

Guide to Tri-Partite Reviews for Apprentices and Employers

What is a Tri-Partite Review?

A tri-partite review, or progress review, is a scheduled meeting between an apprentice, their employer, and the apprenticeship provider to measure the apprentice's progress against their apprenticeship learning plan.

Tri-partite reviews will most likely be conducted as an online video meeting, or in-person if operationally convenient for all parties.

The DfE funding rules outline the frequency and discussion points that a tri-partite review must, at a minimum, cover. This guide will outline these requirements, plus all other University of Cumbria requirements for a successful and meaningful tri-partite review.

Who needs to attend?

- The apprentice
- The apprentice's work-based mentor (typically a line manager or workplace supervisor)
- The apprentice's personal tutor (a designated member of the programme team)

It is important that all three parties attend and contribute to every tri-partite review.

Frequency

Your first tri-partite review will be scheduled within the first six weeks of the apprenticeship. After this, the DfE Apprenticeship funding rules state that tri-partite reviews must be completed at least every three calendar months. This means if a review is completed in January 2026, the next review must be completed by 31st April 2026 at the latest.

Tri-partite reviews can be more frequent than this when needed, if an apprentice requires further support to progress and meet the goals on their learning plan.

Why do tri-partite reviews take place?

Tri-partite reviews are a mandatory element of an apprenticeship, ensuring that learning, progress, and development are supported, tracked, and evidenced.

Tri-partite reviews are milestones within the apprenticeship, and allow for:

- A review of progress to date.
- A review of off-the-job training, particularly workplace training outside of the provider's control.

- A review of the overall progress of the apprentice against their agreed training plan.
- An opportunity to update the training plan (particularly if new training is added or removed, or the end date of the apprenticeship is changed).
- An opportunity to discuss and resolve any concerns or issues any party may have.
- An opportunity to provide feedback

What is discussed during the tri-partite review?

- The apprentice will be given SMART targets and goals, agreed upon by all three parties, to be reviewed in the next tri-partite review.
- A review of the apprentice's off-the-job training, discussing and agreeing any recorded off-the-job training evidence submitted since the last tri-partite review.
- The welfare of the apprentice and identify and discuss any concerns the apprentice or employer may have.
- A review of progression against the knowledge, skill, and behaviour standards of the apprenticeship.
- A review of the SMART targets and goals agreed on in the last tri-partite review.
- A review of the apprentice's maths, English, and digital skills during the apprenticeship.
- A review of attendance and punctuality during the apprenticeship, including both university attendance and workplace attendance.
- A review of any submitted assignments or pieces of work, discussing feedback and feedforward.
- A review of the apprentice's university and workplace learning, discussing what is going well, and what could be improved upon.
- Raise awareness of and discuss British values, prevent, health and safety, and equality, diversity, and inclusion.
- A discussion of the apprentice's goals during and after the apprenticeship, and how these may be achieved.
- A review of overall progress on the apprenticeship programme so far, and a RAG rating (red, amber, green) to reflect how the apprentice is currently progressing.
- The date and time for the next tri-partite review.
- Agree any actions for the next tri-partite review.

Regulatory Requirements

- All three parties must attend and contribute to tri-partite reviews.
- Tri-partite reviews must be conducted regularly, at least every three calendar months.
- Comprehensive records of the discussions must be kept and signed by (at minimum) the provider and the apprentice.
- Tri-partite reviews must evidence discussion of progress against the learning plan, and any changes or updates to the learning plan.
- Tri-partite reviews must support and encourage the apprentice to in their apprenticeship, and identify ways to achieve this success.