



TRAINING STANDARDS COUNCIL

INSPECTION REPORT SEPTEMBER 1999

REINSPECTION DECEMBER 2000

**Taurus Training Limited**

## SUMMARY

Taurus Training Limited works with a large number of employers mainly in the Liverpool and Manchester areas. Most trainees are recruited directly by employers, who provide good work experience and learning opportunities. Training staff are committed to ensuring that trainees succeed and they visit them frequently in the workplace. Retention rates are high in most areas and the involvement of minority ethnic and disadvantaged groups is good. Some opportunities to gather evidence from the workplace are missed and the integration of key skills with programmes is slow. At the first inspection, training in leisure, sport and travel was poor, with missed learning and assessment opportunities and insufficient resources. The reinspection shows that training in leisure, sport and travel has improved, with objectives clearly understood by staff who are developing good learning support for trainees and good work placements. However, key skills are not given sufficient attention and there is some poor assessment practice. The management style empowers staff to deal with situations as they arise. Staff meet regularly to discuss progress and areas of concern but the use of data to guide management decisions is underdeveloped.

**As a result of the reinspection of Taurus Training Limited, the original published report text for leisure, sport and travel has been replaced by new text which makes reference to the original inspection findings. This summary page, the overall report introduction and the inspection findings introduction have also been amended to reflect the outcomes of reinspection. All other sections of the original published report, which have not been subject to full reinspection, have been left in their original form.**

### GRADES

OCCUPATIONAL AREAS	GRADE
Manufacturing	2
Business administration	3
Retailing & customer service	2
Leisure, sport & travel	4
Hospitality	3
Health, care & public services	3

GENERIC AREAS	GRADE
Equal opportunities	2
Trainee support	2
Management of training	2
Quality assurance	3

REINSPECTION	GRADE
Leisure, sport & travel	3

### KEY STRENGTHS

- ◆ good work environments
- ◆ trainees committed to progression



- ◆ effective and frequent assessors' visits
- ◆ high retention rates in most areas
- ◆ good links with disadvantaged groups
- ◆ open management style empowers staff

#### **KEY WEAKNESSES**

- ◆ underdeveloped assessment and integration of key skills
- ◆ underdeveloped learning resources in some areas
- ◆ missed opportunities for evidence-gathering in some areas
- ◆ poor use of data to inform decisions

## INTRODUCTION

1. Taurus Training Limited (Taurus Training) was established in Liverpool during 1995, to provide training for work-based programmes through Merseyside Training and Enterprise Council (TEC). A youth training contract was obtained in 1996 with all off-the-job training subcontracted to training providers approved by the TEC. During 1986 to 1999, the company became one of Liverpool's largest training providers. Since the first inspection, the number of trainees has increased by 29 per cent. There are 527 advanced modern apprentices, 402 foundation modern apprentices and 157 other work-based trainees. The company provides 10 per cent of all work-based training contracted by Merseyside TEC and is the largest provider of leisure, sport and travel training in the area. The company is less involved with the New Deal, with no new referrals during the current contractual year. The five existing clients on the subsidised employment option are due to complete their planned activity early in January 2001. There are trainees in nine of the 14 occupational areas in which the TEC funds training, with the largest numbers in double glazing manufacturing, business administration, retailing and customer service, leisure, sport and travel, hospitality and care for the elderly. Because of the small numbers of trainees, engineering, management and hair and beauty were not inspected. Some business administration and retailing and customer service trainees have been taken over from two training providers who ceased trading. Their work placements are as far afield as Leeds, Coventry, Slough and Essex. The company operates the Merseyside 'Include' scheme for excluded school pupils from years 10 and 11 in partnership with the local education authority.

2. Since the first inspection, the company's Liverpool office and training facilities have been relocated from the city centre to self-contained premises on the Sefton border. The smaller operation in Manchester continues to be run from offices on the edge of the city centre. There are currently 221 trainees who are funded through a contract with Manchester TEC. The company has expanded its employer-base and works with 254 employers in Merseyside and 79 in Manchester. Merseyside TEC was the co-ordinating TEC for the first inspection and the sole contracting partner at reinspection. Overall staffing levels have increased from 26 to 44 full-time members of staff, although the number of self-employed associate staff has decreased from 17 to 12. The company's mission statement states that it is committed to the training and development of young people, the unemployed and the disadvantaged so that they may achieve meaningful qualifications and productive careers.

3. At the time of the first inspection, the proportion of unemployed people in the Merseyside area was high, at 9.8 per cent, while in Greater Manchester the proportion was much lower, at 5.2 per cent, compared with an average of 5.7 per cent for the northwest region and 4.1 per cent nationally. In the northwest region, 8.6 per cent of unemployed claimants were men and 2.5 per cent were women. Minority ethnic groups in Greater Manchester accounted for 4.6 per cent of the



population, while in Merseyside the proportion was nearly 6 per cent. By the time of reinspection, in September 1999, the unemployment rate in Merseyside had decreased to 7.6 per cent, still above the average for the northwest region of 4.2 per cent and the national average of 3.5 per cent.

4. In 1998, the proportion of school leavers achieving five or more general certificates of secondary education (GCSEs) at grade C and above was 31 per cent, compared with the national average of 46.3 per cent. In the Sefton local authority area achievement was much nearer the national average of 44.4 per cent. The most recent statistics show that the proportions have increased to 35.5 per cent in Merseyside and 48.4 per cent in Sefton, compared with the national average of 49.2 per cent.

