

# INSPECTION REPORT

## **Matrix Training and Development Ltd**

08 July 2004



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 learning within the remit of a single inspectorate. The ALI is responsible for inspecting a wide range of government-funded learning, including:

- work-based learning 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

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.

# INSPECTION REPORT

## Matrix Training and Development Ltd

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## INSPECTION REPORT

### DESCRIPTION OF THE PROVIDER

1. Matrix Training and Development Limited (Matrix) is based in Telford. It has offices on the premises of a large manufacturing company, which provides many of its learners. It was formed in 2000 and has contracts with Shropshire Learning and Skills Council (LSC) to provide foundation modern apprenticeships and an employer training pilot (ETP) programme. Matrix also has a contract with Berkshire LSC for a second ETP. Most of the learners are based in Telford, with a smaller number in Bridgnorth and in Reading.
2. Matrix has a senior management team of two directors, and a part-time company secretary. The company also employs five work-based assessors, an internal verifier and an administrator. It contracts with an external consultant to plan and co-ordinate its **quality and auditing** systems.
3. The unemployment rate in Telford is 2.1 per cent, compared with 2.5 per cent nationally. Of those who are unemployed, 34 per cent are aged 18-24, compared with a UK average of 28.3 per cent. At the time of the 2001 census, the proportion of the population from minority ethnic groups was 5.2 per cent in Telford, compared with 9.1 per cent nationally.

### SCOPE OF PROVISION

#### **Engineering, technology & manufacturing**

4. Matrix has offered foundation modern apprenticeships in manufacturing since 2000. In March 2004 it also began an ETP programme. The 144 learners on this pilot programme are working towards a national vocational qualification (NVQ) at level 2 in performing manufacturing operations. Twenty-eight of the work-based learners are working towards an NVQ at level 2 in performing manufacturing operations, while the remaining three are working towards an NVQ at level 2 in food and drink manufacturing. All the learners are employed. Matrix provides off-the-job training on the employers' premises. A team of four staff carry out the training and assessment. One assessor is permanently based at the premises of each of Matrix's main employers.

#### **Retailing, customer service & transportation**

5. The warehousing programme is a relatively new provision. With the exception of two foundation modern apprentices who started in 2002-03, learners have only been recruited since December 2003. Currently, 38 learners are working on level 2 NVQ programmes in warehousing and distribution. Seventeen are working for one employer in Berkshire. The other 21 are employed with three large manufacturing companies in the Telford area. All the current learners are on the ETP programme, and most are over the age of 25. A vocational initial assessment and induction is provided in the workplace. There are four assessors, and an internal verifier who is employed on a contracted basis and normally works two to three days each month.

## ABOUT THE INSPECTION

Number of inspectors	5
Number of inspection days	20
Number of learner interviews	33
Number of staff interviews	22
Number of employer interviews	12
Number of locations/sites/learning centres visited	12

## OVERALL JUDGEMENT

6. The quality of the provision is adequate to meet the reasonable needs of those receiving it. More specifically, the provision in engineering, technology and manufacturing is good, and that in retailing, customer service and transportation is satisfactory. Leadership and management, quality assurance and equality of opportunity are also satisfactory.

## GRADES

*grade 1 = outstanding, grade 2 = good, grade 3 = satisfactory, grade 4 = unsatisfactory, grade 5 = very weak*

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

Engineering, technology & manufacturing			2
Contributory areas:	Number of learners	Contributory grade	
<b>Manufacturing</b>			
- Employer training pilot	144	2	
- Work-based learning for young people	31	2	

Retailing, customer service & transportation			3
Contributory areas:	Number of learners	Contributory grade	
<b>Warehousing and distribution</b>			
- Employer training pilot	38	3	

## KEY FINDINGS

### Achievement and standards

7. **Retention rates are good for the foundation modern apprenticeship programme in manufacturing** and for warehousing and distribution learners. The ETP accounts for most learners, none of whom has yet reached the end of the planned programme. However, of one group of 19 learners working towards a warehousing NVQ, 17 have completed all their work, and are awaiting an external verification visit to confirm their competences. Of a total of 193 learners who have started on the ETP, only 11 have so far left without completing their learning programmes.

