Individual Training Plan

PART A

2025/26

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Student Details

Name:	
Job Title:	
Contact details:	

Standard:	Chartered Manager Degree Apprenticeship	**Code:**	STO272	**Level:**	6

If Change of Circumstance, tick relevant box: Change of Cohort ☐

Change of Employer ☐ Return from Break in Learning ☐ Recognition of Prior Learning ☐

Start Date: (or date of change)		**Planned End Date (Gateway):**	
		Planned End Date (EPA):	

Contact Details

EMPLOYER DETAILS	
Name:	
Address & Postcode:	
Contact Name:	
Telephone:	
Email:	

TRAINING PROVIDER DETAILS	
Name:	University Centre Quayside Ltd
Address & Postcode:	Quayside i-4 Albion Row Newcastle upon Tyne NE6 1LL
Academic Programme Lead:	Andy Price
Telephone:	0333 0048 470
Email:	andy.price@ucq.ac.uk

The Individual Learning Plan (ITP) outlines a programme of learning agreed between University Centre Quayside (UCQ), the Employer and the apprentice. This ITP is supported by the Schedule detailing all key dates, Individual Curriculum Plan (Part B) and their Ecordia online portfolio (Part C), which is updated throughout the student journey. **Progress reviews** will be planned every 12 weeks. This will be a tripartite discussion (UCQ, employer and apprentice) to discuss progress to date against the training plan and immediate next steps required. Records will be retained within Ecordia (Part C).

Apprentice Privacy Notice

The Apprentice Privacy Notice was provided in full on your Apprenticeship Application Form. A copy can also be accessed at https://guidance.submit-learner-data.service.gov.uk/ilrprivacynotice

Please select your preferred option with regards to the sharing of your information on the Student Record System (LRS):

☐ I have seen the privacy notice and **agree** for my information to be shared on LRS
☐ I have seen the privacy notice and **do not** agree for my information to be shared on LRS

Qualifications required as part of the standard

As part of the Chartered Management Degree Apprenticeship you will complete 16 modules as below:

Year One: Level 4 modules

Module 1.1 Academic Writing and Study Skills
Module 1.3 Effective Communication
Module 1.2 Leadership
Module 1.4 Marketing
Module 1.5 Decision Making
Module 1.6 Management in Practice: Developing Self and Others

Year Two: Level 5 modules

Module 2.1 Managing People
Module 2.2 Finance for Managers
Module 2.3 New Technologies
Module 2.4 Digital Business
Module 2.5 Stakeholder Relationship Development
Module 2.6 Management in Practice: Developing Self and Others

Year Three: Level 6 modules

Module 3.4 Management Research Project
Module 3.2 Project Management
Module 3.1 Strategy and Change
Module 3.3 Management in Practice: Developing Self and Others

Functional Skills Progression

Apprentices aged 19+ will no longer be subject to the mandatory requirement to study towards and achieve English and maths. The apprentice (or their employer) can still choose to study towards an English and maths qualification at Level 2 and this will be funded.

All functional skills qualifications are fully-funded by the Department for Education.

Assessment Arrangements

End-point assessment required: Yes ☑ No ☐

End-point Assessment Provider Details:

Name of Provider	The Chartered Management Institute
EPA Code:	EPA0026
Address	77 Kingsway, London, WC2B 6SR
Telephone	020 7497 0580

Planned Off the Job Training

Each module will take a specific number of hours, to be completed Off the Job during normal working hours. To be eligible for government funding, all apprentices must spend a minimum number of hours over the planned duration in off-the-job training – this is detailed below.