## INSPECTION FINDINGS

5. The self-assessment report was developed by senior management following discussion and review by all staff. The report contained a helpful introductory section and achievement data were provided to inspectors during the inspection. Most judgements were realistic, although some aspects identified as strengths were no more than normal practice. The report did not follow the headings and quality statements of *Raising the Standard*. Statements were cross-referenced to evidence sources. An action plan was included with the report but this did not include target dates. Following the first inspection, the company analysed common themes identified by inspectors and prepared an action plan which fully addressed reported strengths and weaknesses. Through monthly team meetings the staff within the leisure, sport and recreation team developed strategies to rectify weaknesses in their occupational area. They contributed to the production of a short report in preparation for the reinspection for leisure, sport and travel, which provides a summary of action taken, outlines progress made and indicates evidence sources to support their claims. The report does not include current strengths and weaknesses. At the reinspection, inspectors awarded the same grade as that given by the company.

6. A team of 12 inspectors spent a total of 60 days at Taurus Training during September 1999. Inspectors visited and interviewed 151 trainees in the workplace and interviewed two by telephone. They observed 116 trainees in a range of training sessions. Training staff accompanied inspectors to 73 employers' premises where 46 supervisory staff were interviewed. A total of 22 assessments and 25 learning sessions were observed. Most of Taurus Training's staff were interviewed during the inspection. Inspectors examined management documents, individual trainee's files, portfolios, data on progression and external verifiers' and audit reports.

7. The reinspection was carried out by a team of two inspectors who spent six days at Taurus Training during December 2000. They met 23 trainees and interviewed training staff and managers. Inspectors observed four training sessions and awarded one a grade 2 and the remainder a grade 3. During five visits to work placements they held discussions with two supervisors and observed four assessments. Inspectors examined personal development plans and trainees' portfolios, guidance materials and tutor packs. They examined meeting notes and action plans, records of programme reviews, internal verification documents, external verifiers' reports and management files.

## OCCUPATIONAL AREAS

### Manufacturing

### Grade 2

8. A total of 82 male trainees are working towards NVQs at levels 2 and 3. The programme started in the Merseyside area during 1997, and in Manchester, recruitment started early in 1999. NVQ level 2 options undertaken are production of glass supporting fabrication; glass processing; installation of glass supporting structures; automotive glazing and glazing. At NVQ level 3, two options are being undertaken: glass manufacturing processes and production operations and glass processing. Forty trainees are modern apprentices, 24 are national trainees, nine are on other training and nine are New Deal clients. The provider is represented on the national working party for the modern apprenticeship framework and on the qualifications and curriculum authority's (QCA) review steering group for this vocational area. The assessment team comprises the vocational co-ordinator and a well-qualified full-time member of staff. All trainees are employed in companies who specialise in either flat glass coatings or the manufacture of double glazing units. All assessment is undertaken on-the-job. Assessors' visits to trainees take place every two weeks with formal reviews carried out quarterly. Inspectors agreed with most of the strengths and weaknesses recognised in the self-assessment report and identified other strengths. They awarded a higher grade than that given in the self-assessment report.

#### **GOOD PRACTICE**

*A New Deal client was placed with a provider who failed to carry out adequate training and allowed a hazardous environment to exist. The assessor visited to carry out induction only to find the trainee alone, unsupervised and expecting the assessor to carry out training. Taurus Training identified an employer willing to accept the trainee and offer an acceptable level of training. The trainee moved employment and is now halfway to completing his NVQ award.*

#### **STRENGTHS**

- ◆ clear guidance for unit option choices
- ◆ good work-based assessment opportunities, fully utilised
- ◆ wide variety of work-based evidence in portfolios
- ◆ assessors' visits frequent, flexible and effective
- ◆ enthusiastic trainees with clear understanding of progression opportunities
- ◆ high retention rate

#### **WEAKNESSES**

- ◆ no systematic formal planning of some work-based training
- ◆ underdeveloped computing facilities for key skills achievement
- ◆ tracking of trainees' progress lacks formality

9. Following recruitment by their employer, most trainees are promptly introduced to Taurus Training. Once signed onto an appropriate programme, Taurus Training's assessor carries out a well-planned individual induction into the NVQ system. In agreement with the employer and trainee, the most appropriate optional units are selected to suit the work environment. Good use is made of naturally occurring evidence through observation and recording of performance. Well-developed portfolios are enhanced by a good variety of witness testimonies,

worksheets, brochures, photographs, written questions and notes of question and answer sessions. Trainees take additional, certificated, short courses and these contribute to their portfolios. Assessors have many years' recent industrial experience in the production of glass, the manufacture of glass supporting fabrications and the installation of such units. The awarding body licenses them to undertake assessments. Assessors visit every trainee at fortnightly intervals, leaving question sheets to be completed between visits and arranging for observations to be carried out at the next visit. A substantial period of time is spent with each trainee to ensure that they have a clear understanding of requirements and that action plans are shared with employers. There is considerable flexibility in the timing of assessors' visits, ensuring that trainees' needs and availability are met. Examples of this include the assessor joining a night shift, arranging to work with trainees in their homes, weekend working and providing trainees with contact telephone numbers. The dedication, energy and enthusiasm of training staff have a motivating effect on the trainees, who are determined to succeed. Trainees have a clear understanding of the progression routes from NVQ level 2 to level 3, and some are indicating an interest in developing their supervisory skills to become work-based assessors. Over the last two years, 121 trainees have started on the programme and 27 have already achieved an NVQ level 2 award. Retention rates are good with 90 per cent of those who started remaining on programme.

