

INSPECTION REPORT

Summerhouse Education & Equitation Centre

06 August 2002



ADULT LEARNING
INSPECTORATE

Grading

Inspectors use a seven-point scale to summarise their judgements about the quality of learning sessions. The descriptors for the seven grades are:

- *grade 1 - excellent*
- *grade 2 - very good*
- *grade 3 - good*
- *grade 4 - satisfactory*
- *grade 5 - unsatisfactory*
- *grade 6 - poor*
- *grade 7 - very poor.*

Inspectors use a five-point scale to summarise their judgements about the quality of provision in occupational/curriculum areas and Jobcentre Plus programmes. The same scale is used to describe the quality of leadership and management, which includes quality assurance and equality of opportunity. The descriptors for the five grades are:

- *grade 1 - outstanding*
- *grade 2 - good*
- *grade 3 - satisfactory*
- *grade 4 - unsatisfactory*
- *grade 5 - very weak.*

The two grading scales relate to each other as follows:

SEVEN-POINT SCALE	FIVE-POINT SCALE
grade 1	grade 1
grade 2	
grade 3	grade 2
grade 4	grade 3
grade 5	grade 4
grade 6	grade 5
grade 7	

Adult Learning Inspectorate

The Adult Learning Inspectorate (ALI) was established under the provisions of the *Learning and Skills Act 2000* to bring the inspection of all aspects of adult learning and work-based training within the remit of a single inspectorate. The ALI is responsible for inspecting a wide range of government-funded learning, including:

- work-based training for all people over 16
- provision in further education colleges for people aged 19 and over
- **learndirect** provision
- adult and community learning
- training funded by Jobcentre Plus
- education and training in prisons, at the invitation of her majesty's Chief Inspector of Prisons.

Inspections are carried out in accordance with the *Common Inspection Framework* by teams of full-time inspectors and part-time associate inspectors who have knowledge of, and experience in, the work which they inspect. All providers are invited to nominate a senior member of their staff to participate in the inspection as a team member.

Inadequate provision

A provider's provision will normally be deemed to be less than adequate where

- one third or more of published grades for occupational/curriculum areas and Jobcentre Plus programmes are judged less than satisfactory, or
- leadership and management are judged to be less than satisfactory

The final decision as to whether the provision is inadequate rests with the Chief Inspector of Adult Learning. The overall judgement as to whether the provision is adequate or inadequate is included in the summary section of the inspection report.

SUMMARY

The provider

Summerhouse Education & Equitation Centre is a family partnership based in Hardwicke, Gloucestershire. There are three advanced modern apprentices, 10 foundation modern apprentices and two learners on national vocational qualification (NVO) training following programmes in horse care. Learners are either at the Summerhouse centre or at other stables in the area.

Overall judgement

The quality of provision is adequate to meet the reasonable needs of those receiving it. Work-based learning in the land-based area is outstanding. Leadership and management are good. Equality of opportunity and quality assurance are both good.

GRADES

Leadership and management	2
Contributory grades:	
Equality of opportunity	2
Quality assurance	2

Land-based provision	1
Contributory grades:	
Work-based learning for young people	1

KEY STRENGTHS

- effective strategic management
- good linking of self-assessment to business planning
- good use of external links
- good resources for training
- good initial assessment to plan learning
- particularly good, well-planned training
- wide range of opportunities for learners to broaden experience

KEY WEAKNESSES

- little use of data analysis
- poor organisation of quality assurance policies and processes

OTHER IMPROVEMENTS NEEDED

- more formal monitoring of equal opportunities in the workplace
- more use of work-based evidence in portfolios

THE INSPECTION

1. A team of three inspectors spent a total of nine days at Summerhouse Education & Equitation Centre (Summerhouse) in August 2002. They visited three work placements as well as the Summerhouse site and interviewed 13 learners, four workplace supervisors and managers and eight members of staff. They observed and graded five learning sessions and observed three assessments. Inspectors examined records of assessments, learners' portfolios, individual learning plans, internal verification records, learners' and employers' agreements and files, feedback sheets, external verifiers' reports, statistics, minutes of meetings, records of staff training and development, policies and procedures.

