

INSPECTION REPORT

WS Training Ltd

16 September 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.

Overall judgement

In those cases where the overall judgement is that the provision is adequate, only those aspects of the provision which are less than satisfactory will be reinspected.

Provision will normally be deemed to be inadequate where:

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

This provision will be subject to a full reinspection.

The final decision as to whether the provision is inadequate rests with the Chief Inspector of Adult Learning. A statement as to whether the provision is adequate or not is included in the summary section of the inspection report.

SUMMARY

The provider

WS Training Ltd is a private limited company which provides work-based learning for young people in Suffolk through a contract with Suffolk Learning and Skills Council. The company has two training centres, one in Haverhill and the other in Bury St Edmunds. WS Training Ltd offers training in construction, engineering, technology and manufacturing, business administration, management and professional, information and communications technology, retailing, customer service, and transportation, and hairdressing and beauty therapy. There were too few learners in construction and hairdressing and beauty therapy at the time of the inspection for these areas to be graded.

Overall judgement

The quality of the provision is adequate to meet the reasonable needs of those receiving it. More specifically, work-based learning for young people is satisfactory in engineering, business administration, and retailing, customer service and warehousing. Work-based learning for young people is unsatisfactory in information and communications technology. The leadership and management of WS Training Ltd are satisfactory. The arrangements for equality of opportunity are satisfactory but those for quality assurance are unsatisfactory.

GRADES

Leadership and management	3
Contributory grades:	
Equality of opportunity	3
Quality assurance	4

Engineering, technology & manufacturing	3
Contributory grades:	
Work-based learning for young people	3

Business administration, management & professional	3
Contributory grades:	
Work-based learning for young people	3

Information & communications technology	4
Contributory grades:	
Work-based learning for young people	4

Retailing, customer service & transportation	3
Contributory grades:	
Work-based learning for young people	3

KEY STRENGTHS

- good training
- highly accessible training
- good internal communications

KEY WEAKNESSES

- ineffective initial assessment
- ineffective reviews of learners' progress
- incomplete quality assurance arrangements

OTHER IMPROVEMENTS NEEDED

- better use of workplace evidence
- greater use of management information
- better recording of meetings and follow-up actions

THE INSPECTION

1. A team of nine inspectors spent a total of 36 days at WS Training Ltd (WS Training) in September 2002. Inspectors carried out 31 interviews with staff, visited 31 employers, and interviewed 68 learners and 20 workplace supervisors. They examined 47 portfolios of evidence, 62 individual learning plans, company documents, and documents from the local Learning and Skills Council (LSC) and awarding bodies. Inspectors observed and graded 10 learning sessions. They also studied WS Training's self-assessment report, which was produced in November 2001.

Grades awarded to learning sessions

	Grade 1	Grade 2	Grade 3	Grade 4	Grade 5	Grade 6	Grade 7	Total
Engineering, technology & manufacturing	0	0	4	0	0	0	0	4
Business administration, management & professional	0	0	1	1	0	0	0	2
Information & communications technology	0	0	1	0	0	0	0	1
Retailing, customer service & transportation	1	1	1	0	0	0	0	3
Total	1	1	7	1	0	0	0	10

THE PROVIDER AS A WHOLE

Context

2. WS Training was established in 1995 in Bury St Edmunds. It expanded to the Haverhill training centre in 1999. Most of the training takes place at the company's two training centres, but some is given at three local colleges and at employers' premises. WS Training employs 22 staff including a chief executive, an assistant chief executive and a financial controller. The assistant chief executive is responsible for government-funded training, and has a team of 15 trainers and assessors including three retained staff. WS Training has a contract for youth training with Suffolk LSC. There are 254 learners on work-based learning programmes. Of these, 137 are foundation and 115 are advanced modern apprentices, and two are on other work-based learning programmes. All the learners are employed in businesses in central and western and eastern Suffolk.

3. Most of WS Training's learners live in Suffolk. Suffolk is a rural county and most of its employment is in the service industries. The unemployment rate in May 2002 in Suffolk was 2.3 per cent, compared with the national average of 3 per cent. In 2001, the proportion of school leavers achieving five or more general certificates of secondary education (GCSEs) at grade C or above in Suffolk was 54 per cent, compared with 47.9 per cent nationally. The 1991 census shows that the proportion of people from minority ethnic groups is 2.2 per cent in Suffolk, compared with the national average of 6.2 per cent.

Work-based learning for young people

4. Retention rates are good in engineering and in retailing, customer service and warehousing. The length of programmes for engineering advanced modern apprentices makes it difficult to identify achievement trends from the data available. In 2000-01, only 5 per cent of engineering foundation modern apprentices completed their apprenticeship framework, although 42 per cent are still in training. There have been some poor achievement and retention rates over the past three years in business administration, and some learners have made slow progress. There is also slow progress by learners on information and communications technology (ICT) programmes. Learners in business administration and ICT have been late in starting their key skills training. Achievement rates are satisfactory on retailing, customer service and warehousing programmes.

