

# Inspection of Kaplan Financial Limited

Inspection dates: 8 to 11 October 2024

<b>Overall effectiveness</b>	<b>Good</b>
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The quality of education	<b>Good</b>
Behaviour and attitudes	<b>Good</b>
Personal development	<b>Outstanding</b>
Leadership and management	<b>Good</b>
Apprenticeships	<b>Good</b>
Overall effectiveness at previous inspection	Requires improvement

## Information about this provider

Kaplan Financial Limited (Kaplan) provides a wide range of courses in the financial services and accounting sectors. The apprenticeship provision operates across multiple sites nationally. At the time of the visit, 8090 apprentices were enrolled. Nearly all of these were aged 19 or over. Three quarters of all apprentices study the level 7 accountancy or taxation professional apprenticeship. The remaining apprentices were enrolled in apprenticeships in the professional and business services sector or the financial services sector from levels 2 to 6.

## **What is it like to be a learner with this provider?**

Apprentices who attend in-person training are enthusiastic and enjoy a calm and comfortable learning environment. They have opportunities to develop valuable networking skills and relax between sessions. Apprentices value their learning experience and have positive relationships with their tutors. Attendance to in-person training is high. However, too many apprentices do not attend the live online sessions. Therefore, they miss valuable learning opportunities.

Apprentices demonstrate an excellent understanding of their sectors' expectations and professional values. They have a robust understanding of fundamental British values and how these apply to the workplace. They adhere to their employers' and professional bodies' codes of conduct by embodying professional behaviours, respect, integrity, ethics, and confidentiality. Apprentices develop relevant professional behaviours and become credible and competent professionals.

Apprentices have access to additional learning experiences that develop their broader skills successfully. They participate in charity events and volunteer to give presentations at career sessions to prospective apprentices. They act as mentors and provide helpful advice to less experienced apprentices. Accounting apprentices enter skills competitions, and a few are successful. Because of these experiences, apprentices develop confidence in their abilities to succeed.

Apprentices have a solid understanding of healthy relationships. They recognise the appropriate professional and personal behaviours that they should expect from their colleagues. Younger apprentices learn about consent. They know the signs of abuse and who to go to should they need support. On the rare occasions that apprentices may witness inappropriate behaviour, they are confident that staff will deal with it effectively. As a result, apprentices say they feel safe.

## **What does the provider do well and what does it need to do better?**

Leaders have a clear and ambitious vision to develop highly skilled apprentices. Apprentices and employers value the knowledge and skills apprentices learn. They recognise how this helps them to prepare for work and contribute to their organisations. Leaders in digital learning work closely with industry specialists, such as the British Computer Society, to design the level 3 digital apprenticeship. In the accounting curriculums, leaders provide a comprehensive apprenticeship that teaches apprentices the knowledge and skills essential to becoming successful accountants.

Leaders have planned logically ordered curriculums that help apprentices build on their learning successfully. Apprentices studying level 4 professional accountant or taxation technician apprenticeships initially learn skills and behaviours such as 'setting you up for success' before they commence technical learning. Apprentices studying level 3 assistant accountant undertake a curriculum that initially teaches

them basic knowledge, such as double entry, before moving on to accrual, inventories, debt and suspense accounts.

Talent coaches accurately identify apprentices' starting points and use these effectively to inform their teaching. Apprentices undertake various assessments at the start of their apprenticeship. Talent coaches use the results of these to adapt the order in which apprentices learn. For example, apprentices studying level 7 accountancy or taxation professional who demonstrate secure knowledge of management information sit that exam first. Therefore, apprentices do not repeat learning and spend more time developing the knowledge and skills in less familiar topics.

Too many apprentices have been negatively impacted by the changes in talent coaches. Numerous apprentices have undergone several changes to their talent coaches throughout their apprenticeship. These changes have created frustration, and apprentices have lost motivation because they have to re-submit work. This additional work has resulted in many apprentices continuing beyond their end date. Leaders have reduced the caseloads of talent coaches and provided additional training to ensure apprentices receive a consistent experience. However, it is too early to see the impact of these actions.

