



Learner	Ellie Turner
Manager	Mark Dawson
Assessor	Rachel Okafor
Qualification	Business Administrator (ST0070 v1.0)
Review date	20 May 2026
Next review date	—
Start date	6 Jan 2026
End date	6 Jul 2027
Programme duration	18 months
OTJL hours to date	145 hrs

Compliance Checks

Has off-the-job training been evidenced and authenticated? (Assessor to check OTJL)

Yes

OTJ log reviewed: 145 hours logged to date.

Has the learner taken on any other funded training with another training provider

No

Have there been any changes to the programme or training assessment plan?

No

Are there any safeguarding or Prevent issues?

No

Training Conditions

Has the learner had any absences from work or training including missed appointments in the last 10 weeks?

No

Has the learner had any accidents in the past 12 weeks?

No

Has the learner significantly changed work roles or supervisors in the past 12 weeks?

No

Has the learner received additional IAG in the last 10 weeks?

No

Is the learner's PPE appropriate and in good condition?

N/A

Is the learner currently receiving Additional Learning Support?

No

Does the learner feel they require additional support?

No

Have all previous actions from the last review been achieved?

Yes

All actions from the last review completed.

SMART Targets

Targets are SMART — Specific, Measurable, Achievable, Realistic, Time Bound. Outstanding targets from the previous review are carried forward automatically.

SMART Target 1 ACHIEVED

Complete a professional discussion on stakeholder management, ready to evidence K3.1 to K3.4.

By: 29/07/2026

SMART Target 2 ACHIEVED

Shadow the finance team for a day to observe the month-end process.

By: 29/07/2026

Off the Job Target ACHIEVED

Log at least 6 hours of off-the-job training each week, with evidence uploaded to the portfolio.

By: 29/07/2026

Personal Development and Life Skills

Attend the employer's confident communication workshop and reflect on what you learned.

By: 29/07/2026

Equality and Diversity

Complete the equality, diversity and inclusion refresher and discuss one key learning point at the next visit.

By: 29/07/2026

Safeguarding

Name your workplace's designated safeguarding lead and explain how to report a concern.

By: 29/07/2026

Personal Development Targets ACHIEVED

Build confidence presenting updates in the weekly team meeting.

By: 29/07/2026

Action Programme**Programme progress to date**

Ellie continues to make strong progress. Evidence is being submitted regularly and is of a good standard, and Ellie has taken on more responsibility at work since the last review.

Overall RAG rating

Green

List KSBs with evidence mapped

- S1.1 - Skilled in the use of multiple IT packages and systems relevant to the organisation in order to: write letters or emails, create proposals, perform financial processes, record and analyse data. (write letters or emails, create proposals, perform financial processes, record and analyse data)
- S1.3 - Able to update and review databases, record information and produce data analysis where required.
- S1.2 - Able to choose the most appropriate IT solution to suit the business problem
- S2.1 - Produces accurate records and documents including: emails, letters, files, payments, reports and proposals.
- S2.3 - Drafts correspondence, writes reports and able to review others' work.

Functional Skills**English**

Ellie writes clear, professional emails and reports. English is being developed naturally through portfolio evidence.

English RAG rating

Green

Maths

Maths is applied through invoice checks, budgets and data reports. No concerns.

Maths RAG rating

Green

KSB Review**Knowledge**

Has developed a good understanding of stakeholder relationships and data protection, applying both confidently in day-to-day work.

Skills

IT skills have improved noticeably, particularly in Excel. Now producing accurate reports with little supervision.

Behaviours

Consistently professional, punctual and positive. Takes feedback on board and acts on it.

Positives

Took the lead on a small project and delivered it on time.

LEARNER SECTION**Learner comments**

The discussions with my assessor really help me link what I do at work to the standard.

EMPLOYER SECTION**Employer comments**

Doing well. We have agreed to protect some time each week for study.

SIGNATURES**Assessor**

Name: Rachel Okafor

Date: 20/05/2026

**Learner**

Name: Ellie Turner

Date: 21/05/2026



Employer

Name: Mark Dawson

Date: 21/05/2026

M. Dawson