5. There is a high standard of coaching and training at WS Training. Most off-the-job sessions are used to teach the background knowledge and understanding elements of the national vocational qualifications (NVQs), and to develop learners' key skills. However, learners may also take advantage of commercial training sessions run by WS Training. Training officers establish good relationships with learners, work-based mentors and employers. Learners have easy access to their training officer, who maintains frequent contact with them. Work-based mentors give learners good individual support and skills training. There is a wide range of learning opportunities provided for engineering, business administration, and retailing, customer service and warehousing learners.

6. Initial assessment is weak across all the areas of learning. There is no systematic use of initial assessments, and no diagnostic testing of learners' basic skills and key skills. Induction is weak in business administration and in retailing, customer service and warehousing. Some learners on engineering, business administration and ICT programmes have a poor understanding of the requirements of their apprenticeship frameworks.

7. Employers are insufficiently involved in the review process. Progress reviews for business administration and ICT learners are not used to record learners' progress, set long-term targets, or monitor and update their progress against their individual learning plans and targets. Sixty per cent of ICT learners do not have work roles which enable them to gather workplace evidence for their chosen qualification. In ICT, internal verification does not effectively monitor assessors' performance.

LEADERSHIP AND MANAGEMENT

Grade 3

8. The chief executive has overall responsibility for the management of WS Training. The assistant chief executive manages work-based learning and quality assurance. There is a team of 12 permanent staff including trainers and assessors. There are also three part-time retained assessors for insurance and hairdressing programmes. Staff are based at either Bury St Edmunds or Haverhill. WS Training subcontracts engineering training to three colleges of further education. The company has an equal opportunities policy and procedures. The diversity and equality officer is responsible for equal opportunities, and has relevant experience in this area. The company is accredited with the Investors in People standard, which is a national standard for improving an organisation's performance through its people. WS Training does not have a quality assurance policy, but there is a set of procedures which covers many aspects of recruitment, training and assessment. There are monthly meetings of the team of assessors and verifiers. Although quality assurance is not a standing item on the agenda, the assistant chief executive uses the meetings to discuss it. The assistant chief executive conducts audits of learners' files to check that staff are completing documents properly and on time. Priority is given to conducting checks on staff who are new to the company, but all staff have a sample of their files audited. Self-assessment takes place annually. The current report, produced in November 2001, is the first self-assessment report produced for the company as a whole. WS Training identified in the report that many of its quality assurance systems are relatively new and that others require further development.

STRENGTHS

- good internal communications
- comprehensive staff development
- highly accessible training

WEAKNESSES

- ineffective management of initial assessment
- insufficient awareness of equal opportunities by staff and learners
- inadequate monitoring of training
- incomplete quality assurance arrangements

OTHER IMPROVEMENTS NEEDED

- better recording of meetings and follow-up actions
- greater use of management information
- more materials to promote recruitment to under-represented groups
- greater awareness of self-assessment outcomes by staff

9. There are good internal communications at WS Training. The assistant chief executive works closely with the chief executive to ensure that performance is monitored effectively. They have daily contact and meet regularly to discuss issues affecting training. Both visit the training centres frequently, and are open and accessible to all staff. News and issues affecting learners are discussed at regular meetings at all levels of the company and across different functions. Some meetings are minuted, but many informal ones are not and it is not always easy to follow up actions and monitor progress. Monthly full-team meetings and weekly site meetings are used to monitor performance and update staff on developments affecting the training programmes. Assessors' meetings are used to discuss individual areas of learning and share best practice. Staff interviewed found these meetings useful. Individuals also meet the assistant chief executive regularly to discuss and review caseloads. Staff find this valuable in providing support to help them improve their own performance and that of learners.

10. There is a comprehensive staff development programme. Training is planned with all staff from when they join the company. It is focused on improving the skills of staff to help them meet learners' needs more effectively. For example, staff are working towards key skills qualifications to improve their understanding of learners' experience with key skills. Staff have appraisals at which their performance is assessed. These are used as a basis for constructive discussion and to plan training effectively. Training is well managed to help individuals carry out their current jobs and to prepare them to take on new job roles. Staff work towards qualifications at all levels, including NVQs and teaching qualifications. They also undertake coaching courses to help them support learners with additional learning needs. Training is actively encouraged by the company, and it is linked to the needs of the individual and those of the organisation. Target dates are set to ensure it is completed within a reasonable time.