Grades awarded to learning sessions

	Grade 1	Grade 2	Grade 3	Grade 4	Grade 5	Grade 6	Grade 7	Total
Land-based provision	1	1	1	2	0	0	0	5
Total	1	1	1	2	0	0	0	5

THE PROVIDER AS A WHOLE

Context

2. Summerhouse is a family partnership based in Hardwicke, Gloucestershire. There are three partners, two retired and a full-time partner who is the centre co-ordinator. Summerhouse was founded in 1978, mainly to teach recreational riding with a couple of students a year training for external examinations. It is also a riding for the disabled centre. In 1997, Summerhouse had its first government-funded training contract with five learners. Summerhouse also acted as a training supplier to two other equine training providers. Summerhouse now has a contract with Gloucestershire Learning and Skills Council (LSC) for work-based learning for young people. There are three advanced modern apprentices, 10 foundation modern apprentices and two learners on national vocational qualifications (NVQ) training. Learners are either at Summerhouse or with other stables in Gloucestershire and Wales. There are 16 full-time and seven part-time members of staff. There are 20 assessors, six of whom are internal verifiers. There is at least one trained assessor at each work placement. Summerhouse acts as a subcontractor to a local college. It also offers work placements to learners on the Life Skills programme with other training providers.

3. The 1991 census shows that the proportion of people from minority ethnic groups in Gloucestershire was 1.8 per cent, compared with 6.2 per cent nationally. In April 2002, the unemployment rate was 2.2 per cent, compared with the national average of 3.1 per cent. The strongest employment growth sectors in Gloucestershire in recent years are distribution, hotels and restaurants and banking, finance and insurance. Employment in manufacturing has declined slightly. The other main sector for employment is public administration, education and health. Gloucestershire has a good proportion of horse-related industries and there are a large number of horse owners who need professional, trained and qualified young people. In 2001, the proportion of school leavers gaining five or more general certificates of secondary education (GCSEs) at grade C or above, was 58 per cent, compared with 47.9 per cent nationally.

Work-based learning for young people

4. Achievement rates for advanced modern apprentices are currently satisfactory and have improved greatly since 1997. In 2000-01, 45 per cent of learners completed their full modern apprenticeship framework with 5 per cent of learners still working towards their qualification. Achievement rates for level 2 of the NVQ are good and have averaged 74 per cent, while achievement rates for level 3 NVQ have recently improved to an average of 46 per cent between 1999 and 2001. Achievement rates for foundation modern apprentices have declined from 75 per cent in 1998-99, to 30 per cent for 2000-01. However, the number of starters between 1998 and 2000 were small. Current learners are making excellent progress and are on target to achieve their NVQ and key skills. Most learners make excellent progress and are encouraged to be ambitious. In 2000-01, 94 per cent of all learners leaving their training early entered employment within the horse industry. This has risen steadily since 1998-99, when only 25 per cent of early leavers stayed in the industry.

5. There are good resources for training in horse care including stable facilities, equipment and well-trained and experienced staff. The comprehensive initial assessment is effectively used to plan learning and the structured training plans ensure that all learners have some formal training every day. Learners have a wide range of abilities and initial assessment identifies additional support needs. These are an integral part of the individual learning plan. The well-planned, frequent assessment and early introduction of key skills enables learners to progress well. There is a very wide range of additional opportunities for learners which prepares them well for working in the horse industry.

LEADERSHIP AND MANAGEMENT

Grade 2

6. Summerhouse is managed by the full-time partner who is the centre co-ordinator. She works with the other two partners and the senior management team. The senior management team is made up of the yard manager, the administrator and the team training leader. There are 16 full-time staff and seven part-time staff working across all areas of the organisation. Learners on the Summerhouse site are part of the staff team. A business plan is produced each year and is reviewed every six months. The plan is linked to the self-assessment process and the development plan. All plans are discussed, reviewed and revised through consultation at senior team meetings, staff meetings which all learners attend, and work-placement location visits. The development plan is regularly reviewed and actions are monitored. The most recent self-assessment report was produced in May 2002. Summerhouse was accredited with the Investors in People standard in December 2000. This is a national standard for improving an organisation's performance through its people. There is an appraisal system with annual appraisals and six-monthly reviews. Summerhouse has an equal opportunities policy. Links have been established with a city farm project and a riding for the disabled group which uses the facilities every week. Equal opportunities is a standing agenda item at monthly staff meetings.