Tutors use teaching strategies effectively in well-organised sessions to help apprentices learn substantial new knowledge and skills. Tutors use quizzes at the start of the session to recap prior learning. They present information clearly, enabling apprentices to grasp new concepts quickly. Tutors coach apprentices through complex workings so that they understand and can apply the different steps in financial processes. They frequently facilitate group discussions so apprentices can apply their learning and obtain valuable examples and experiences from their peers. Most apprentices pass their examinations on their first attempt.

Most tutors use a range of assessments to consolidate learning, identify gaps in knowledge and correct misconceptions successfully. Tutors use in-class assessments to consolidate and extend apprentices' knowledge. In live online lessons, tutors use online polls and direct and indirect questioning effectively. When apprentices have not made the correct assumptions, tutors provide further explanations. This ensures that apprentices better understand critical concepts and deepen their knowledge.

Talent coaches support apprentices in planning their next steps successfully. Apprentices benefit from helpful initial advice and guidance to ensure that they study the correct apprenticeship that meets their current and future career aspirations. They have access to extensive careers advice and guidance resources tailored to their apprenticeship. Employers provide apprentices with highly structured careers guidance and exposure to different career pathways within their organisations. Consequently, apprentices can make informed decisions about their next steps.

Leaders have a good understanding of the strengths and weaknesses of their apprenticeships. They have implemented suitable strategies to improve the quality

of education for apprentices. Leaders have started reducing the number of apprentices who leave during their apprenticeship, which has resulted in an overall increase in outcomes. However, more work needs to be done to ensure that apprentices are supported to reach their potential.

Leaders manage subcontractors effectively. They have clear processes to support subcontractors and ensure that apprentices receive high-quality learning. Leaders conduct observations of teaching and learning. Subcontractor staff communicate frequently with leaders to resolve any issues rapidly. As a result, apprentices achieve the technical qualifications they need to be successful.

Leaders have established an effective external advisory board. Members are highly skilled and experienced education professionals who provide extensive challenge, insight and direction to the leadership team. Leaders provide advisory board members with comprehensive information that allows them to understand the provider's strengths and identify areas for improvement. Board members participate in lesson observations and provide helpful feedback to leaders. As a result, they have provided leaders with the necessary support and challenge to improve the quality of education apprentices receive.

## **Safeguarding**

The arrangements for safeguarding are effective.

### **What does the provider need to do to improve?**

- Reduce the number of times apprentices change their talent coaches during their apprenticeship.
- Increase apprentices' attendance to live online learning sessions.
- Continue to increase the number of apprentices who achieve their apprenticeship successfully.
- Reduce the number of apprentices who have gone past their end date.

## Provider details

<b>Unique reference number</b>	54838
<b>Address</b>	Baskerville House 2 Centenary Square Birmingham B1 2ND
<b>Contact number</b>	07983586644
<b>Website</b>	<a href="https://kaplan.co.uk/">https://kaplan.co.uk/</a>
<b>Principal, CEO or equivalent</b>	Kathy Walton
<b>Provider type</b>	Independent learning provider
<b>Date of previous inspection</b>	14–17 June 2022
<b>Main subcontractors</b>	Chartered Institute of Credit Management London Institute of Banking and Finance Chartered Institute of Internal Auditors Tolley

## Information about this inspection

The inspection team was assisted by the chief operating officer, as nominee. Inspectors took account of the provider's most recent self-assessment report and development plans, and the previous inspection report. The inspection was carried out using the [further education and skills inspection handbook](#) and took into account all relevant provision at the provider. Inspectors collected a wide range of evidence to inform judgements including visiting learning sessions, scrutinising learners' work, seeking the views of learners, staff and other stakeholders, and examining the provider's documentation and records.

### Inspection team

Bev Ramsell, lead inspector	His Majesty's Inspector
Helen Morgan	His Majesty's Inspector
Helen Kinghorn	Ofsted Inspector
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Gareth Luke	Ofsted Inspector
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Beth Selwood	Ofsted Inspector

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