Off the Job Training Entitlement	
Weeks on Programme	156
Minimum OTJ Entitlement	**926**

Off the Job Training Planned				
Modules (All Modules Delivered by UCQ)		**Mode of Delivery**	**GLH Hours**	**OTJ Hours**
Module 1.1	Academic Writing and Study Skills	2 x 6-hour lectures per Module, individual and group tutorial time and directed independent learning, delivered over a 7 week period. Directed independent learning will include practical workplace training, shadowing, mentoring as required and planned in the Individual Curriculum Plan (Part B). A full schedule of dates will be provided.	50	50
Module 1.2	Leading People		50	50
Module 1.3	Effective Communication		50	50
Module 1.4	Marketing		50	50
Module 1.5	Decision Making		50	50
Module 1.6	Management in Practice		50	50
Module 2.1	Managing People		50	50
Module 2.2	Finance for Managers		50	50
Module 2.3	New Technologies		50	50
Module 2.4	Digital Business		50	50
Module 2.5	Stakeholder Relationship Development		50	50
Module 2.6	Management in Practice		50	50
Module 3.1	Strategy and Change		60	60
Module 3.2	Project Management		60	60
Module 3.3	Management in Practice		60	60
Module 3.4	Management Research Project	3 x 6-hour lectures, individual and group tutorial time and directed independent learning, delivered over a 39 week period	180	180
English Functional Skills Level 2*		Individual tutorial time and directed independent learning	25	0
Maths Functional Skills Level 2*			25	0
		Total	1010	**960**

* Not applicable where the student is already qualified to Level 2

Minimum contracted hours, including time spent on off the job training, is 30 hours.

Outcome of Initial Assessment

The student's current competence against the knowledge, skills and behaviours required to achieve the standard has been assessed through the completed initial assessment activities. The activities included:

- Reviewing student eligibility in line with the Department for Education current funding rules using the completed Application Form
- Recognition of prior learning and experience:
  - Prior qualifications achieved
  - Prior experience using the completed Initial Knowledge, Skills and Behaviour (KSB) self-assessment against requirements of the Apprenticeship Standard

Outcome

Eligibility	The student is eligible for Apprenticeship funding in line with the current funding rules.
Prior Qualifications	The student has not undertaken duplicated training which impacts on recognition of prior learning in line with UCQ Initial Assessment Policy.
Prior Experience	The student has no significant prior experience and the Apprenticeship Standard is appropriate for the student in line with the UCQ Initial Assessment Policy.
Learning Support	There are currently no identified learning support requirements. There will be support made available where this is required.
Support for English and Maths	The student is exempt from the Functional Skills requirement of the Apprenticeship Standard. Support to develop English and/or maths will still be provided in line with the student's need. OR - REMOVE AS REQUIRED The student is not exempt from <English and/or maths> Functional Skills as part of

Functional Skills Qualification(s):

English: UCQ Confirmation: Exempt – not required ☐ Student Confirmation: -

Maths: UCQ Confirmation: Exempt – not required ☐ Student Confirmation: -

Recognition of Prior Learning

The initial assessment results above have informed this training plan. In line with UCQ Admissions and Recognition of Prior Learning Policies, this has been reviewed to identify and quantify the student's prior learning. In agreement with the student and the employer, we confirm the below and that the apprenticeship meets the funding rules in relation to the minimum duration and off-the-job training:

Relevant prior learning to be taken in account	Yes ☐ No ☐		
If yes *, what RPL percentage agreed as a percentage of required OTJ training hours:		New planned off the job training total:	
Details of RPL (including Module numbers)			

* An updated Schedule 8 with reduced Total Negotiated Price and updated Off the Job Training Plan will be agreed and signed.

Roles & Responsibilities

1. General

1.1 UCQ has agreed with the Department for Education (DfE) to provide training programmes in accordance with government requirements.
1.2 This agreement is made between UCQ, the named Employer and the named Apprentice.
1.3 This agreement shall take effect from the date of exchange of signed copies of the agreement.
1.4 A minimum of 14 days' notice by either party will terminate this agreement. Either party may terminate the contract forthwith in the event of any breach of its terms by the other party.