STRENGTHS

- effective strategic management
- good linking of the self-assessment process to business planning
- good use of external links
- effective internal verification strategy
- comprehensive staff development strategy
- strong commitment to equal opportunities

WEAKNESSES

- little use of data analysis
- poor organisation of quality assurance policies and processes

OTHER IMPROVEMENTS NEEDED

- more formal monitoring of equal opportunities in the workplace

7. There is clear strategic management. The organisation was originally managed solely by the family but, with the retirement of two of the partners, the remaining partner identified that a new system of management was needed. The entire operation was reviewed and consultation took place with the staff. New roles were identified with delegated responsibility and comprehensive job descriptions were developed. Staff

have weekly work and training timetables to ensure that all the tasks are completed and that there is sufficient time for personal development for trained staff and learners. The new structure is continually reviewed and amendments are made when necessary. There is good business planning which is linked to the self-assessment process. The business plan gives a clear description of the past, present and future direction of the organisation. Strategic decisions are based on management information. The business plan is clearly linked to job descriptions and staff appraisals.

8. There are good external links which have been incorporated into business development. The centre co-ordinator is involved with the equine industry group committee at the sector skills council for the environment and land-based sector. This ensures access to up-to-date information and good communication with the equine industry. Summerhouse has also made contact with training providers involved in equine training across the country and has arranged a series of visits to identify good practice. Notes from the first visit show how Summerhouse has effectively implemented some new ideas. Summerhouse has also arranged a meeting of all of the training providers and it is planned that this will happen every six months. The good working knowledge of the equine industry has ensured that the work placements used by Summerhouse meet their high standards. Work is going on to involve smaller stables in the training and to extend opportunities for learners. Local links are supporting the awareness of horses as a recreational activity and as a career. There are links with the city farm in Gloucester and with several inner city schools. Work placements are offered to Life Skills learners with other training providers.

9. There is a very comprehensive staff development strategy which involves the whole staff team, including learners. The induction for learners and staff is very thorough and effective. Many of the staff team started as learners and can still remember their induction. There is an informal meeting at the end of the first week with a formal progress review after four weeks. The four-week meeting ensures that the staff member is settling in well and that progress targets are set. Targets link in with the business plan as well as the individual learning plan. Annual appraisal starts at six months and is followed by a six-monthly review. The appraisal process has recently been reviewed and now fully involves staff in identifying progress and grading their performance. Staff members benefit from this self-assessment and are able to contribute fully to their development. Training needs are identified and entered on to the training target record. All staff complete a pre-course preparation form before attending any specific courses and a post-course evaluation form afterwards. This ensures that training is related to individual and business needs and that the quality and effectiveness of the training is monitored.

Equality of opportunity

Contributory grade 2

10. There is a strong commitment to equal opportunities which is reflected in the views of learners, staff and employers. Summerhouse caters for individuals with a wide range of additional needs. Personal circumstances are taken into account when designing individual learning programmes and providing work opportunities. An equal opportunities checklist which is used by new employees and learners, gives sensitive and thoughtful explanations of questions on ethnicity and personal circumstances.

11. Staff and learners receive a copy of the equal opportunities policy during induction. They also watch a video and complete group and workbook activities, which effectively develop their individual awareness of discrimination and harassment in the workplace. The importance of equality of opportunity is reinforced six months after the start of each learner's programme, with further use of the video and workbooks. Arrangements are in place for Summerhouse to make their own video which is more vocationally relevant. There is insufficient ongoing, structured equal opportunities training for existing staff.

12. All learners are regularly scheduled to assist with the weekly riding for the disabled sessions. At one employer, learners watch the training of the paralympic equestrian team as part of their learning programme. These activities are effective in raising learners' awareness of the needs of others. Problems with equal opportunities are raised by learners through progress reviews and regular surveys and are quickly dealt with. Learners are confident about how to complain.