10. In some of the larger companies each trainee has a structured training plan, but in others, production needs take priority over training. The regular use of contact sheets to identify gaps in training is helping employers to fulfil the actions agreed on to maintain trainees' progress towards the award. Trainees at NVQ level 3 understand the requirement of key skills but do not always have access to computing facilities. Some employers are offering trainees the use of their office facilities, at weekends to remedy the situation. Trainees are aware of the NVQ units they have completed but are not so sure of what is outstanding. They rely heavily on their assessor who matches portfolio evidence to the standards at every visit. A tracking matrix is now part of the newly developed standards but is not yet in use by all trainees.

### **Business administration**

### **Grade 3**

11. Taurus Training offers NVQ qualifications at levels 1 to 4 in business administration, information technology and accounting. In administration, there are 62 modern apprentices, six national trainees, 11 on other youth programmes and three clients on New Deal. In information technology, there are 12 modern apprentices. Seven modern apprentices in accounts are working towards NVQ level 3 through a subcontract with another provider, which was inspected in June 1999. Employers undertake their own recruitment and all trainees are in employment. Employers' businesses are diverse and include companies supplying industrial cleaners and agencies for security guards for the offices of accountants and solicitors in city centres. Some trainees have been employed for a number of years before being placed on modern apprenticeships. Assessors employed by Taurus Training undertake training and assessment in the workplace. Most of the



strengths identified in the self-assessment report were normal practices and some belonged to the generic areas. Inspectors identified further strengths and weaknesses and awarded the same grade as the company.

#### *STRENGTHS*

- ◆ wide range of on-the-job learning opportunities
- ◆ rigorous monitoring of trainees' progress and achievement
- ◆ frequent and effective on-the-job observation and assessment

#### *WEAKNESSES*

- ◆ missed opportunities for collection of evidence of key skills
- ◆ some employers unaware of full training programme requirements
- ◆ some trainees' progress slowed by placement on inappropriate NVQ level

12. Trainees are based in a wide range of industrial and commercial organisations, which offer a rich variety of learning and assessment opportunities. Most companies offer modern computer facilities for trainees to use. Assessors usually visit trainees at fortnightly intervals and their assessment observations are frequent and rigorous. Visits to trainees are productive and incorporate reviews of the progress they have made against the action plan, including reference to how they have progressed against the range statements. Trainees are well motivated and collect a good range of evidence in preparation for assessment. Assessors hold extremely thorough induction sessions and carefully explain the requirements of the NVQ award. A comprehensive introduction to assignment-based evidence as a form of checking knowledge and understanding is carried out and clearly understood by trainees. Observation of trainees in the workplace is thoroughly carried out followed by a detailed question and answer session to check trainees' knowledge of the activity they have just undertaken. Full feedback is provided in a positive manner before detailed documentation is completed. Trainees express confidence in their understanding of evidence requirements and the targets agreed on with the assessor for the next visit. Employers value the support given to their employees by Taurus' assessors. A copy of the contact sheet filled in by trainee and assessor is shared with employers at the end of each visit. Trainees are glowing in their praise of the support given to them by their assessors who visit the workplace at least every fortnight. Training for New Deal clients is very effective; of past clients, three are employed and three have progressed to either a national traineeship or modern apprenticeship. Two of the current trainees have a promise of a job on satisfactory completion of their training.

13. Key skills are not assessed as an integral part of the vocational programme. Little assessment of key skills is undertaken until after the completion of NVQ level 2, even for those trainees on modern apprenticeships and national traineeships. Five trainees were introduced to an NVQ level 2, health and safety

assignment and, although it included direct reference to measuring the cubic capacity surrounding each person's workspace, this was not used as an example of how key skills evidence could be collected. Some trainees and employers are unaware of the requirements of the training programmes. Modern apprentices who pursue an NVQ level 2 qualification as a milestone towards level 3, are not aware from the outset of the progress they are making, and are not seizing opportunities to volunteer for tasks which could give them credit and count towards their award. Some young adult trainees, who have had many years of experience in an office environment before starting the NVQ, are not being accredited for their previous experience. For example, one trainee had five years' office experience, another had a GNVQ advanced in information technology and another was a graduate; all started their modern apprenticeships at NVQ level 2, when level 3 would have been more appropriate for their experience. Progress is slower than necessary for such trainees.

## Retailing & customer service

## Grade 2

### GOOD PRACTICE

*This example shows the level of help and support given to trainees. An assessor held a portfolio-building session with a modern apprentice working in a small family business after the office had closed for the day. The trainer successfully encouraged the trainee to see how evidence for his portfolio was around him at work. Questions to test underpinning knowledge were accurately related to the NVQ element and to the trainee's role in the company. The trainee was able to complete his evidence gathering and meet the target date set in his training plan.*

14. A total of 184 trainees are working towards NVQ levels 2 and 3 with 102 specialising in retailing, 79 in customer service and three in warehousing. There are 111 modern apprentices, 53 national trainees, one New Deal client and 19 trainees on other programmes. All trainees are in employment, working in a wide range of outlets including bakeries, chemists, department stores, shoe shops, fast-food outlets and a nursery. Additional qualifications are offered to all trainees. Customer service modern apprentices employed in fast-food outlets are also working towards NVQ level 2 occupational qualifications. Nine trainees based in a nursery have previously completed childcare NVQs prior to progressing towards a national traineeship in customer service. Other additional qualifications offered include basic health and safety and food hygiene. Most of the trainees are working in the Liverpool area. Since 1997, 218 trainees have started and, of these, 13 per cent have left early and not completed a qualification. Thirty trainees have achieved NVQ level 2 and seven trainees an NVQ at level 3. The self-assessment report identified a balance of strengths and weaknesses. Inspectors identified additional strengths and awarded a higher grade than the provider.