2. The Apprentice's Responsibilities

2.1 To work for the Employer to the best of her/his ability and in accordance with the Employer's policies and procedures.
2.2 To observe the Employer's terms and conditions of employment and Apprenticeship Agreement.
2.3 In both working and training, to be diligent and punctual, keep records, take part in, and contribute to the review process, undertake assessments and training as agreed in order to achieve Apprenticeship Plan objectives and keep the Employer informed of progress towards those objectives.
2.4 To commit to attendance at their off-the-job training.
2.5 Be respectful of colleagues, employers, teaching staff in accordance with the Main Provider, the Delivery Sub-contractor (where applicable) and workplace policies.
2.6 Negotiate achievable learning targets and milestones in conjunction with Assessors, Tutors and Employer, and to undertake to achieve these objectives and outcomes within an agreed timescale.
2.7 Keep the Employer informed of progress towards these objectives.
2.8 Notify the Employer and the Provider as soon as possible of non-attendance at either scheduled training sessions, reviews or other planned meetings
2.9 Inform the Employer and the Provider of any health issues which may affect their learning.
2.10 Notify the Employer and the Provider of any change of circumstances which may affect their ability to work or study.
2.11 Behave in a safe and responsible manner and in accordance with the requirements of Health and Safety legislation relating to the individual's responsibilities and to promote and act in the Employer's best interests at all times.
2.12 To adhere to all UCQ student policies, in particular to those involving Safeguarding and the Prevent Duty (https://ucq.ac.uk/safeguarding-and-prevent/)
2.13 To adhere to the requirements and expectations of the student laid out in GP-004 Apprentice Handbook and General Regulations for validated awards of The Open University.

3. The Employer's Responsibilities

3.1 The plan of learning and assessment (Schedule) forms part of this document, you will be issued a copy. The Employer is expected to facilitate the learning opportunities in line with the training plan and in agreement with UCQ, and allow the minimum off-the-job entitlement (see page 5) to be spent in off-the-job training during normal working hours and to agree with the Provider (and where appropriate provide evidence) the delivery of this off-the-job entitlement. Where an Apprentice may need more than the minimum entitlement of off-the-job training, allow for this extra time. This is in addition to English and maths training if required.
3.2 This planned off-the-job training (day release, where applicable) plus on-the-job training (time at work) should be a minimum of 30 hours (to include time off the job). Apprentices will be paid for all hours worked, including hours off-the-job training at least the minimum Apprenticeship wage as determined by the government Department of Work and Pensions (DWP). If applicable, the Apprenticeship rate (national minimum wage) is not used prior to the apprenticeship start date.

3.3 Confirm that the intention at the start of the Apprenticeship there is available time that you will allow the Apprentice to be able to complete the Apprenticeship within their working hours, including English and maths, if applicable.

3.4 You are expected to allocate an appropriate Supervisor/Mentor, to support, encourage and monitor the Apprentice in the workplace, who in the case of the above Student will be named on Part B: Individual Curriculum Plan.

3.5 The Supervisor/Mentor is required to participate in tripartite progress reviews to discuss progress to date against the Individual Training Plan and the immediate next steps provided. These will be held every 12 weeks either face to face or remotely via an online meeting space.

3.6 Confirm that the Apprentices' job is genuine with an accompanying skills development programme to enable them to gain the technical knowledge, practical experience and wider skills they need for their immediate job and future career through a wide mix of learning in the workplace, formal off-the-job training and the opportunity to practice new skills in a real work environment.

3.7 Ensure the apprentice has a contract of employment for the full period of the Apprenticeship, including EPA and that the apprentice is included in the PAYE scheme declared on the Apprenticeship Service account.

3.8 Provide a job opportunity, where this continues to exist, if the Apprentice wishes to remain with the Employer after successful achievement of the Apprenticeship.

3.9 To provide the experience, facilities and training necessary to achieve the training objectives specified in the Apprentice's training plan without loss of wages. To treat the Apprentice fairly and reasonably as with the rest of the workforce and not discriminate or act unfairly against Apprentices.