8. Achievement rates on all programmes are at least satisfactory, with nearly 50 per cent of learners completing all aspects of their modern apprenticeship framework.

9. **The standard of work produced by manufacturing learners is very good, particularly in health and safety** aspects, and satisfactory standards are reached by warehousing learners.

10. **Some of the warehousing learners who started more recently are making slow progress.** Assessment practice has areas of weakness and some learners have not yet started to gather evidence for their portfolios, despite being on programme for over four months.

### Quality of education and training

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	1	1	0	0	0	2
<b>Total</b>	<b>0</b>	<b>0</b>	<b>1</b>	<b>1</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>2</b>

11. Matrix and its partner employers adopt a particularly thorough and comprehensive approach to health and safety matters. Learners are introduced to the health and safety operations during their company induction, which is subsequently reinforced by Matrix, using materials which incorporate those produced by the employers. Assignment work in health and safety is linked to employer procedures, such as identifying and reporting near misses. Matrix's risk assessment of potential new employers is very thorough.

12. Most of the learners are working towards manufacturing qualifications. These learners are observed particularly frequently by a work-based assessor using the occupational standards. The small group of warehousing learners recruited recently have not had enough observations by assessors, and they have not been given enough assignments or exercises to help them begin gathering evidence.

13. **The monitoring and recording of learners' progress in manufacturing is particularly good.** Matrix uses a computer-based system to record learners' progress. The

information is used to provide regular progress reports for employers and to plan assessments.

14. **Some of the assessment practices adopted by Matrix are inappropriate.** Most of the evidence of learners' competence comes from direct observations, which are conducted well. Other evidence is provided by witness testimonies or statements from their supervisors. Matrix makes too much use of pre-printed standard forms for recording witness statements or employers' comments. The forms do not contain sufficient information about individual learners to show how they have actually demonstrated their competences. This practice has not been challenged by internal or external verifiers.

15. **The ETP is particularly successful at meeting the needs of learners and their employers.** It allows learners who have been working successfully for several years to gain recognition of their abilities and competences using evidence from their daily work. Employers benefit from the increased levels of motivation in their employees, and from sharing best practice with other employers through their regular meetings with Matrix's assessors.

16. **Matrix does not record targets from progress reviews in sufficient detail.** Assessors work closely with most learners to monitor their progress, encourage them, and remind them of deadlines, but not enough of this is formally recorded.

### Leadership and management

17. **Matrix has developed a particularly close and effective partnership with one major employer.** The two organisations share a considerable amount of best practice between them, and with other employers, through contact with Matrix's assessors. Learners benefit from these close relationships in having assignment work that is directly relevant to their routine work.

18. **Matrix makes good use of equal opportunities data** to ensure that it recruits learners that are representative of the employers' workforce and of the surrounding geographical area. One employer has started to analyse its own recruitment activities in the same way, as a result of discussions with Matrix. The proportion of learners from minority ethnic groups considerably exceeds the profile of the surrounding area.

19. **Matrix has a strong commitment to continuous improvement.** Many of the quality assurance monitoring and improvement practices are informal, but they are effective. Managers and staff discuss learners' achievements regularly, and compare them with those of other providers, learners and published data. Assessors and managers respond well to feedback from learners and employers on how to improve the provision.

20. **Matrix does not have a clear strategy for supporting learners with literacy, numeracy or language support needs.** Most learners have an initial assessment before they start their programmes, but Matrix's staff do not have sufficient experience to ensure that they can identify specific needs, or subsequently support the learners. Matrix has recognised this weakness, and has developed good links with other providers to offer language



support.

**21. Internal verification arrangements are inadequate.** Activities are poorly planned and internal verification does not ensure that assessors, learners, qualification units and types of evidence are appropriately sampled. Feedback to assessors is largely verbal and the small amount of written feedback is not sufficiently critical to overcome the weaknesses in assessment practices observed by inspectors.