### STRENGTHS

- ◆ high level of occupational competence among trainees
- ◆ good portfolios
- ◆ effectiveness of trainees in improving employers' business performance
- ◆ staff qualifications and experience continually updated and improved
- ◆ effective feedback given to trainees and employers
- ◆ assessors' visits to the workplace frequent, effective and flexible

### WEAKNESSES

- ◆ level and type of NVQ programme not always appropriate for trainees
- ◆ key skills not yet fully integrated
- ◆ underdeveloped internal verification processes

#### **GOOD PRACTICE**

*Trainees are encouraged to look at all issues that relate to the business and this has often increased sales. A trainee noticed that a product in glass bottles was stacked on the bottom shelf of a display unit and could have been kicked by customers. By moving the bottles to a higher shelf not only was the safety aspect improved but also customers were more aware of the product and sales increased noticeably. The lower space was used for general storage.*

15. Trainees are working for companies which provide a good range of occupationally relevant opportunities and a significant number have colleagues or managers who, themselves, have recently undergone vocational training. Employers and supervisors value vocational competence and this provides a positive training environment. Many trainees have achieved promotion or taken on extra responsibilities since starting their programme. A diverse range of good evidence is used to build good-quality portfolios. As well as gathering evidence from their normal work, trainees are given additional material and question sheets by their assessors, which helps to develop underpinning knowledge. Individual tutorial sessions are well used to discuss trainees' responses with particular attention being paid to incorrect answers or that which the trainee is unsure about. A comprehensive four-part assignment in the form of a mini-project covers a wide range of activities related to the unit and is used to consolidate learning. Assessments are very thorough and are completed by using evidence from the set tasks as well as observation of work and witness statements. At NVQ level 3, units are covered in a similar manner but tasks are appropriately more difficult and diverse to suit the higher level. Assessors' visits to trainees are usually fortnightly, but this is flexible and dependent upon need and availability. Additional visits are made when required and include evening and weekend meetings to suit trainees' availability. Detailed and effective feedback is given to both trainee and employer and is used to plan training and set targets for future tasks. Any additional training needs are requested on a specially designed contact sheet and most employers quickly ensure that full coverage and experience is made available to the trainee. Many employers provide good examples of how individual and business performance has improved since the trainees commenced vocational training. Most examples were supported by increased sales attributed to the trainees' improved awareness of business issues and, in particular, by improvements in attitudes towards customers. Retailing and customer service training staff are well qualified in their vocational specialisms with many years of practical experience over a wide range of companies. Most are engaged on a self-employed basis and benefit from a good staff development programme. Many update their knowledge by undertaking work experience in retail outlets.

16. A few trainees are working towards achieving an NVQ level 3 in retailing when an NVQ level 3 in customer service would be more appropriate to their job role. A small number of trainees have significant supervisory or management experience before starting the programme yet they have started at level 2 and have not been accelerated to achieve the award before progressing to level 3. Key skills have not yet been fully integrated with the training programmes and the work done during level 2 is not used as evidence. This situation is being addressed as training staff undergo their own key skills training. A pilot scheme for the integration of

key skills has been undertaken with trainees in customer service who are working in a children's nursery and this is to be extended to trainees in fast-food outlets and other occupational areas in the sector. The number of trainees has increased considerably in recent months owing to another training provider going out of business and Taurus taking over their trainees. This has increased the workload of the assessors. Internal verification processes do not routinely include observation of assessors undertaking assessments.

### **Leisure, sport & travel**

### **Grade 3**

17. There are 161 trainees following sport and recreation programmes, of whom 58 are on a programme for disadvantaged young people which enables them to achieve an NVQ at level 1 in 16 to 20 weeks. Since the first inspection, the company has expanded its programmes and now has 95 foundation modern apprentices working towards NVQs at level 2 in operational services, coaching, teaching and instructing and customer service. There are eight advanced modern apprentices working towards NVQs at level 3 in operations and development and coaching, teaching and instructing. Trainees following the level 1 programme attend Taurus Training's premises to gain occupational knowledge, undertake basic skills training and additional courses in health and safety and first aid. They also spend time at leisure centres in the city. Foundation modern apprentices who have work placements attend Taurus one day a week for portfolio-building and training sessions in theory. Employed trainees receive individual training in the workplace, which is supplemented by open learning materials. Trainees' progression and achievement rates have steadily improved since the first inspection with 86 per cent of the 251 trainees who started on the positive action programme during the contractual year 1999-2000 achieving basic skills awards. Seventy-seven per cent achieved an NVQ at level 1, fulfilling the targets in their individual training plan, and a third achieved other qualifications, for example, lifeguard awards and basic health and safety certificates. During the current year, 46 per cent of trainees have completed their individual training plans, of whom 12 per cent have converted to foundation modern apprenticeship programmes. Seven foundation modern apprentices who started training in the current contractual year have already gained an NVQ at level 2. All advanced modern apprentices are still on the programme.

