

PROGRESS REVIEW FRAMEWORK

Team leader

ST0384 · Level 3 · Business and administration

Structured review schedule, agendas and intervention triggers

STANDARD

ST0384

VERSION

1.4

LEVEL

3

GENERATED

30 March 2026

DURATION

15 months

MIN. HOURS

348 hours

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Progress reviews for the Team leader apprenticeship should be used as structured three-way conversations that check whether the apprentice is ready for the next stage of leadership practice, not just whether learning activity has been completed. They should connect workplace performance to the programme's phase structure, the current KSB focus, and the apprentice's readiness for gateway at month 15. The regulatory purpose is to review progress against the agreed training plan at least every 3 calendar months, with the employer and provider both contributing. For this occupation, reviews work best when they focus on real operational control: how the apprentice is organising work, leading people, handling performance, using data, applying policy, influencing stakeholders, and gradually taking greater accountability.

Review Schedule

Review 1: Settling into the team leader remit (Month 2)

- Role clarity and decision-making boundaries
- Professional conduct and reliability in routine work
- Ownership of workload and personal development
- Early understanding of how the role supports team goals

KSBs expected and evidence to review at this point are in the Progress Milestones section.

Review 2: Organising work, time and resources reliably (Month 4)

- Prioritising and sequencing day-to-day work
- Using planning tools to coordinate activity
- Making sensible choices about time, budget and resources
- Keeping routine operations on track with minimal prompting

KSBs expected and evidence to review at this point are in the Progress Milestones section.

Review 3: Coaching performance and building capability (Month 6)

- Setting clear expectations and monitoring follow-through
- Giving feedback and supporting improvement conversations
- Spotting development needs in the team
- Handling people issues with fairness and inclusion

KSBs expected and evidence to review at this point are in the Progress Milestones section.

Review 4: Using data and influencing with evidence (Month 9)

- Turning operational information into useful insight
- Writing and presenting clear updates for different audiences
- Using evidence to influence decisions and next steps
- Managing competing priorities and stakeholder expectations

KSBs expected and evidence to review at this point are in the Progress Milestones section.

Review 5: Applying policy, managing projects and improving delivery (Month 12)

- Applying policy and legislation in live situations
- Tracking projects or change activity and responding to risk
- Reviewing processes for inefficiency or waste
- Acting with greater judgement and consistency

KSBs expected and evidence to review at this point are in the Progress Milestones section.

Review 6: Operating as an independent, strategic team leader (Month 15)

- Linking team activity to organisational priorities
- Responding to external change and sustainability pressures
- Leading inclusively across people, performance and stakeholders
- Demonstrating readiness for gateway through consistent occupational performance

KSBs expected and evidence to review at this point are in the Progress Milestones section.

Review Agenda Template

Before the Review:

- Trainer reviews the current training plan, OTJ record and recent workplace evidence against the programme phase and milestone.
- Apprentice reflects on recent wins, challenges and examples of leadership decisions they have made.
- Employer identifies current business priorities, live opportunities to stretch the apprentice and any concerns about performance, workload or behaviour.

During the Review:

1. Progress against the current milestone and whether the apprentice is operating with the expected level of independence.
2. Examples from live work: planning, leading, communicating, handling performance, using data, or applying policy.
3. What is helping progress, what is getting in the way, and whether the workplace exposure is broad enough for the next stage.
4. Any adjustments needed to planned learning, workplace opportunities or support to keep pace with the programme.
5. Readiness for the next phase, including whether the apprentice is building towards sustained occupational competence rather than isolated task completion.

After the Review:

- Agree a short, realistic action list for apprentice, employer and provider.
- Update the training plan where the scope, timing or workplace opportunities need to change.
- Record any additional support, stretch activity or reassessment of pace.
- Share the review summary with all parties and keep the progress record current for the next review point.

Attendees

Apprentice

Brings current workplace examples, self-assesses progress, agrees actions and flags where they need more support or stretch.

Typical attendance: Always attends.