22. Self-assessment is not an established activity, and the most recent report was not sufficiently evaluative. There are many informal quality monitoring and quality improvement activities, but these are not referred to in the report. The resulting development plan does not have specific targets or sufficient detail to ensure that all staff understand their role in making improvements. Most actions have a deadline of the end of each year, with no interim monitoring dates to ensure progress.

## **Leadership and management**

### **Strengths**

- particularly good partnership working with employers
- good response to staff training and development needs
- good use of equal opportunities data in recruitment
- strong commitment to continuous improvement

### **Weaknesses**

- insufficient planning to provide literacy and numeracy support
- inadequate internal verification
- weak self-assessment and action-planning

## **Engineering, technology & manufacturing**

### ***Manufacturing***

#### ***Strengths***

- good retention rates on the modern apprenticeship programme
- very good standards in learners' work
- particularly good approach to health and safety
- particularly frequent use of direct observation in assessment
- good progress monitoring and record-keeping

#### ***Weaknesses***

- some weak assessment practice
- weak target-setting for learners

## **Retailing, customer service & transportation**

### ***Warehousing and distribution***

#### *Strengths*

- good retention rates
- effectively matched training programmes with the needs of learners and employers

#### *Weaknesses*

- slow progress for some learners
- some weak assessment practice

## **WHAT LEARNERS LIKE ABOUT MATRIX TRAINING AND DEVELOPMENT LTD:**

- 'having a certificate to prove I can do my job'
- 'pride in having something on my curriculum vitae to fall back on'
- helpful and friendly staff
- learning a lot about health and safety
- having the opportunity to gain extra qualifications for promotion
- 'my assessor - who is brilliant'

## **WHAT LEARNERS THINK MATRIX TRAINING AND DEVELOPMENT LTD COULD IMPROVE:**

- 'we could go a bit more quickly - maybe be given more work to do for the portfolio'
- 'more wall displays to celebrate when we get the NVQ'

## **KEY CHALLENGES FOR MATRIX TRAINING AND DEVELOPMENT LTD:**

- establish an effective internal verification system
- implement a strategy to better identify and support learners with literacy, numeracy or language needs
- improve the promotion of equal opportunities for all learners
- provide better support for learners in warehousing and distribution to improve their progress
- improve the links between formal self-assessment and the informal quality improvement processes

## DETAILED INSPECTION FINDINGS

### LEADERSHIP AND MANAGEMENT

**Grade 3**

#### Strengths

- particularly good partnership working with employers
- good response to staff training and development needs
- good use of equal opportunities data in recruitment
- strong commitment to continuous improvement

#### Weaknesses

- insufficient planning to provide literacy and numeracy support
- inadequate internal verification
- weak self-assessment and action-planning

23. Matrix works particularly effectively with employers to secure their full commitment to the training programmes. Assessors work with each employer's key staff to ensure that the programmes meet employers' requirements and that qualification units clearly reflect the working environment. Matrix's assessors are based on the premises of the employers they are supporting to maintain this good level of communication. Employers are kept well informed about their learners' progress, through weekly informal meetings and discussions and formal monthly reports. Matrix and its partner employers share best practice and training resource materials. For example, Matrix has adopted the quality assurance commitment of its main employers, and in turn the employer has introduced initial assessments of literacy, numeracy and language skills as part of their employee recruitment process.

24. Matrix responds well to staff training and development requests and needs. Staff are actively encouraged to attend local LSC events and those offered by local colleges and awarding bodies. Matrix also regularly takes the opportunity to join corporate training events hosted by its largest employer; three staff have recently had health and safety induction training. Staff development and training is prioritised to meet the needs of the learners, the business and awarding body requirements. All staff development is fully funded by Matrix, and in some cases supervisors working for their partner employers have been included in training, without charge. New staff have an induction which includes elements from both Matrix and its main employer partner. The ratio of staff to learners is satisfactory in manufacturing, but not for learners in warehousing.

25. Management of finances and resources is satisfactory. Financial forecasts are regularly monitored and reviewed. The business plan identifies projected savings and expenditure on growth and development.

26. Planning and management of training is satisfactory. All the learners are employed,

some have a background of considerable experience. The directors of Matrix oversee the management and development of the programmes.