13. Employers are informed about their obligations to equal opportunities in the work placement providers' handbook. The employers' responsibilities for promoting and maintaining fair and equal treatment at work are not sufficiently emphasised in the formal agreements made with Summerhouse. There are few arrangements for monitoring equal opportunities with existing employers. The visit report form checks learners' understanding of equal opportunities, but does not monitor the employer.

Quality assurance**Contributory grade 2**

14. All staff and work-placement providers are fully involved in the self-assessment process. The development plan clearly sets out the developments for the year, linked to the outcomes of self-assessment. The development plan is very clear and easy to use and has actions with priority levels and identifies the impact and success factors. Staff are fully aware of the plan and are involved in its review and ongoing implementation. Internal communication is good and the structure of meetings ensures that everyone is kept fully up to date. The regular visits to work placements are effectively used to keep employers and learners fully informed about activities. The self-assessment report is well written and clearly states the judgements made. Inspectors gave grades higher than all those given in the self-assessment report. Inspectors agreed with all the identified strengths and most of the identified weaknesses had been resolved in the development plan. The organisation is very self-critical and has not fully recognised the quality of its provision.

15. Internal verification arrangements have recently been reviewed and an improved internal verification policy and strategy is now in operation. The strategy includes effective practices to monitor progress of new learners during and at the end of their induction. Portfolios of evidence include a detailed and thorough schedule for sampling and detailed records of effective internal verification practice. Internal verification of units is undertaken every three months. Completed portfolios are also subject to internal verification. Learners understand the role of the internal verifier and the importance of internal verification. Assessors and learners attend a weekly workshop which is led by an internal verifier. These sessions are used effectively by learners and assessors to plan assessments, to work on portfolios, to seek guidance from the internal verifier and, when appropriate, submit parts of their portfolios for internal verification. This practice is also carried out at work placements.

16. A considerable amount of work has taken place on the development of the quality assurance system. All the key policies have been drawn up and the operational processes have been developed and linked to forms and paperwork. The main operational areas are included, but there is no process for an overall review of the business, taking account of the feedback and data collected. This takes place informally at present. The policies, processes and paperwork are all on the computer system but are not well organised. It is not obvious how to access all of the information, and paper copies of the system are kept in a variety of places. Staff know how to carry out their responsibilities but do not have an overview of all the quality assurance arrangements.

17. Summerhouse is working hard to improve its collection and analysis of data. A spreadsheet has been developed to ensure that learners' progress is effectively monitored. There has been some confusion about the management information system during the transfer from the training and enterprise council (TEC) to the LSC, but training has now taken place and the system is beginning to produce detailed reports to support business planning and continuous improvement. There is little detailed analysis of this data, although it is part of the development plan and good progress has been made.

Good Practice

At the end of their induction, learners complete a questionnaire which focuses on how effectively they have settled into their NVQ programme. The questionnaire is used as a discussion point in a meeting between the learner and their allocated internal verifier.

An employer identified that a learner's hearing impairment was affecting their ability to understand instructions during a riding lesson. The employer purchased a two-way radio. The use of this radio has significantly improved the learner's experience during riding lessons.

AREAS OF LEARNING

Land-based provision

Grade 1

Programmes inspected	Number of learners	Contributory grade
Work-based learning for young people	15	1

18. There are three advanced modern apprentices and 10 foundation modern apprentices working towards NVQs at levels 2 and 3 in horse care. There are also two learners on NVQ training working towards a level 1 NVQ in horse care. Learners are recruited through local radio advertising, careers days, the Summerhouse website and directly from employers. Most training and assessment takes place in the workplace and all workplaces have at least one qualified work-based assessor. Learners also attend Summerhouse for extra training and assessment if required. All staff are occupationally competent and have appropriate assessor qualifications. There are 20 work-based assessors. Induction is carried out in the workplace. Key skills are assessed using work packs of assignments which are relevant to the horse industry. Many assessors have key skills qualifications. All modern apprentices attend off-the-job training for information technology (IT).

The following tables show the achievement and retention rates available up to the time of the inspection.