3.10 Fund re-sits for mandatory qualifications or End Point Assessments needed for the Apprenticeship where no additional learning is required.

3.11 Fund training, optional modules, educational trips or trips to professional events not specified in the Apprenticeship Framework or to meet the knowledge, skills and behaviours of the Apprenticeship Standard.

3.12 Pay the difference in costs for the end-point assessment (EPA) for the Apprenticeship Standards, where these exceed the 20% of the funding band maximum.

3.13 Holiday entitlements should be a minimum of 20 days per year (but the Apprentice should comply with the Employer's terms and conditions), plus statutory holidays. Reasonable time off, at the discretion of the Employer should be allowed e.g. for compassionate reasons.

3.14 To undertake legal and contractual responsibilities for the health and safety of the Apprentice.

3.15 Equal opportunities – the Employer shall ensure that all Apprentices are treated in the same manner as any other employee by or under the Employment and health, Safety and Welfare Regulations set by the Government, which are subject to change at any time. These requirements are set out in the Employer handbook.

3.16 The Employer must issue their Apprentice with an Apprenticeship Agreement. This can be a written statement of particulars under the Employment Rights Act 1996, a contract of employment or a letter of engagement where the Employer's duty under the 1996 Act is treated as met. An Apprentice is deemed to be employed by the Employer for all purposes of employment law but will remain an Apprentice of UCQ's learning programme. The Employer shall ensure that the Apprentice receives not less than the legal minimum wage and is expected to pay the appropriate wage for that trade or profession.

3.17 The Employer is responsible for paying the Apprentice allowance for holiday entitlement plus statutory holidays. If an Apprentice is off work due to sickness or has been given authorised absence, e.g. compassionate leave, it is recommended that the Employer continues to pay the Apprentice for the period of up to 3 consecutive weeks, or in accordance with the Apprentice's contract of employment.

3.18 It is the responsibility of the Employer to ensure that all persons participating in any form of learning at the discretion of the Employer are covered by policies of Employer and Public Liability Insurance. If so directed, the Employer shall include in their wages declaration to their insurers the total amount of allowance paid to Apprentices and the numbers in learning on their premises or on behalf of the Employer.

3.19 The Employer shall make available for monitoring by UCQ's policies of insurance relating to the operation of the elements of the learning programme provided by themselves, as directed by UCQ or the DfE.

3.20 The Employer is asked on a regular basis to complete an Employer Survey. This is so that UCQ can gauge the level of understanding of the programmes by the Employer and to gauge levels of satisfaction in the service provided.

3.21 Where an Apprentice suffers personal injury or develops a disease as a consequence of their normal working duties, the Employer should immediately notify UCQ.

3.22 In the event of an Apprentice being absent from work, it is recommended that the Employer should report it to UCQ on the first day of absence and again on the first day of return. All absences from UCQ courses will be reported to the Employer. Persistent absences may result in termination of the Apprentice's participation of their learning programme.

3.23 If the Apprenticeship is terminated due to redundancy, UCQ will attempt, with the assistance of the relevant organisations, to arrange employment for the Apprentice, for the duration of the Apprenticeship with another Employer.

3.24 Ensure that recruitment practice is not detrimental either to the Apprentice or the Apprenticeship brand.

3.25 Ensure that all current funding rules, as agreed to in the Employer Training Agreement, are not breached to avoid the recovery of all or part government funding.

4. The Training Provider's Responsibilities

4.1 Agree a plan of the Apprenticeship delivery including financial value that will (for Standards) include EPA costs that will also cover the external quality assurance to ensure consistency of quality.

4.2 Support Employers to negotiate with End Point Assessment Organisations to secure value for money, especially where the 20% expected maximum of the funding band by the DfE is exceeded.

4.3 Provide training and support for the Employer that is value for money, to ensure the Apprenticeship programme can be achieved.