27. Information systems are satisfactory. Matrix has developed a standard spreadsheet programme to record data and information about learners. It includes a system to monitor learners' progress which is up to date in manufacturing, but not in warehousing. A satisfactory range of reports is produced to help managers make key decisions; these include learners' progress, retention, achievement, early leavers, and ethnicity.

28. Matrix does not have a formal strategy to support the development of learners' literacy, numeracy and language skills. Learners on the foundation modern apprenticeship and NVQ programmes have an initial assessment to establish their vocational aptitudes and their literacy, numeracy and language skills. The results are used to guide learners to the most appropriate programme, and to determine any additional support needs. However, staff are not qualified or sufficiently experienced to identify or support learners with a specific learning need, such as dyslexia. This weakness was recognised in the self-assessment report, but Matrix has not given sufficient attention to resolving it. Matrix has developed links with a local college to provide language support, and one learner is currently receiving this support.

### **Equality of opportunity**

### **Contributory grade 3**

29. Matrix makes good use of equal opportunities data in monitoring the recruitment of learners. Analyses by gender and ethnic group include comparisons with employers' profiles for all employees and with local demographic patterns. The results of these analyses are used well by both Matrix and its partner employers to encourage participation. One employer now regularly carries out similar monitoring of all its employees as a result of receiving these reports from Matrix. Matrix's analysis shows that the proportion of learners from minority ethnic groups is representative of the employers' profiles and at least matches the demographic profile for the local area. The number of learners who have completed programmes so far is too small to allow a meaningful analysis of the achievement rates of different groups.

30. Matrix's equal opportunities policy and associated procedures are satisfactory. They are reviewed annually to take account of new legislation. Matrix's welcome pack is detailed and includes a clear and well-written explanation of its complaints and appeals procedures, and its anti-harassment and anti-bullying policy. These materials have been shared with its employers' partners, and in one case Matrix and the employer have exchanged materials and presentations to use with other employers, or with employees who are not enrolled on any learning programmes. Matrix also arranged for the welcome pack to be translated into Urdu for one group of learners, and is exploring the demand for versions in Polish and Japanese.

31. Arrangements for promoting and monitoring equality of opportunity are satisfactory. The induction programme for one group of learners is co-ordinated with the general induction programme of Matrix's biggest employer. Matrix's own induction usually takes place about three months after the employer's induction, and this provides a good

opportunity to reinforce learners' understanding of equal opportunities. Learners' awareness of their rights and responsibilities is satisfactory. All the learners interviewed recognised that equality of opportunity involves treating people fairly, rather than treating people equally. Learners' progress reviews include a satisfactory reference to equal opportunities, although in some cases learners' responses to standard questions are not analysed sufficiently.

32. Matrix does not use its own premises for any off-the-job training. Most of its employers have premises that are accessible to people with disabilities. Its largest employer partner is making satisfactory responses to the requirements of the Disability Discrimination Act 1995. These include developing good links with the local Jobcentre Plus disability advisers and carrying out job evaluations to identify appropriate jobs or additional adjustments that could be made.

### **Quality assurance**

### **Contributory grade 3**

33. Matrix has a strong commitment to continuous improvement. Frequent formal and informal staff meetings, involving assessors and directors, provide good opportunities to monitor the progress of learners and compare Matrix's success rates with those of other providers. Matrix makes effective use of learners' and employers' feedback to improve the programmes. Discussions with learners, employers and assessors has led to improvements in NVQ assignments to more accurately reflect working practices and industry standards. Staff are set demanding individual targets for learners' retention and achievement rates. Incentive payments are given to staff for the successful attainments of targets. Learners are given a bonus for completion of key skills qualifications.

34. Effective action is taken in response to external verification. For example, an external verifier expressed concern about an assessor's knowledge competence. This was resolved by the employer providing awareness and familiarisation training. Matrix shares best practice with other employers, as for example in promoting health and safety, and the value of team leaders. Matrix has adopted one major employer's best practice approaches to quality improvement.