11. The management of initial assessment is ineffective. The company has a member of staff with specific responsibility for initial assessment, but there is no effective system for assessing the needs of learners when they join the programme. Initial assessment is not consistent. In some cases, there is no initial assessment, in some there is a key skills test and in others a spatial awareness test. There is no basic skills screening or learning styles assessment. Learners' additional support needs are not always identified until later in the training programme. In some cases, prior learning is not accredited. WS Training does not systematically use initial assessments or diagnostic testing of basic and key skills to design learning plans or plan progress reviews.

12. The monitoring of training is inadequate. Although there is evidence of good training at work this is not always linked to the NVQ. Employers are not fully aware of their responsibilities in the training process. Workplace supervisors are not sufficiently involved in the planning of training or the review of individual learners' progress. Many supervisors have little knowledge of the NVQ or how they can best support learners with their training. There is insufficient use of evidence from the workplace to demonstrate learners' competences.

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13. WS Training has a comprehensive management information system which is used to monitor its performance against the contracts with the LSC and the assessors' caseloads. The company has identified that the management information available is not currently being used to its full potential.

Equality of opportunity**Contributory grade 3**

14. WS Training provides highly accessible training for most learners. One training centre has very good access for learners with mobility difficulties. A learner who lives in a rural area and has transport difficulties, is driven to the training centre by the assessor for off-the-job training. There is good individual coaching by assessors which develops learners' personal and key skills. This individual training is highly valued by most learners. Learners may attend the training centres in the evenings or at weekends. The company has worked effectively with a local charity to help learners employed by small businesses attend college. The charity provides financial support to the employers to cover the cost of releasing staff. There are effective half-day courses that develop skills which are useful for employability and progression and are valued by learners. One of these courses is very effective in developing learners' skills in handling people and dealing with difficult situations. It focuses on how to deal with harassment and bullying, and has an actively anti-racist and anti-sexist content. Learners are encouraged to reflect on their own workplace experiences. In this way, all learners are given practical ways of protecting themselves against unfair practices, and avoiding treating others unfairly. Training is also offered on employers' premises. Attendance is maximised by inviting learners from other employers to attend. WS Training encourages members of under-represented groups to take part in training. A female engineering learner was recently selected as one of the four finalists for apprentice of the year. WS Training had encouraged her and enabled her to progress and be promoted in her workplace.

15. Discussions with staff and learners in all areas of learning indicate that their awareness of equal opportunities is limited. Progress towards establishing the policies and procedures is slow. Equal opportunities issues are not adequately covered at induction, and there is no detailed discussion on dealing with bullying and harassment. Equal opportunities is frequently raised in learners' progress reviews by staff but there is no central monitoring of the findings. There is no effective method of using the information collected to further develop equal opportunities. The language used in much of WS Training's paperwork, including learners' handbooks, is complex. WS Training recognises this and is planning simplified documents for learners and employers, with more visual images.

16. More materials are needed to promote training to under-represented groups. The foyer display at one training centre includes photographs of learners from under-represented groups. Material to attract such learners is being planned and devised at staff meetings. Resources are not discriminatory, but, at present, most do not actively promote recruitment from non-traditional learners.

Quality assurance**Contributory grade 4**

17. There are no procedures to evaluate the quality of training provided by employers. This weakness was identified in the self-assessment report. The development plan includes a commitment to observe the training provided by employers, but observations have not yet started. There is no systematic evaluation of the quality of off-the-job training. The assistant chief executive does observe training given by newly appointed

members of staff, but there are no plans to observe training as part of the company's quality assurance arrangements. Learners are asked to complete feedback forms after each workshop session. Individual issues are followed up as they arise, but there is no overall analysis of the feedback or any identification of trends. WS Training subcontracts some of its training to local colleges. A service level agreement exists for one of the colleges, but agreements with the others have not yet been finalised.

18. Systems to assure the quality of training are incomplete. WS Training has recently introduced a series of questionnaires to be sent out to a large sample of learners. In previous years, smaller surveys have been carried out. At present, there is no formal mechanism for gaining the views of employers. Targets for improving learners' retention and achievement rates are too imprecise to be effective. Some good use is made of management information. Individual staff are aware of target completion dates for their own learners. They are much less aware of the overall annual pattern of retention and achievement by area of learning. The business plan contains a target of an annual percentage increase in the overall rates of retention and achievement, but the targets are not based on a realistic assessment of current performance in each area of learning. The management information system is used to analyse the reasons why learners leave early. The data are evaluated to identify areas for improvement.

19. Internal verification is thorough and the processes are well documented. The assistant chief executive and the lead internal verifier make regular visits to observe assessors, and they complete a form which provides assessors with useful feedback on their performance. Learners also complete a questionnaire which is designed to demonstrate that they understand the assessment process and the appeals procedure. There have been some recent delays in conducting internal verification in some areas of learning.