Work-based learning for young people														
Advanced modern apprenticeships (AMA)	2001-02		2000-01		1999-2000		1998-99		1997-98		1996-97			
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
	Number of starts	3		20		32		25		26		7		
Retained*	0		9		16	50	5	20	6	23	4	57		
Successfully completed	0		9		15	47	5	20	6	23	4	57		
Still in learning	2		1		0	0	0	0	0	0	0	0		

*retained learners are those who have stayed in learning for at least the planned duration of their training programmes, or have successfully completed their programme within the time allowed

Work-based learning for young people														
Foundation modern apprenticeships (FMA)	2001-02		2000-01		1999-2000		1998-99							
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
	Number of starts	15		20		11		4						
Retained*	1		6		7	64	3	75						
Successfully completed	1		6		6	55	3	75						
Still in learning	9		1		0	0	0	0						

*retained learners are those who have stayed in learning for at least the planned duration of their training programmes, or have successfully completed their programme within the time allowed

Work-based learning for young people																
NVQ Training	2001-02		2000-01		1999-2000		1998-99		1997-98		1996-97					
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
	Number of starts	3		2				8		18		2				
Retained*	0		1	50			4	50	13	72	1	50				
Successfully completed	0		1	50			4	50	13	72	1	50				
Still in learning	2		0	0			0	0	0	0	0	0				

*retained learners are those who have stayed in learning for at least the planned duration of their training programmes, or have successfully completed their programme within the time allowed

STRENGTHS

- good resources for training
- good use of initial assessment to plan learning
- thorough and effective induction
- very effective support for learners
- particularly good, well-planned training
- well-planned and frequent assessment
- wide range of opportunities for learners to broaden experience

WEAKNESSES

- there are no significant weaknesses

OTHER IMPROVEMENTS NEEDED

- more use of work-based evidence in portfolios
- more consistent checking of learner's background knowledge at assessment
- better formal planning and recording of learners' previous experience

19. There are good resources for training. Learners work in a variety of quality yards where employers have good facilities including good-sized indoor and outdoor schools, cross-country fences, modern and traditional stabling, horse walkers and suitable areas for stable management lectures and theory work. There is a wide range of horses to suit all abilities and to enable learners to develop their riding skills safely. Summerhouse has strict guidelines for employers and will not place learners in training environments which do not meet their standards. Most learners have access to computers at their place of work and staff can provide laptops for use. There is a CD-ROM library and a small library of books and videos which learners can borrow. A video recorder is effectively used to film learners every four months to help them to improve their riding. Specialist support, equipment and tuition is available for those who are visually impaired and those with identified additional support needs. All employers have staff who compete regularly, some nationally and internationally.

20. Good use is made of initial assessment to plan the learners' training. All learners have an interview and a riding assessment. Before starting their training, learners have up to one week's work experience at their intended workplace. At the end of the work experience, an assessment form is completed and the results are discussed with the learner and the potential employer. Learners also have a comprehensive assessment of their key skills. The learner and assessor decide which training programme is most suitable for them and which additional qualifications should be included in their individual learning plan. Additional support needs are identified and clearly recorded on the learning plan. Realistic targets are set for the achievement of qualifications. Good use is made of prior learning and learners progress quickly through qualifications. However, there is little formal recording of how previous experience will be used, although it is discussed and planned with assessors.

21. All learners have a thorough and effective induction. Learners are well prepared to start their training and have a very good understanding of the NVQ procedures and processes, including internal verification. All learners have a mentor who is also their assessor. During induction, learners are given a detailed training timetable and a comprehensive NVQ and key skills work pack. Within two weeks of starting training, they have an induction review. This effectively checks that the induction has been completed successfully. It identifies any additional needs, ensures that learners have started to gather evidence effectively and understand how to build their portfolios, and confirms their understanding of health and safety. After four weeks, there is a second review during which learners are set their first NVQ targets on a progress sheet which is kept at the front of their portfolio. This sheet is used effectively to plan and record progress.

22. There is very effective support for learners. They all have a mentor who gives help and guidance during their training. All staff, including senior managers, play an active role in supporting and helping learners who are respected as valuable members of the work team. There is good advice on careers, progression and job opportunities. Learners are encouraged to be ambitious and aim for high levels of achievement and great efforts are made to ensure that they are able to reach their full potential. All learners who leave their training early have a meeting with their mentor and are given careers advice. They are contacted six months later by letter and telephone to check that they are still happy with their decision and to encourage them to re-enter training.