4.4 Ensure the checking of the eligibility of the Apprentice and provide evidence of their eligibility.

4.5 To check that the contents of the training plan fulfil the national and industry/sector agreed criteria for Apprenticeships and to arrange all aspects of the Apprentice's framework/standard are completed accordingly.

4.6 Create an individualised learning record (ILR) and record their learning start date and agreed price for training and assessment.

4.7 Carry out thorough assessments that meet the criteria for those Apprentices requiring learning support.

4.8 Ensure evidence is provided for Employers who are eligible for waivered Employer contribution.

4.9 Ensure Employer Contribution payments are collected, evidenced and recorded on the Apprentice's ILR.

4.10 Ensure there are no delays with the processing of any incentive payments which the Employer is eligible to receive within 30 working days of receiving this funding from DfE.

4.11 Monitor the Quality Assurance of the delivery by the Training Provider through regular meetings, audits and observations of teaching, learning and assessment.

4.12 Be responsible for resolving any issues or disputes between the Employer, Training Provider and Assessment Organisations.

4.13 Ensure that all current funding rules are not breached to ensure Employer's expectations and Apprentices' training represents value for money.

4.14 To maintain regular contact with the Apprentice and carry out regular reviews with the Apprentice and Employer as set out in the training plan.

4.15 To ensure that the training meets the requirements set out in the Contract between the Training Provider and the DfE in particular in relation to Quality Assurance processes including Health & Safety obligations.

4.16 If the Apprentice is unable to complete the Apprenticeship, then the Training Provider shall use its best endeavours to support the Apprentice with opportunities to transfer to another organisation that will be able to provide an Apprenticeship Plan substantially similar to the existing one.

4.17 To support the Employer with the option to use the free Recruit An Apprentice tool available on GOV.UK should this be required for the recruitment of new apprentices.

5. Complaints Procedure

5.1 Stage One: In the event that you are unhappy with the Apprenticeship (including quality), you should raise your concern with your tutor in the first instance. If you are still not happy, please contact UCQ – Kelly Pattison, Head of Data & Quality at kelly.pattison@ucq.ac.uk.

Stage Two: Where your complaint remains unresolved, formal complaints must be submitted in writing to the complaints officer (complaints@ucq.ac.uk) who will:

- Acknowledge receipt of the complaint within one working day
- Forward the complaint to the appropriate member of the Academic Council for investigation
- Monitor that the complaint has been responded to within the timeframes set in the UCQ Complaints Procedure

UCQ will strive to resolve 90% of complaints within 10 working days of receipt and 100% resolved within 20 working days of receipt, unless otherwise agreed with the complainant and contracting authorities.

Stage Three: Should the complainant consider that their formal complaint has not been properly investigated they may escalate to the Principal & CEO to review their complaint. The complainant must submit, in writing, the grounds on which the complaint should be reviewed and the resolution that the complainant seeks. For further information please access the full UCQ Complaints Procedure.

Stage Four: If the complainant remains dissatisfied after exhausting the UCQ internal procedures, students have a right to escalate their complaint for review to the Open University (if it relates to the academic standards and/or quality of the learning opportunity on the BA (Hons) Professional Management degree).

UCQ subscribes to the independent scheme for the review of higher education student complaints. Once you have exhausted all previous stages, if you are dissatisfied with the outcome you may be able to apply for a review of your appeal to the Office of the Independent Adjudicator for Higher Education (OIAHE) providing that the complaint that you take to the OIA is eligible under its Rules. The time limit for bringing a complaint to the OIA is 12 months.

You also have the option to escalate to the DfE Apprenticeship Service Support. See details below for contact details:
helpdesk@manage-apprenticeships.service.gov.uk
Telephone: 0800 0150600
Hours of business: 8am – 10pm, 7 days a week

7. Consent for photography and filming

7.1 I consent to University Centre Quayside (UCQ) using photographs and/or video recordings of me. These images may be used for teaching and assessment purposes, including being used as evidence of assessment during my programme of study.