20. The chief executive and the assistant chief executive wrote WS Training's self-assessment report. Staff were consulted, and the draft report was considered at the monthly meetings of assessors and verifiers. Inspectors found that some staff were unclear about the report's contents in relation to their own area of learning. The report correctly identified a number of strengths and weaknesses in the training provision. Some strengths and weaknesses were not substantiated by the evidence, and the source of evidence was not indicated. Some weaknesses were not identified by self-assessment. The report was mainly accurate in assessing the quality of the training provision. Inspectors gave many of the same grades as the report. They gave lower grades for information and communications technology and quality assurance.

Good Practice

A member of staff is being given training to national standards in basic skills, so that she can support learners with specific basic skills needs

AREAS OF LEARNING

Engineering, technology & manufacturing

Grade 3

Programmes inspected	Number of learners	Contributory grade
Work-based learning for young people	85	3

21. WS Training offers training for foundation and advanced modern apprentices in engineering, technical services, manufacturing and fabrication, and performing manufacturing operations. There are 85 learners, 51 on foundation modern apprenticeships and 34 on advanced modern apprenticeships. Nine of them are women. Most learners are recruited directly from employers. Many work in small rural businesses and some have key roles within their organisations. Learners complete a standard induction programme which includes health and safety and, in some cases, an initial key skills assessment. WS Training subcontracts off-the-job training to a number of colleges that are local to the learners. All learners are trained, observed and assessed in the workplace. They are visited by training officers every four weeks. Key skills projects are completed independently by learners, but the projects are not always vocationally relevant.

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)	2002-03		2001-02		2000-01		1999-2000							
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
	Number of starts	6		16		7		15						
Retained*	0		0		5		2							
Successfully completed	0		0		0		2							
Still in learning	6		14		5		9							

*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)	2002-03		2001-02		2000-01		1999-2000							
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
	Number of starts	10		32		19		16						
Retained*	9		0		1		13							
Successfully completed	0		0		1		4							
Still in learning	9		25		8		9							

*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 training in the workplace
- good assessment practices
- very effective support for learners from employers and training officers

WEAKNESSES

- weak induction into WS Training
- poor understanding of modern apprenticeship frameworks by learners and employers

OTHER IMPROVEMENTS NEEDED

- better use of occupationally relevant evidence for key skills
- better planning and tracking within the internal verification processes
- more effective links between on- and off-the-job training

22. There is good training in the workplace, and a wide range of learning opportunities is provided. All training and assessment take place in the workplace. After their initial induction and training by their employers, learners are involved in real work and most use sophisticated equipment in their day-to-day activities. Experienced and skilled work-based mentors give the learners good individual support and skills training. Learners rapidly gain confidence in their abilities, and are given more complex and demanding tasks as their level of competence improves. The training and assessment often exceed the requirements of the modern apprenticeship framework and many learners achieve additional qualifications. Among the courses available are those covering the abrasive wheel regulations.

23. Training officers who are qualified assessors visit learners regularly in their workplaces every four weeks to carry out observations, assessments and reviews. There is good use of a wide range of assessment methods including observations, witness statements, examination of products, and written and oral questioning. Training officers establish good relationships with learners, work-based mentors and employers. Learners are assessed frequently, as their progress demands. Additional visits are made, as required, to meet the needs of learners. For those on shifts, this can involve visits late at night.

24. Learners value the very effective support they are given by training officers and

work-based mentors. Regular visits by training officers to the workplace help to identify individual needs and provide support to meet them. Training officers frequently observe learners completing day-to-day tasks, discuss their technical knowledge and give feedback. At every other visit, a formal review of the learners' progress takes place and clear targets are set for the next scheduled meeting. Where additional training is identified, this is provided on a one-to-one basis either by the workplace mentor or the training officer. Engineering training officers also assess and coach the learners in the key skills element of the programmes. Learners attend training sessions at either of WS Training's training centres. Most of these sessions relate to background knowledge and understanding of the NVQs, and to key skills development. Training officers are easily accessible to learners. They give learners their telephone number and e-mail address so that they can be contacted readily.

25. Insufficient use made of initial assessment to plan learners' training programmes. WS Training sometimes assesses learners' literacy and numeracy using past key skills examination papers. Prior attainment, although recorded, is not reflected in an individualised training programme for the learner. Most learners are given a mechanical competence test, but it is not clear how this is used to plan training programmes or identify learners' support needs. Each learner has an individual induction into their training programme in their workplace. It is scheduled to last for a morning and consists largely of completing documents and record forms. The rural nature of Suffolk and the staggered recruitment often means that learners are not aware of other learners on similar programmes. They are not brought together to discuss the common elements of their apprenticeship frameworks, and do not have the opportunity to explore the wider aspects of health and safety or equal opportunities. Learners do not recognise the significance of the relationship between WS Training and their employer.