23. There is particularly good, well-planned training. Trainers challenge and inspire learners and teach effectively and sympathetically. All learners have structured, planned training which includes riding, practical stable management, background knowledge lectures and portfolio-building sessions. All learners are given a minimum of 10 hours of training a week but many receive more. Learners can have an intensive training period to prepare effectively for external examinations and to improve areas of work. Trainers are competent, knowledgeable, well qualified and respected by learners. The training follows a weekly training timetable and is recorded on the learner's progress sheet. Learners have reviews every 12 weeks where progress is checked and targets are set.

SUMMERHOUSE EDUCATION & EQUITATION CENTRE

All learners also have a six monthly appraisal. The appraisal sheets are used effectively as evidence for key skills. Summerhouse makes good use of information gathered from the questionnaires to improve training.

24. Assessments are well planned and frequent. Learners are well prepared and confident with the assessment process. Targets are set for assessment and current learners are making good progress. There is a good ratio of assessors to learners and most assessors have a maximum of two learners. Learners do not have to wait to be assessed and can progress as quickly as they want and are able to. Summerhouse offers free training for assessors and internal verifiers and two courses are run each year. Standard setting days are held every six months and there is good attendance. Summerhouse offers a good level of support to assessors and internal verifiers.

25. There is a wide range of opportunities for learners to broaden their experience. Many take other examinations alongside their NVQ. As learners progress and gain experience, they are actively encouraged to participate in a wide range of extra activities. These include taking part in competitions, writing for dressage judges, course building, grooming at competitions, reception duties and customer care, stewarding at competitions, assisting with riding and pony club activities, assisting with riding for the disabled, and setting up for examinations. Some learners have had particularly good opportunities to compete talented young horses and have successfully qualified for regional finals. Some learners have spent periods of up to one month at other professional yards where they have gained good experience of caring for competition horses at the highest level. Other learners have contributed to the development of the Summerhouse website. This all round education prepares them well for working in the horse industry. Three learners are currently working towards a level 2 NVQ in using IT. Summerhouse also offers excellent training courses in child protection and the power of positive thinking.

26. Achievement rates for advanced modern apprentices are currently satisfactory and have improved greatly since 1997. Since 2001, very few advanced modern apprentices have been recruited as Summerhouse has improved their initial assessment and guidance. Summerhouse recognises that some advanced modern apprentices recruited in the past would have found a foundation modern apprenticeship more suited to their needs. Recruitment of foundation modern apprentices has increased. Achievement rates for foundation modern apprentices have declined from 75 per cent in 1998-99 to 30 per cent for 2000-01. However, numbers of starts in 1998-2000 were small. Current learners are making excellent progress and are on target to achieve their NVQ and key skills. Summerhouse has recognised that some inaccurate initial assessment and late implementation of key skills contributed to poor achievement rates for 2000-01. Many of the current learners have achieved their key skills at the start of their training programme. Learner's vocational work is of a consistently high standard. Most learners make excellent progress and are encouraged to be ambitious.

27. Learners' portfolios are satisfactory, but consist mostly of records of practical assessment and written answers to questions. There is little use of diverse evidence.

The portfolio of a learner who has additional learning needs makes good use of real work-based evidence, but this is not the case for learners working towards NVQs at levels 2 and 3.

28. Assessments are carried out thoroughly and carefully and are clearly recorded. However, there is no bank of questions or clear guidelines as to how the assessment should be carried out. There is no formal mechanism in place to ensure that the checking of background knowledge is carried out consistently by all assessors.

Good Practice

One learner who is working towards a level 1 NVQ has additional learning needs and would find it impossible to produce written evidence for the portfolio. The assessor has found imaginative and effective ways to overcome this including the use of photographs, videos and CDs. The learner has basic skills support and this is related directly to the portfolio. Realistic but challenging targets have been set and the learner's confidence has greatly improved.

One yard is the training establishment of a well-known international rider. When this rider is schooling her grand prix dressage horse, learners are actively encouraged to sit in the viewing gallery and watch. The rider involves the learners by asking them questions and encouraging them to discuss the horse and his training. Learners benefit from this experience and are motivated to strive for greater achievement in their own riding.