

# CIPFA Business Limited

Monitoring visit report

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**Unique reference number:** 1278693

**Name of lead inspector:** Jane Hughes HMI

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**Type of provider:** Independent learning provider

**Address:** 77 Mansell Street  
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## Monitoring visit: main findings

### Context and focus of visit

From October 2018, Ofsted undertook to carry out monitoring visits to all newly directly funded providers of apprenticeship training provision which began to be funded from April 2017 or after by ESFA and/or the apprenticeship levy. This monitoring visit was undertaken as part of those arrangements and as outlined in the 'Further education and skills inspection handbook', especially the sections entitled 'Providers newly directly funded to deliver apprenticeship training provision' and 'Monitoring visits'. The focus of these visits is on the themes set out below.

CIPFA Business Limited (CIPFA) is a professional accountancy body specialising in public finance. Their 14,000 members work throughout the public services, in national audit agencies, in major accountancy firms, and in other bodies which need to manage public money. CIPFA offers a range of professional qualifications in accountancy, as well as a postgraduate diploma for people already working in leadership roles.

In 2017, CIPFA gained a contract to provide levy-funded apprenticeships and started recruiting apprentices in September 2017. Currently, eight apprentices are on professional accounting/taxation technician standards at level 4 and eight are on assistant accountant at level 3. The 207 apprentices on accountancy taxation professional standards at level 7 are not in scope for this monitoring visit. Almost all apprentices are over the age of 18 years.

### Themes

#### **How much progress have leaders made in ensuring that the provider is meeting all the requirements of successful apprenticeship provision?**

#### **Reasonable progress**

Leaders and managers at CIPFA have a clear vision and strategy to meet the business needs of their members and to train apprentices to be successful in their accountancy careers. These relate specifically to improving the management of public finance through education and training. Leaders and managers have high expectations of apprentices and employers and aspire that CIPFA will be an outstanding provider. Leaders have adapted their recognised qualifications in accountancy and taxation to meet the requirements of the apprenticeship standards. They have long-established partnerships with employers, with whom they work very closely to ensure that they adapt the programmes to meet their needs. Employers value this approach and are very aware of how the effective development of apprentices benefits their businesses.

Directors have structured the training team appropriately and recruited well-qualified, work-based learning coaches to support apprentices. For example, coaches have high-level qualifications in accountancy and financial audit, and experience of

teaching and training. Coaches collaborate effectively and observe each other to share best practice and keep up to date. However, no specialist work-based coaches are available to identify and support apprentices who may need additional help.

Leaders and managers monitor apprentices' progress effectively and have a good understanding of how well apprentices perform. They also monitor the performance of staff. Lines of accountability are clear. Leaders hold performance management meetings with coaches frequently. The governing board and students' and members' board meet frequently to discuss the progress and quality of the programme, and to hold leaders and managers to account.

Managers ensure that apprentices receive the required off-the-job training. Apprentices take part in a variety of off-the-job learning activities, such as face-to-face sessions, online group teaching sessions, short bespoke video clips, work shadowing and internal staff training. Managers check frequently that apprentices participate in these activities. Employers commit fully to the requirement.

Managers and staff work effectively with employers to recruit apprentices to the appropriate programme. They provide apprentices with good initial information, advice and guidance about the programme and the progression opportunities after completion. Apprentices are on the correct course at the appropriate level and understand well the career opportunities available to them.

In a few cases, apprentices already have experience of working in public sector finances. Managers have detailed discussions with their employers and the apprentices about the new knowledge, skills and behaviours they need to develop, and enrol them on to the correct level of programme. However, they do not detail the results of this assessment sufficiently in apprentices' individual learning plans to identify the specific areas on which apprentices need to focus.

Most apprentices have good skills in English and mathematics. Leaders and managers have made suitable arrangements for the small minority of apprentices, who need to gain functional skills qualifications to achieve their apprenticeship programme.