26. Most foundation modern apprentices do not understand the component parts of their apprenticeship framework. Many are unaware of the requirements of their NVQ, and they do not understand the relationship between the on- and off-the-job training they receive. Most learners are unaware of the assessment appeals procedures or the verification requirements of their NVQ.

27. All key skills training is carried out and assessed by WS Training's staff. It usually consists of projects designed to be completed individually by the learner between the monthly review meetings. These projects are well designed and provide both for learning and assessment. However, little or no use is made of evidence drawn from the learners' working environment to enhance the learning.

28. Although the internal verification system is adequate and complies with awarding body requirements, sampling and tracking records are not always kept up to date. Internal verification at unit level is not always recorded.

29. Most of the programmes consist of work-based learning and supportive off-the-job training provided by a local further education college. The knowledge gained on and off the job is seldom linked. Activities are sometimes duplicated or knowledge is not

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reinforced. WS Training has recently arranged for a training officer to liaise with the college. However, meetings have yet to take place, and it is too early to comment on the effectiveness of the initiative.

Good Practice

WS Training has secured support from a charitable trust to fund extra programmes for learners from small rural enterprises. This is used to enable the learners to take part in college programmes.

Business administration, management & professional**Grade 3**

Programmes inspected	Number of learners	Contributory grade
Work-based learning for young people	76	3

30. There are 76 learners on business administration, management and professional programmes. There are 36 foundation modern apprentices, of whom 17 are working towards qualifications in business administration, 15 in insurance and four in accountancy. There are 40 advanced modern apprentices, of whom 28 are working towards qualifications in business administration, six in insurance, four in accountancy and two in management. Learners on foundation modern apprenticeships are working towards an NVQ at level 2 and advanced modern apprentices are expected to gain an NVQ at level 3. All learners are employed in organisations in Suffolk and north Essex. These include solicitors' offices, large insurance companies, accountancy practices and freight services. Training for two accountancy learners is subcontracted to a local college. Five accountancy learners are studying using distance learning courses. One other accountancy learner is being assessed by WS Training. Learners undertaking insurance NVQs attend occasional off-the-job training sessions, often held at employers' premises. Administration and management learners attend half-day off-the-job training sessions at the WS Training's Haverhill and Bury St Edmunds training centre. There are seven assessors working in this area of learning. Five are full-time training officers, assessing administration and management. Two are part-time training officers, assessing insurance and administration. All hold assessment qualifications and have relevant occupational qualifications and experience. Assessors visit learners in the workplace every two to six weeks according to individual needs. Most learners are recruited through their employers. The remainder are referred from the careers service. WS Training matches these learners to suitable employers. Assessors carry out an induction to the programme with each learner in their workplace.

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)																
	2002-03		2001-02		2000-01		1999-2000									
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Number of starts	7		41		26		13									
Retained*	0		3		8		8	62								
Successfully completed	0		3		5		8	62								
Still in learning	7		29		4		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)																
	2002-03		2001-02		2000-01		1999-2000									
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Number of starts	12		33		15		27									
Retained*	0		4		8	53	18	67								
Successfully completed	0		4		4	27	18	67								
Still in learning	12		20		4	27	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 individual coaching by training officers
- good range of additional courses
- well-managed insurance programmes

WEAKNESSES

- slow progress by some learners
- weak review process

OTHER IMPROVEMENTS NEEDED

- more use of witness testimonies for assessment purposes
- greater use of workplace evidence for accountancy NVQs

31. Training officers give frequent effective and relevant coaching sessions to learners in their workplace. These include sessions on using databases and spreadsheets, time management, and dealing with difficult telephone callers. Insurance learners receive good training to develop their background knowledge and understanding, sometimes in small groups but more often individually. Accountancy learners receive good support to help them with the work they do for their distance learning course. Management learners receive coaching on developing projects and on people management. All the coaching sessions are well documented in learners' files.

32. There is a good range of additional courses available to learners. Learners on all programmes have access to useful and relevant off-the-job training in topics such as customer care and interpersonal skills. There are also preparation sessions for key skills external tests. Learners may join commercial training sessions run by WS Training, including management skills, assertiveness, specialist ICT courses, and first aid. The participation rate for training courses is good, particularly among management, administration and insurance learners. These courses are offered in addition to the apprenticeship requirements. This was identified as a strength in the self-assessment report.

