

Initial Assessment Policy & Procedure

Introduction

The staff and management of Tolley recognise that the quality of initial assessment is the key to success in the delivery of all qualifications and training. This policy aims to ensure that the initial assessment practice within the organisation is a continuous process carried out with rigour and credibility.

The initial assessment is one of the most important aspects of a learner's programme and is an individualised and challenging learning programme which continues to increase learners' knowledge, behaviours, and skills.

Tolley expects all learners to go through a relevant initial assessment so that their needs can be clearly identified and a suitable plan of learning instigated. It is critical that Tolley can measure the progress of all learning journeys and to facilitate this the individual starting point for each learner is identified and forms the basis of a personalised programme for each learner. Results from the initial assessment are recorded within the Individual Learning Plan and are referred to throughout the learner's programme.

The Tolley Initial Assessment programme comprises the following:

- English Assessments (initial)
- Mathematics Assessments (initial)
- Occupational Skill Scans
- Initial Application Form, including learner job description

All members of the apprenticeship team are trained in this process and are available to assist colleagues in interpreting results or providing guidance on how or where to access additional or bespoke support for a learner.

No new Initial Assessment tools should be introduced unless approved by the Board.

Apprentices and employed learners

All apprentices must complete the Tolley Apprenticeship Application Form, Skills Scan, and undertake the Maths and English initial assessment tests. Apprentices should be aware of why they are doing the initial assessment, how the results will be used, and the potential support available to address learning requirements.

The initial assessment will be carried out remotely and will be supported by the employer. The initial assessment will establish an apprentice's:

- Currently assessed abilities in English and Maths;
- Job role in relation to the vocational qualification;
- Starting point and identified gaps in knowledge, skills and behaviours;
- Needs in terms of learning and development;
- Additional and personalised support requirements .

There are specific Initial Assessment guidelines available to support the tutors and apprentices through this process; these are located in the Shared Drive.

On completion of the onboarding processes (i.e. Initial Assessment, Learner and Employer discussions, and agreement of the Service Level Agreement (SLA)), all information will be formally recorded in an Individual Learning Plan (ILP) and discussed with the apprentice. The ILP will be approved and signed by the apprentice, employer, and Tolley in

a commitment statement, following agreement of specific learning, development and support, along with the Delivery Model.

Where an apprentice does not hold an approved level 2 English and Maths qualification, additional funding and support may be available. If it is believed that the apprentice will benefit from additional learning support (ALS), the apprenticeship team will propose a bespoke learning and support plan, identifying the type of support that will be provided, the duration, and the potential impact. The team will then process the relevant Learning Support Plan and apply ALS funding.

ALS funding may also be claimed if an apprentice's circumstances change or if we identify any specific challenges or barriers to participation or achievement.

Further guidance and relevant documentation for additional learning support is contained in this handbook.

Tutors and Client Service Team

New employees are also required to complete the initial assessment as part of their induction programme. A training programme will then be tailored to meet their learning needs. All tutors are required to attend any update training on new resources agreed by the organisation.

Development of functional skills will be monitored and assessed throughout the apprenticeship plan.

Further support

If tutors require any additional guidance regarding the initial assessment procedure or the identification of additional learning support needs, they are advised to speak with the Director of Tax Apprenticeships.



Jonathan Scriven – Director of Tax Markets