revisited during the programme as a review tool, which will help identify 'distance travelled'. These 'reviews' are often referred to as a 'Progress Review' which are a three-way review process which happens every 2-3 months and provides an overall picture of the apprentice's progress; recapping on the individual's personal learning record against each element of the framework or standard learning plan.

In conclusion, initial assessment helps you to ascertain the learner's learning and support needs including ways in which the learner is likely to learn most happily and effectively and the kind of help they will most value.