33. Training and assessment for insurance learners are well planned and well managed. Off-the-job training sessions are well prepared. Assessments and action plans are well documented. There are good systems for tracking the progress of individuals and groups. There is good liaison with employers, most of whom arrange for learners to have time away from their desks to complete their NVQ work. Learners value the easy access they have to their training officer, who keeps in frequent contact with them by e-mail. Employers are sent copies of relevant e-mails, and receive regular charts showing the progress of their learners. However, assessment is not planned to take advantage of any on-the-job training as it is being carried out. Learners make steady progress and produce a good standard of work for their portfolios, which are well ordered and contain ample workplace evidence. Learners are clear about what is required of them. Visits to the workplace are planned well in advance and their frequency is monitored using a spreadsheet. Learners undertaking insurance modern apprenticeships receive good, well-planned technical training from their employers.

34. Some learners have made slow progress towards completing their NVQs. One group of administration learners has had little assessment of their portfolio work. Two learners have only just started working on their NVQ, even though they have been on the apprenticeship programme for over a year. A new assessor has very recently taken over these learners and is now motivating them to complete their NVQ units. Other

learners have had a late start on key skills training. Some have completed their NVQ, and are working on their additional qualifications, but have still not started on their key skills. One learner has completed three key skills units, but was not aware that she had to complete five. Some learners have a poor understanding of the requirements of their apprenticeship frameworks. For example, one learner did not know that she would have to undertake additional units from another NVQ in order to complete the apprenticeship. Many employers are not clear about the requirements of learners' NVQs or apprenticeship frameworks. On-the-job training for learners on administration, management, or accountancy apprenticeships is frequently unplanned. There is no formal planning to link assessment with appropriate on-the-job training.

35. Progress reviews for learners are ineffective. Employers are usually asked to sign review records, but are not always involved in the discussion. Training officers leave detailed action plans for learners after assessment visits. These have short-term targets of two to six weeks for the learner to complete specific actions, such as gathering particular pieces of evidence for their NVQ. Progress reviews are conducted every two months by training officers, usually at the same time as an assessment visit. Learners' progress towards their long-term targets is not recorded on their individual learning plans. Reviews are not used to set targets for completion of each part of the programme, in the context of learners' current progress. For example, learners who have not yet started their key skills are not set challenging targets to encourage them to do so. Reviews are often sparsely documented. The action agreed is often vague and unhelpful.

36. When learners start their programmes, employers conduct an assessment of their abilities and potential. However, it is not sufficiently detailed to identify whether their job matches the NVQ, or to be able to effectively plan future assessments. Not all learners are given an initial assessment test for key skills.

37. Assessors carry out frequent observational assessments in the workplace. Few witness testimonies from line managers and colleagues are used to supplement these assessments. Learners on accountancy NVQs are given simulated assessments, which are accepted by the awarding body. Little workplace evidence is used to enhance learners' portfolios of work and link their everyday work with the simulated assessments.

Good Practice

Learners were asked to grade their level of understanding against a detailed list of objectives at the start of the session, and again at the end. This was an effective way for them and their trainer to assess how much they had learned from the session.

Information & communications technology**Grade 4**

Programmes inspected	Number of learners	Contributory grade
Work-based learning for young people	10	4

38. WS Training offers modern apprenticeships in using information technology (IT). There are seven advanced and two foundation modern apprentices, and one learner is working towards a level 3 NVQ in using IT. All learners are full-time employees in small and medium-sized organisations, including a solicitors firm, a small engineering company and retail distributors. Learners join the programme throughout the year. They are given individual interviews, initial assessment and induction in the workplace. WS Training provides learners with one-to-one IT training in the workplace, and group or individual training at the Haverhill and Bury St Edmunds training centres. A range of additional IT courses is available to learners. There is also a well-established half-day training session at the Haverhill site where learners can receive individual IT coaching. All learners have a designated mentor in their workplace. The mentor is normally their immediate supervisor. Trainers visit learners in the workplace every four weeks to assess their skills, and every eight weeks to review their progress. During these visits assessors observe learners carrying out their everyday tasks. Internal verification takes place at various stages of the programme.

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)	2002-03		2001-02		2000-01												
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	
	Number of starts	3		6		3											
Retained*	0		0		1												
Successfully completed	0		0		1												
Still in learning	3		3		1												

*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)	2002-03		2001-02		2000-01												
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	
	Number of starts	1		3		1											
Retained*	0		1		0	0											
Successfully completed	0		1		0	0											
Still in learning	1		1		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																
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	
	Number of starts	1															
Retained*	1																
Successfully completed	0																
Still in learning	1																

*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 training
- good quality work in NVQ optional units

WEAKNESSES

- slow progress
- ineffective reviews of learners’ progress
- poor match between learners’ job roles and the requirements of the modern apprenticeship framework
- ineffective internal verification

OTHER IMPROVEMENTS NEEDED

- better recording of training
- more use of witness testimonies
- better use of workplace evidence for key skills

39. WS Training provides good flexible training which meets individual learners' needs, develops their confidence and skills, and is valued by learners and employers. For example, one learner, with no previous experience of using presentation software, produced a sophisticated presentation after a short individual coaching session. Many learners are enthusiastic about their training. They are highly motivated and eager to develop their IT skills and achieve their potential. Learners have access to a good range of individual or small group training. Good use is made of laptop computers and software handouts to give effective training in the workplace. Occupationally relevant training courses are available at the two well-designed and equipped centres. Some learners have attended courses in health and safety and in the use of computer applications, which are valued by employers and learners. The details of individual training are not always recorded clearly.