Line manager / workplace mentor

Confirms what the apprentice is doing in role, gives feedback on performance and behaviour, and agrees future workplace opportunities.

Typical attendance: Always attends, virtually or in person.

Provider tutor / coach

Leads the curriculum conversation, tests progress against the milestone, and links workplace experience to planned learning.

Typical attendance: Always attends.

Employer representative with operational oversight

Contributes business priorities, validates progress in role and helps secure suitable opportunities for leadership practice.

Typical attendance: Attends most reviews; particularly useful at months 6, 9, 12 and 15.

Additional specialist input, where needed

Provides targeted advice on areas such as HR policy, project delivery, data systems or sector-specific regulation.

Typical attendance: Occasional attendance when the apprentice's current work requires specialist context.

Review Concern Indicators

The apprentice can describe tasks they have completed, but cannot explain the decisions behind them.

What this likely means: They are still operating as a task-doer rather than a developing team leader.

Suggested response: Reduce the scope of new work, coach them to explain priorities and choices, and give a live decision-making example to work through.

Work plans, rotas or actions slip repeatedly without the apprentice spotting it early.

What this likely means: They are not yet controlling workload, time or resource pressure confidently.

Suggested response: Revisit planning tools, require earlier check-ins on live work, and practise prioritisation using current team activity.

Performance, coaching or difficult conversations are avoided, overly scripted or lack follow-up.

What this likely means: They have not yet translated people skills into consistent leadership behaviour.

Suggested response: Use observed workplace conversations, rehearse feedback language, and set a small number of real people-management responsibilities.

Reports or updates contain lots of activity but little interpretation or recommendation.

What this likely means: They are collecting information but not yet using it to influence decisions.

Suggested response: Ask them to compare options, identify patterns and present a clear recommendation with a reasoned next step.

The apprentice struggles to explain how policy, inclusion or change applies in their own team.

What this likely means: Learning is still theoretical and not being applied consistently in live operational settings.

Suggested response: Use current workplace scenarios, strengthen employer examples, and link the next phase of learning to real team issues.

OTJ Tracking

At each review, check OTJ progress cumulatively against the agreed training plan and the current phase, rather than treating hours as a separate administrative exercise. The most useful evidence is a simple trail showing what was learned, how it was practised in paid hours, and what changed in the apprentice's job performance. Sample a small number of recent activities across the period, such as taught sessions, guided practice, shadowing, coached workplace tasks, and time used to complete learning tasks or reflect on feedback. Make sure the record distinguishes off-the-job learning from progress reviews, on-programme tests and normal job duties. If the apprentice is part-time or has prior learning, the review should confirm the planned hours still remain realistic and that progress to date matches the reduced or adjusted delivery plan. The key question is whether the apprentice is getting enough high-quality off-the-job learning to build occupational competence by gateway.

Employer Review Guidance

Use the employer conversation to test whether the apprentice is performing like a developing team leader in real conditions. Ask what the apprentice is now doing with less prompting, where they are still dependent on support, and which situations reveal judgement, confidence or resilience. Focus on live operational questions: Can they plan work for the team? Can they give feedback or handle challenge? Are they using data to make better decisions? Can they represent the team with other functions? What upcoming work will stretch them into the next phase? The best employer input is specific and behavioural, not just a general view that the apprentice is 'doing well'. Where progress is uneven, agree what workplace exposure, responsibility or feedback will help them move forward before the next review.

Documentation Expectations

- Current training plan with the latest agreed milestones, delivery focus and workplace opportunities.
- Signed progress review summary showing what was discussed, what changed and what each party will do next.
- Up-to-date OTJ learning record or tracker with the cumulative hours and a brief note on the main learning activities completed.
- Short record of employer feedback on workplace performance, responsibility and any upcoming stretch opportunities.
- Any updated support notes where pace, confidence, attendance, behaviour or workplace context is affecting progress.
- Phase or milestone tracker showing the apprentice's current position in the programme sequence.
- Evidence that previous review actions have been revisited and either completed or carried forward.