Coaches work closely with apprentices to develop their use of English. They help them to write to the required standard for their examinations. They also support them in the preparation of written reports for their managers at work. Apprentices improve their mental arithmetic and application of algebra as a result of their learning and work.

**What progress have leaders and managers made in ensuring that apprentices benefit from high-quality training that leads to positive outcomes for apprentices? Reasonable progress**

The majority of apprentices who start their apprenticeship remain on the programme and make good progress. A few apprentices have started the work for their end-

point assessment (EPA) earlier than expected. Apprentices develop new knowledge, skills and behaviours which enable them to be effective employees. For example, apprentices develop the techniques to keep accurate financial journals and how to understand financial audit in relation to the public and the private sectors. Apprentices make clear links between the lessons they have in their off-the-job training and the activities they carry out at work.

Apprentices are highly motivated. They enjoy their learning and development and aspire to move on to the next level of qualification on completion of their programme. Apprentices particularly like the short bespoke video clips their coaches send them to support them to complete challenging questions.

Apprentices gain a good understanding of the professional behaviours expected of them at work and they apply these behaviours effectively. Through the well-designed workbooks, apprentices see how they have improved specific behaviours, such as their analytical skills and decision making. Coaches give apprentices helpful feedback on how to relate these skills to their company targets, such as to increase revenue.

Apprentices have very frequent contact with their coaches, who set realistic short-term targets and give them clear information on the progress that they make. Coaches give apprentices effective one-to-one support when they fall behind or fail unit examinations. For example, in a revision session on business taxation, apprentices improve their knowledge of how to prepare end-of-year accounts. As a result, the majority of apprentices who fail at their first attempt, pass on the second. Coaches do not always check sufficiently that apprentices are ready to take their examinations and enter them too early.

Coaches prepare apprentices well for their EPA. They give apprentices set tasks, mock examinations and useful information on how to improve their personal statements. However, not all apprentices know it is possible to achieve high grades in their EPA, or how they might achieve them.

Leaders and managers carry out a range of activities to evaluate the quality of their training. They use the feedback from apprentices effectively to adjust the programme. Leaders and managers have a good understanding of their strengths and areas for improvement. However, managers' observations of learning sessions do not focus sufficiently on the impact of learning for apprentices. As result, managers do not identify when coaches facilitating the online classroom sessions fail to check apprentices' understanding.

**How much progress have leaders and managers made in ensuring that effective safeguarding arrangements are in place? Reasonable progress**

Leaders and managers have appropriate safeguarding policies and procedures. Managers and staff supporting the apprenticeship programme have a good

knowledge of their responsibilities and duties and how to identify and report any concerns that they have.

The designated safeguarding officer (DSO) and the deputy designated safeguarding officer have completed recent and relevant training at the correct level. They have implemented suitable reporting procedures. They know the relevant local authorities with whom they should engage. The effectiveness of these procedures is untested, because no safeguarding incidents have occurred. The DSO maintains a risk register of potential safeguarding issues and vulnerable adults. The DSO monitors this closely to ensure that apprentices receive sufficient help to enable them to continue with their apprenticeship programme.

Before appointing staff, managers make sure they are suitable to work with apprentices. The vast majority of staff have received relevant 'Prevent' duty training and training on how to safeguard apprentices. The recently produced 'Prevent' duty action plan outlines key operational tasks for full implementation by February 2019. These include developing training resources for staff and apprentices, better signposting of apprentices to the designated safeguarding officer and monitoring apprentices' online activities.

Apprentices feel safe at work and on their training days. They have a good understanding of whom to speak to if they have any concerns. Apprentices receive safeguarding information at the start of their programme, but they do not receive further ongoing updates.

While staff provide apprentices with information about the dangers of radicalisation and extremism and specific potential risks in their community, this is not always sufficiently comprehensive. As a result, despite learners having some knowledge of these issues, their understanding of their relevance to their workplace or personal lives requires further development. Leaders realise that they have been too slow to provide this information to apprentices and have recently introduced new plans to improve this.

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