40. Most learners' portfolios contain good quality evidence towards optional units. Learners use examples from their everyday work activities. They demonstrate good presentation skills using graphics packages, use complex formulas in spreadsheets, and design good report layouts using database software. Trainers continually provide appropriate feedback to learners, and set specific and achievable targets in the monthly action plan. The action plan is consistently monitored. Feedback is effective in helping learners to produce good quality evidence.

41. Progress towards achievement of qualifications is slow. Since 1999, two learners have completed all the targets on the modern apprenticeship framework out of a total of 14 who started programmes. The six learners who started since September 2001 have not completed any NVQ units. Some learners have had two or three training officers since the start of their programme. Some require lengthy skills training before they are ready for assessment. Some find it difficult to collect evidence from the work environment. Key skills training and assessment start very late in the programme for some learners. Many employers and learners do not understand the requirements of the modern apprenticeship framework. Progress towards completing the modern apprenticeship is not discussed frequently enough, and employers and learners are not clear about how much of the qualification they have achieved or their expected completion date.

42. Training officers carry out progress reviews every two months, but the reviews are ineffective. Assessors' comments on progress review forms are too general. There is no clear assessment of learners' needs, no long-term targets are set and learners' progress against their individual learning plans is not monitored. Employers and mentors are

insufficiently involved in the review process, and their comments rarely appear on learners' review forms. A workplace mentor for a disabled learner identified a need for confidence building. However, this was not picked up by the trainer at the progress review, and the learner missed a course in confidence building and assertiveness. Specific training requirements identified by employers and learners at initial assessment are not followed up at reviews. In one example, an employer identified a learner's poor numeracy skills. No action was taken during the learner's progress review and no additional numeracy support was provided. Progress reviews are not independently monitored for their quality and effectiveness.

43. Sixty per cent of learners have work roles which make it difficult for them to gather evidence and achieve their chosen qualification. There is insufficient discussion of the job role with the employer and the learner before the learner enrolls on a programme. Training officers provide limited guidance on the suitability of the qualification, and there is insufficient job profiling. Employers and learners frequently select the IT foundation and advanced modern apprenticeships without a clear understanding of the frameworks, the standards and the evidence requirements. In many cases, learners' existing skills and achievement levels are not identified at their initial assessment to ensure a match with the apprenticeship framework requirements.

44. Internal verifiers do not effectively monitor assessors' performance. Since November 2001, the monitoring of assessors has been inadequate. One new assessor has never been observed, and two other IT assessors have been observed only once. The internal verifier has insufficient contact with learners to monitor the effectiveness and consistency of assessment, and identify any problems. Slow progress by learners is identified and noted during internal verification, but action and follow-up by the internal verifier is weak. Internal verification is well established at WS Training, and procedures and forms have been revised following an external verifier's visit. However, the new system has only recently been implemented and it is too early to assess its impact.

45. Learners provide sufficient evidence for their NVQ portfolio. However, the range of evidence is limited. There are few witness statements from workplace supervisors. Learners mainly provide project evidence for the key skills awards. These projects are not always relevant to the work roles of individual learners.

Retailing, customer service & transportation**Grade 3**

Programmes inspected	Number of learners	Contributory grade
Work-based learning for young people	83	3

46. There are 83 learners undertaking retailing, customer service, and warehousing programmes. They comprise 48 foundation modern apprentices, 34 advanced modern apprentices and one learner working towards an NVQ at level 3 in customer service. There are 47 learners on customer service, eight on retailing and 28 on distribution and warehousing programmes. All learners are employed. They are recruited to their programmes by a training co-ordinator, and their suitability for training is checked using their job descriptions and an interview. Learners do not undergo a basic skills test. Learners are given an induction in their workplace. Employers carry out vocational training, and this is supplemented by off-the-job workshops. Learners also have access to commercial training run by WS Training. Some employers encourage learners to attend other external courses. One-to-one coaching and assessments are carried out at the employers' premises by WS Training. Following an initial assessment, key skills training is undertaken at the WS Training's premises. Some key skills workshops also take place at employers' premises. Reviews of learners' progress take place every eight weeks. Internal verification is conducted within each training centre.