At the first inspection, the main weaknesses identified were:

- ◆ failure to make best use of assessment and learning opportunities
- ◆ failure to record sufficient evidence of trainees' knowledge
- ◆ lack of a common approach to training
- ◆ underdeveloped resources for supporting learning

18. Since the first inspection, three new staff members have joined the positive action team, including a co-ordinator with overall responsibility for the

programme. A separate team of three staff, led by a programme co-ordinator, has been employed to take responsibility for the foundation and advanced modern apprenticeship programmes. All staff involved in assessments have achieved NVQ assessors' qualifications and are working towards internal verifiers', training and development and key skills awards. Tutor support packs containing schemes of work and session plans have been developed for sessions on theoretical issues. The internal verification of units of the NVQ at level 1 planned and includes observation of assessment, portfolio sampling, regular team meetings and observation of training. Resources, including books and videos, have been purchased. Trainees' support packs have been updated and new training materials and open learning resources have been developed. A new base room has been made available for training sessions for the NVQ at level 1 and separate premises are used for off-the-job training by modern apprentices. Both sites have good information-technology resources. All the weaknesses identified at the first inspection have now been rectified. Inspectors agreed with the grade given in the self-assessment report for the occupational sector.

#### *STRENGTHS*

- ◆ extensive staff occupational expertise and experience
- ◆ good learning and pastoral support for trainees
- ◆ careful matching of trainees to good-quality work placements

#### *WEAKNESSES*

- ◆ poor awareness of key skills among trainees and employers
- ◆ some poor assessment practice

19. Staff are carefully selected for their extensive practical experience in sport and recreation and their abilities to deal effectively with young recruits. The positive action team has expertise in a wide range of sports including football, swimming, aerobics, step, circuit training, tennis, basketball and weight training. The staffing ratio of one to six trainees is good. Staff involved with modern apprentices have wide experience of sport and recreation NVQs. All staff are totally dedicated to their work and show empathy and understanding of trainees' needs. Trainees value the support which they receive from tutors for both learning and personal problems. Help is routinely provided with numeracy and literacy and many trainees achieve basic skills qualifications. Most trainees are interested in sport, but until joining the positive action programme, had not thought of a career in the industry. Trainees gain additional qualifications, including first aid and basic food hygiene, national coaching awards and a swimming pool lifeguard award which the company funds. These improve trainees' prospects of employment. Staff work hard to ensure that trainees have access to training which motivates them. For example, one female trainee was interested in rugby and so a practical session and a visit to a rugby club were arranged for her.

20. Trainees who are interested in working in the leisure industry are encouraged to progress to foundation modern apprenticeships. Staff work well together when arranging work placements to identify the best match for trainees and employers. The company has access to a wide range of good work placements, including health clubs in five star hotels, national private health club chains and local authority facilities. Work placements with accommodation are available further afield for trainees who are prepared to leave Merseyside. Trainees understand that by going on work placements they have the opportunity to impress employers. Over 60 trainees have converted their work placements into permanent employment during the past year. Some workplace supervisors have done NVQs themselves and help trainees with evidence gathering and portfolio-building.

21. Key skills have not yet been integrated into foundation modern apprenticeship programmes and trainees and employers have little understanding of their relevance and importance. Key skills are recorded on individual training plans, but trainees do not have copies of the units and are not set challenging or individualised target dates for completion. A key skills learning pack has been developed, but it does not use examples relevant to the sport and recreation sector. Spelling, punctuation and grammatical errors in foundation modern apprentices' written work are not always corrected. Although NVQs at level 2 are new, internal verifiers have not yet carried out observation of training or assessments and standardisation meetings have not yet been held.

### **Hospitality**

### **Grade 3**

22. There are 87 modern apprentices, 61 national trainees, 34 work-based trainees on other training and nine New Deal clients following NVQ level 2 and 3 awards. Trainees are employed in a wide range of hospitality locations with over 90 employers providing training. Trainee numbers have increased significantly over the last three years and early leaver rates have fallen from 20 per cent in 1996 to 14 per cent in the last year. Four specialist self-employed associates support the vocational co-ordinator. Internal verification is undertaken between members of the training team. Taurus' staff track trainees who leave for other workplaces or help by arranging alternative employment. Inspectors agreed with the strengths and weaknesses identified in the self-assessment report and awarded the same grade as given in the report.

#### *STRENGTHS*

- ◆ frequent and supportive monitoring of trainees' progress
- ◆ wide range of placement opportunities
- ◆ job rotation widens range of trainees' skills
- ◆ high retention levels



### *WEAKNESSES*

- ◆ lack of knowledge of programme requirements by some trainees
- ◆ employers' own training activities not always integrated
- ◆ some evidence gathering opportunities missed
- ◆ underdeveloped use of training support materials

23. Assessors usually visit trainees fortnightly in the workplace. Each visit is well organised and focused on trainees' development and progress. Employers provide a wide range of opportunities within the working environment and many trainees are able to undertake additional NVQ units. Assessments using audiotaped evidence are sometimes used for trainees with learning difficulties. Most employers have a policy of job rotation and trainees increase their employability by undertaking a variety of tasks. In one cafe bar, trainees are given comprehensive training in bar work, dining room service, kitchen duties and cashiering which provides them with an extensive range of skills for career development. Training staff track trainees closely if they move from employer to employer and provide good support and encouragement for them to remain on programme. Trainees have been slow to achieve the full qualification, but retention rates are good with 86 per cent of those recruited last year remaining in training.