These images could also be used in print and digital media formats including print publications, websites, e-marketing, posters banners, advertising, film, social media and/or research purposes. I understand that images on websites can be viewed throughout the world and not just in the United Kingdom and that some overseas countries may not provide the same level of protection to the rights of individuals as EU/UK legislation provides.

I understand that some images or recordings may be kept permanently once they are published and be kept as an archive.

7.2 You have the right to request to see a copy of the information we hold about you and to request corrections or deletions of the information that is no longer required. You can ask UCQ to stop using your images at any time, in which case it will not be used in future publications but may continue to appear in publications already in circulation.

You have the right to lodge a complaint against UCQ regarding data protection issues with the Information Commissioner's Office (https://ico.org.uk/concerns/).

If you have any questions relating to photo consent, the way UCQ are planning to use your information or questions relating to data protection, please contact:

Michelle Elliott – Vice Principal
T: 0300 0048 470
E: michelle.elliott@ucq.ac.uk

8. Initial Assessment and Tailored Training Plan

9.1 After completing initial assessment, the provider shares the outcome with the student and their employer so that all parties understand the results and how these results inform this tailored training plan.

9.2 All parties agree:

- an apprenticeship is the most appropriate training programme for the apprentice;
- all relevant prior learning and experience has been identified and properly accounted for in the design of the training plan, which has been adjusted accordingly;
- the training plan aligns with an approved apprenticeship standard at the most appropriate level;
- the apprentice's job role has a productive purpose and that there is a direct link between this job role and the CMDA apprenticeship standard;
- all parties will work together to achieve the apprenticeship in line with the roles and responsibilities of the provider, employer and apprentice highlighted in points 1-4 above;
- the price of the apprenticeship and any required employer contribution was made clear from the outset and is agreed in this document with a full breakdown in Schedule 8 of the Employer Training Agreement;
- the employer will provide the apprentice with the appropriate support and supervision to carry out both their job role and their apprenticeship (including end-point assessment);
- the employer will release the apprentice for off-the-job training (and English and maths training if required), as documented by this training plan;
- the employer will provide the apprentice with the opportunity and support to embed and consolidate the knowledge, skills, and behaviours gained through off-the-job training into the workplace; and
- the employer will take part or provide input into progress reviews.

Confirmation of Funding Sources

Total Negotiated Price for this Apprenticeship	£21,560

Component	Funding source
CMDA Apprenticeship Standard	Funded through the Employer's apprenticeship levy or through co-investment with the Department for Education as outlined in the DfE funding guidelines.
Functional Skills (English and maths) *	Department for Education

* only applies where Functional Skills are required, where the Apprentice does not have at least Level 2 English and Level 2 maths.

Signatures

We hereby confirm that we have read, understood and agree with the contents of the Individual Training Plan. **As the employer I agree to allow the student time in their working hours for the off the job training entitlement.**

As a student, I have read and understand the conditions of photo consent at section 7:

☐ Yes I consent to my images being used as described in section 7
☐ No I do not consent to my images being used as described in section 7

Student Name:			
Signature:		Date:	
Employer Name:		Contact Name:	
Signature:		Date:	
Provider Name:	University Centre Quayside Ltd	Contact Name:	Francesca McDonnell
Signature:		Date:	

An apprenticeship agreement must be in place at the start of the apprenticeship. The purpose of the apprenticeship agreement is to identify:

- the apprenticeship standard connected to the apprenticeship;
- the dates during which the apprenticeship is expected to take place; and
- the amount of off the job training that the apprentice is to receive.

Student name:	
Apprenticeship standard and level:	Chartered Manager Degree Apprenticeship
Employer:	

Start date of apprenticeship:		End date of apprenticeship (including EPA):	
Start date of practical period:		Estimated end date of practical period (Gateway):	
Duration of practical period (in weeks):	156	Planned Off-the-job hours on programme:	960

Signatures

Student Name:			
Signature:		Date:	
Employer Name:		Contact Name:	
Signature:		Date	