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)	2002-03		2001-02		2000-01		1999-2000										
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	
	Number of starts	10		27		6		1									
Retained*	0		0	0	4	67	0										
Successfully completed	0		0	0	3	50	0										
Still in learning	10		21	78	3	50	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)																
	2002-03		2001-02		2000-01		1999-2000									
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Number of starts	21		40		21		2									
Retained*	0		15		12		1	50								
Successfully completed	0		4		6		1	50								
Still in learning	17		25		6		0	100								

*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																
	2002-03															
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Number of starts	1															
Retained*	0															
Successfully completed	0															
Still in learning	1															

*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 range of work experience provided by employers
- high standard of off-the-job training

WEAKNESSES

- weak reviews of learners' progress
- inadequate induction

OTHER IMPROVEMENTS NEEDED

- better use of everyday evidence from the workplace for NVQ assessment
- more effective planning of targets

47. WS Training recruits learners from businesses that provide good work experience. Some employers have a very effective system of on-the-job instruction for learners. They

employ well-qualified and experienced staff who help learners to develop their work skills quickly. Managers, supervisors, team leaders and mentors are good role models. Many of the employers organise job rotation so that learners can gain wider experience and collect a broader range of evidence for their NVQ portfolios. Job rotation also increases the range and diversity of assessment opportunities. Some employers provide effective off-the-job instruction. Learners attend external courses which are well matched to their occupational needs, for example in lift truck training. However, these additional external courses focus upon the employers' requirements rather than the needs of the learner. There are good opportunities for many learners to make progress at work, for example, to supervisor level.

48. There is a high standard of off-the-job training. WS Training runs half-day seminars for learners in subjects such as customer care, dealing with complaints, manual handling, telephone techniques and risk assessment. Inspectors observed some of these courses and judged them to be good or very good. The courses are valued by the learners and their employers. Learners may attend any of WS Training's extensive range of commercial courses. Good coaching sessions are given regularly at employers' premises by WS Training's staff. Most of these sessions relate to the background knowledge and understanding elements of NVQs and to key skills development. Trainers are well prepared and have good support materials. The trainer usually starts the coaching session by carefully questioning the learners to determine their level of knowledge, identify weak areas and maximise their participation. Areas of weakness are covered in-depth and at a pace to suit the learner. There is a strong focus on the key issues, and good use is made of the learners' own experiences in describing these. Further questions are asked to test and reinforce learning. Health and safety, and personal development are covered frequently and well. There is good support for learners, with regular and frequent visits by staff. The working relationships between trainers and learners are good. Most support relates to the apprenticeship framework, but trainers can also help with pastoral problems.

49. Few learners leave their programmes early. Of the 44 advanced modern apprentices who have started programmes since 1999, 84 per cent are either still in learning or have successfully completed their apprenticeships. For foundation modern apprentices the proportion is 70 per cent. Learners on warehousing programmes are making slow progress towards their qualifications, and so are some learners on customer service programmes.

50. The reviews of learners' progress are weak. They lack focus and do not have a specific role. Many reviews lack breadth of content and depth of enquiry. Progress towards final achievement is not routinely reviewed. Final and interim target dates for NVQ units are not often revised. Problems with key skills are not clearly identified, and there is no systematic method of reviewing NVQ optional units. There is no record of training organised by employers, or of structured on-the-job learning. Employers are not routinely involved in the review process. In its self-assessment report, WS Training identified the inadequate monitoring of employers' training as a weakness.

51. The learners' induction process is inadequate and not memorable. Learners are given a short, individual off-the-job induction at their employers' premises. Much of the time is spent completing paperwork for the LSC, and working through checklists. The induction arrangements do not cover the NVQ content and standards in enough detail. There is no in-depth discussion on how learners will progress through the NVQ and key skills training. There is no opportunity for learners to meet other learners and progress as a group.

52. WS Training's initial assessment of learners is ineffective. Learners are placed on programmes which reflect what they do at work. Some learners have been employed for several years before starting their training, and there is little evidence of any accreditation of prior achievement or experience. Initial assessment is not used to plan learners' achievement dates on their individual learning plan. Where learning needs have been identified there is no record in the plan to show how these will be met. The process does not identify learners' needs or their preferred learning style. Learners are not given a basic skills assessment. The key skills assessment consists of a self-assessment questionnaire. No actual testing takes place to determine whether the learners' self-assessment is correct.

53. There is insufficient involvement of learners in identifying opportunities for assessment. Learners collect little evidence of their competences through everyday work. Workplace evidence is used on occasions but this is not always seen as a priority. Employers have almost no involvement in the assessment process other than authenticating evidence as the learners' own, and little use is made of witness testimonies.

54. Individual learning plans give target dates for the achievement of NVQ units. Many learners do not meet these dates. Some target dates are unrealistic and are not influenced by the learners' needs. The target dates for NVQ units in customer service do not make sufficient allowance for collecting and assessing evidence which covers several units at once. They are not routinely updated.