24. While trainees are informed during induction of the programme structure and assessment procedures, their recall of important aspects is poor. Individual training plans are not fully developed and employers' own training activities are not systematically integrated with the vocational training. This restricts opportunities for broader-based assessment and for monitoring the training being undertaken. Some employers have qualified assessors and skilled work-based supervisors but they are rarely involved in the assessment process. **Some** portfolios lack a variety of evidence such as practical observations and witness testimonies. Little use is made of good teaching aids to support learning and many trainees have to rely on the resources available in the workplace which often lack imagination and many consist of poorly photocopied pages.

### **Health, care & public services**

### **Grade 3**

25. Taurus Training has 67 modern apprenticeships, 27 national traineeships, five other work-based trainees and six New Deal clients on care programmes. Five childcare modern apprentices are subcontracted to another provider. All trainees have employed status and work in a variety of establishments, including residential homes, nursing homes and homes for the elderly, mentally infirm and people with learning difficulties. Five associate assessors support the vocational co-ordinator. Formal training is provided on a weekly basis at a training room located in a nursing home at Crosby. Assessors also provide individual tuition as part of their regular visits to trainees. This occupational area underwent reorganisation just prior to inspection. New procedures have been drawn up, but it is too early to judge if they will be successful. Inspectors agreed with the strengths and

weaknesses identified in the self-assessment report but also identified others. They awarded a lower grade than that given in the self-assessment report.

### *STRENGTHS*

- ◆ flexible and frequent assessor support to meet trainees' needs
- ◆ high level of trainee retention
- ◆ good on-the-job training to develop trainees' skills

### *WEAKNESSES*

- ◆ underdeveloped assessment of key skills
- ◆ some missed opportunities for collecting work-based evidence
- ◆ low achievement rates

26. Assessors visit trainees in the workplace every two to three weeks, arranged to accommodate shift patterns. The visits are valued by trainees and used for assessment, informal learning, feedback and monitoring of progress. Clear targets are agreed on for work to be completed before the next visit. Trainees can contact assessors at any time and are given several contact points. Trainees with particular learning needs receive extra support to help them understand the qualification standards and how to produce evidence to meet them. Retention rates are high at 86 per cent over the last three years. Assessors have built good working relationships with trainees and employers through their regular contacts. Most trainees are very enthusiastic and well motivated to complete their awards and many have plans for a career in the care sector. Employers and trainees appreciate the high commitment of individual assessors in encouraging progression and achievement. The routine use of contact sheets helps to inform employers about which of the trainees' needs should be addressed between visits. Employers are increasingly becoming aware of the needs of trainees and co-operate in the gathering of evidence for portfolios from the workplace.

27. Opportunities for key skill assessment have not been well integrated into trainees' programmes. Some trainees are not clear about their programme requirements. The collection of naturally occurring work-based evidence is underdeveloped and opportunities are missed. Portfolios are often over-reliant on written and simulated evidence. Some observed assessments do not cover all the competencies demonstrated by trainees. Little use is made of assessors based in the workplace. There is no monitoring system to clearly demonstrate that trainees have produced sufficient evidence for their awards and unit accreditation is underdeveloped. Although trainees have assembled evidence within their portfolios, they have been slow to achieve their full awards. Achievement rates have increased recently with 31 of the 210 starters completing.



## GENERIC AREAS

### Equal opportunities

### Grade 2

#### GOOD PRACTICE

*These projects demonstrate the company's involvement in widening participation to disadvantaged groups. The company has strong working links with a national charity which takes excluded school pupils onto a programme of learning to help them with future employment or further training. Teaching rooms are located in the Liverpool centre. Taurus Training offers good support to these young people, by placing them in appropriate work placements, and monitoring their welfare and progress alongside the charity staff. Local disadvantaged young people who have been statemented are well catered for by Taurus Training. They are placed on a 14-week programme, which includes NVQ level 1 in sport and recreation. These trainees receive excellent pastoral support, and are encouraged to integrate with peers from diverse areas within the city of Liverpool.*

28. Taurus Training has a detailed equal opportunities policy which is reviewed annually to ensure that it reflects current legislation. The policy and related procedures are published in the staff handbook and trainees' induction pack. The company is committed to widening participation by the local community and emphasises access to training for those from disadvantaged groups in its mission statement. Advertising and marketing materials include statements promoting the company as an equal opportunities organisation. The company has already started to address one of the weaknesses identified in the self-assessment process. Inspectors identified additional strengths to those in the self-assessment report, and agreed with the weaknesses. They awarded a higher grade than that in the self-assessment report.

#### STRENGTHS

- ◆ comprehensive equal opportunities policy and related procedures
- ◆ active involvement with excluded school pupils
- ◆ strong commitment to helping disadvantaged young people
- ◆ high level of recruitment from minority ethnic groups

#### WEAKNESSES

- ◆ no comprehensive analysis of equal opportunity data
- ◆ underdeveloped links with employers on equal opportunities issues

29. Taurus Training has a strong commitment of equality to opportunity and has clear and detailed policies and procedures. Good policy statements on disabilities, harassment and bullying have been developed. Procedures for dealing with complaints and grievances are well understood by staff and trainees. Equality of opportunity and related issues are carefully discussed in the induction process, and the complaint procedure is well understood by staff and trainees. Complaints are well monitored and dealt with promptly by the senior management team although the number of cases is low. A dedicated committee has recently been formed to develop further the company's aims of embracing equality of opportunity, and includes representation from staff and trainees. All employers sign a statement to agree to abide by the providers' equal opportunities policy and the employers' own policies are checked and kept on file. The company offices and training facilities in Liverpool have reasonable access for trainees with restricted mobility, as most of the teaching rooms are on the ground floor. The office at Manchester has poor access for those with mobility difficulties. The proportion of minority ethnic trainees exceeds that of the local population and there is a good gender balance among staff and trainees. Most trainees have an awareness of equal opportunity

issues and the related procedures. All key staff have recently attended a comprehensive training workshop, specifically designed to raise awareness of equality issues and support for inclusive learning.

30. Links with employers to check compliance and understanding of equality of opportunity have only recently been established, and are not yet an integral part of the organisational structure. There are procedures to ensure that all employers subscribe to the same ideals as the company but these are not rigorously monitored. Although the company collates data on equal opportunities as a requirement of the TECs, this information is not rigorously analysed, and does not inform individual programme planning and target setting.

### **Trainee support**

### **Grade 2**

31. All trainees except those doing NVQ level 1 in leisure, sport and travel have employed status. Four marketing-orientated training advisors carry out recruitment by visiting prospective employers to see whether they have existing employees who are eligible for TEC-funded training. Vacancies offered have to fit in with the current TEC contract requirements. Training advisors set up the documents and visit trainees to explain the training programme to them. Trainees write up a brief history of their previous experience, a job description and an introduction to their employer. Assessors usually visit within two to four weeks and after reviewing the paperwork with the trainee, use it to explain the requirements of the award. One month from the start of the programme Taurus staff carry out a telephone interview to check that trainees understand the requirements. Inspectors agreed with many of the strengths identified in the self-assessment report but considered that some were merely descriptions of normal practice. Some weaknesses identified had already been addressed. Inspectors awarded the same grade as the company.

#### *STRENGTHS*

- ◆ well-developed and effective support system
- ◆ frequent and effective visits to the workplace by training staff
- ◆ extensive involvement of most employers in support arrangements
- ◆ opportunities for trainees to achieve additional qualifications

#### *WEAKNESSES*

- ◆ no systematic initial assessment for basic or key skills in most areas
- ◆ missed opportunities for accreditation of trainees' prior learning

32. Assessors visit the workplace frequently, often at weekly intervals, and they maintain a high profile presence. Trainees have ready access to all training staff through mobile and home telephone numbers and, in some cases, e-mail. Contacts

are often made out of office hours to suit trainees' shift and work patterns to help those with learning difficulties. Trainees are well aware of the grievance procedures and know whom to contact if they are concerned with any aspect of their training. Contact with assessors is an important part of trainee support and this is reinforced by supplementary visits from other Taurus Training staff. A comprehensive audit system of detailed reviews and tracking of trainees backs up this effective system. Individual training plans are regularly maintained and updated following assessors' visits to trainees. Employment and job-search advice, should the trainee become unemployed, is provided beyond the agreed training period. Trainees show a high level of motivation and many have progressed in their workplaces. Good relationships have helped to improve trainees' self-confidence, and this has had a positive effect upon their vocational performance. Employers are fulsome in their praise of Taurus Training. Most employers participate in reviews and receive copies of all reports of visits and action plans. When specific co-operation is needed, such as particular training or work experience, a written request is issued by assessors and signed by the employer. Many trainees achieve additional certificates in basic food hygiene, first aid and health and safety. These awards not only provide added qualifications for trainees but may also be used as good evidence for their NVQ and, in addition, they enhance trainees' status in the workplace.

33. The initial assessment process does not include a systematic assessment of trainees' basic skills except in the leisure, sport and travel occupational area. There is no systematic assessment of key skills, although two members of staff have achieved a qualification as a key skills trainer and others are working towards theirs. Although the initial assessment process takes into account previously certificated achievements, formal accreditation of trainees' prior learning is not done. Four staff members are already appropriately qualified to accredit prior learning and a further three are working towards the award. The lack of accreditation of prior learning is impeding some trainees' progress.

## **Management of training**

## **Grade 2**

34. A managing director and two senior managers lead Taurus Training. There are 26 directly employed staff and 17 self-employed consultants, who work on a subcontracted basis as assessors. There are annual service level agreements for all self-employed associates. Staff have detailed job descriptions and there is an annual appraisal for all permanent staff. New staff participate in a 13-week induction programme, which includes an introduction to equal opportunities and health and safety. The company was accredited as an Investor in People in 1996. Each occupational area is managed by a vocational co-ordinator and monitored through monthly meetings attended by occupational staff. A database is used as a management system for the administrative and review processes. Most of the strengths identified in the self-assessment report were simply normal practice, although inspectors also identified additional strengths. Inspectors awarded a

higher grade than that in the self-assessment report.

#### **GOOD PRACTICE**

*Half-day team building sessions in work time have been organised and demonstrate to employees that management is serious about building links across teams while encouraging staff to work together in an environment away from their workplace. For example, all staff participated in ten pin bowling sessions on Friday afternoons and plans are being made for a paintball or laser point afternoons.*

#### **STRENGTHS**

- ◆ effective communications across vocational areas
- ◆ approachable and open management
- ◆ analysis of questionnaires to staff inform management and staff activities
- ◆ good opportunities for staff development

#### **WEAKNESSES**

- ◆ underdeveloped links with some employers
- ◆ no staff appraisal for associates
- ◆ staff training not systematically evaluated

35. There is an extensive network of meetings, involving all staff across the vocational areas. Monthly occupational meetings always have an agenda item relating to portfolio standardisation and trainees' progress. Assessors sample all portfolios providing a valuable opportunity to check that assessments are being carried out consistently. Monthly cross-sector vocational meetings follow the occupational meetings and are chaired by the managing director. These are well used to deal with issues which have arisen from the specific occupational meetings. Monthly meetings at the heads of vocational areas provide a good forum for discussion and an opportunity to share ideas and good practice across the occupational areas. All staff are given appropriate responsibility to carry out their duties, coupled with the authority and power to make decisions in an autonomous manner. Staff are motivated and encouraged to make suggestions about improvements. These are carefully considered by the management team and have led to improvements within the organisation. Staff are kept well informed of decisions made. Analysis of a recent survey of staff's views resulted in a one-day quality-assurance workshop being organised, which was well received. Trainees who leave early are now followed up by telephone as a matter of routine. The quality-assurance manager, who has often successfully persuaded them to return to their studies and renegotiated completion times, usually visits them. Every opportunity is taken to keep trainees on programme and to encourage them not to waste their efforts. Opportunities for staff development are good and most employers grant time off during working hours for this. Management is totally committed to training and to the company's mission statement, which expresses commitment to training and staff development. Enthusiastic self-employed associates bring in a breadth of experience to the organisation, help to provide examples of best practice and create dynamic staff relationships.

36. Some employers do not support their trainees through the NVQ and do not routinely offer help and encouragement. Taurus Training has recognised this and set up a number of evening workshops to raise awareness among employers. A

newsletter for employers provides up-to-date information about Taurus Training in another attempt to engage all employers. A large number of self-employed associates are engaged as assessors, but they are not included in the full-time staff appraisal system. They receive no feedback on their progress, and have no systematic way of knowing whether they are doing well or how improvements can be made. Although training is ongoing and relevant to the organisation, there is no evaluation of training courses or programmes and the organisation has no way of judging whether there has been any value added to the organisation by the member of staff attending. Taurus Training has identified the lack of development and the late assessment of key skills as issues to be addressed and action plans are in place.

### Quality assurance

### Grade 3

37. Taurus Training meets several quality assurance standards. It achieved Merseyside TEC's Progress Through Quality Award in 1996 and has received annual renewal since. The company has quality-assurance procedures which have been developed and updated throughout the history of the business which also satisfy the quality monitoring requirements of Manchester TEC with whom it also contracts. A quality assurance team meets regularly and comprises the quality assurance manager, a quality assurance inspector and administration support. Questionnaires are regularly used to gather feedback from trainees and employers. A telephone survey of all trainees is carried out after their first month on the programme. Following extensive consultation with all staff and associates, senior managers compiled the self-assessment report. Awareness-raising workshops were held with staff and the views of trainees and employers were fed into the evidence base for the report. Inspectors agreed with some of the strengths and weaknesses in the self-assessment report and identified others. They awarded the same grade as the company.

#### *STRENGTHS*

- ◆ comprehensive quality assurance procedures
- ◆ high level of commitment to quality throughout the organisation
- ◆ good monitoring of workplace health and safety
- ◆ thorough and realistic self-assessment procedures

#### *WEAKNESSES*

- ◆ quality assurance data not fully utilised to inform decision making
- ◆ trainee documentation not consistently updated
- ◆ lack of rigour in monitoring of training in leisure sport and travel

38. The company has comprehensive quality assurance procedures. The

procedures are clearly set out and understood by staff. All accompanying documents are well referenced and dated. The system is efficiently controlled and updates are quickly incorporated. Staff are conversant with the quality assurance manuals and do not hesitate to refer to them, as the need arises. The company responds promptly to external recommendations and is responsive to staff suggestions. The system of occupational team meetings and vocational co-ordinator meetings helps to ensure that a company-wide approach to quality assurance is adopted. The quality assurance team produces an annual plan of internal audits, which is routinely followed. Monitoring of workplace health and safety arrangements is particularly detailed and, before a new establishment is used, the quality assurance team completes a comprehensive audit. Support for employers to meet the required standards is readily available from Taurus' staff and follow-up visits are made on a regular basis. The frequency of these visits is determined by the level of risk identified within a particular operation, with a maximum time between visits of nine months. Internal verification procedures are rigorous with appropriate sampling undertaken which ensures consistency among assessors.

39. The approach to self-assessment is thorough. Plans have already been drawn up to continue the self-assessment process. The involvement of all parties throughout the process has led to an organisation which is self-critical and which strives for continual improvement. The self-assessment report was realistic and well cross-referenced to sources of evidence. The report contained a number of action points, some of which had already been implemented by the time of inspection. However, the action planning lacked detail in terms of target dates and allocation of responsibility.

40. While the quality-assurance procedures are comprehensive, the information generated by the system is not being fully utilised. For example, there is a detailed system to monitor that quarterly reviews have actually been done, but when review documents have not been received, appropriate action is not taken promptly. Feedback received from trainees is gathered in an easily quantifiable format, but the action required in response is sometimes slow to happen. Some trainees' files are not routinely updated following visits and reviews. There is a varied amount and type of information held on trainees' files. There has been no systematic monitoring of the quality of the training within the sport and recreation programme and the training teams' diverse skills and knowledge have not been co-ordinated to assure quality of training.