35. Quality assurance policies and procedures are satisfactory. Matrix has a comprehensive policy and strategy for quality assurance which has recently been updated and improved. It covers key areas of training and includes a thorough internal audit programme. The policy also identifies other key activities for improvement, feedback, self-assessment, progress reviews, and observations of teaching and learning. It is reviewed annually. Procedures and guides to support the key processes are written clearly and simply, although not all are complete. Some of these processes are more formalised than others and many have not yet had any effect on the quality of provision.

36. Internal verification arrangements are inadequate. This has affected both areas of learning with a range of weaknesses, including assessment practice, portfolio recording and presentation. Internal verifiers conduct sampling of portfolios, observe assessments and question candidates and assessors, but these activities are not planned well enough to ensure the appropriate sampling of qualification units, assessors, learners or types of

evidence. Not enough standardisation meetings have been used to evaluate consistency of assessment decisions and how these are made. Feedback to assessors has been supportive but is not sufficiently critical and is not recorded consistently. A new member of staff who started work in February 2004 has not yet been monitored by the internal verifier, but has completed two observations of assessment for each learner. Feedback from internal verifiers has been acted upon appropriately.

37. Self-assessment and action-planning is weak. The self-assessment report is largely descriptive and is not linked to the quality assurance processes. Learners, staff and employers have little knowledge or understanding of the report and its purpose, although many of the key issues are discussed at team meetings and appropriate actions are taken. Judgements about strengths and weaknesses do not match those of the inspection team. Some weaknesses identified by the provider were considered strengths by the inspection team, while several strengths in the report were judged to be normal practice or weaknesses by inspectors. The development plan concentrates on action to improve the identified weaknesses, but does not have sufficient specific targets to ensure success. Most actions have a deadline of the end of the year, with no interim monitoring dates to ensure progress. Key tasks are not separated effectively into manageable actions, and individual staff responsibilities are not made clear. The development plan and the business plan are not linked sufficiently.



## AREAS OF LEARNING

### Engineering, technology & manufacturing

Engineering, technology & manufacturing		2
Contributory areas:	Number of learners	Contributory grade
<b><i>Manufacturing</i></b>		
- Employer training pilot	144	2
- Work-based learning for young people	31	2

### ***Manufacturing***

#### *Strengths*

- good retention rates on the modern apprenticeship programme
- very good standards in learners' work
- particularly good approach to health and safety
- particularly frequent use of direct observation in assessment
- good progress monitoring and record-keeping

#### *Weaknesses*

- some weak assessment practice
- weak target-setting for learners

### **Achievement and standards**

38. Retention rates are good for the foundation modern apprenticeship programme. In 2002-03 the retention rate was 72 per cent. The ETP began in March 2004 with 151 learners, of whom 144 learners are still on programme.

39. Learners produce very good standards of work, particularly in health and safety. Their work is neat, well written and most examples are well presented. Learners' key skills work in ICT is also to a good standard. Work-based activities on industrial production lines are carried out competently and meet the high demands of the employers' quality assurance systems.

40. Completion rates for modern apprenticeship frameworks are satisfactory. Of the learners who started in 2002-03, 40 per cent have so far successfully completed with a further 10 per cent still in training.

## MATRIX TRAINING AND DEVELOPMENT LTD

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

LSC funded work-based learning																
Foundation modern apprenticeships (FMA)																
	2003-04		2002-03													
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Number of starts	26		78													
Retained*	0		56	72												
Successfully completed	0		31	40												
Still in learning	23		8	10												

\*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

LSC funded work-based learning																
Employer training pilot																
	2003-04															
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Number of starts	151															
Retained*	0															
Successfully completed	0															
Still in learning	144															

\*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

## Quality of education and training

41. Matrix's learners have particularly good health and safety awareness. Health and safety is a major element in their induction to employment, and is reinforced by Matrix during the induction to the learning programme. Learners complete very good-quality assignments to identify and record near misses as part of the health and safety assessment for their NVQ. Learners routinely analyse hazards and levels of risk during their day to work. They are competent to make judgements about the potential for risks and hazards in the workplace, and are rewarded for taking the initiative in exposing and reporting any dangers to their supervisors. Learners report that the training in health and safety provided by Matrix has greatly increased their awareness of its importance. Matrix has a strong culture of promoting health and safety in learners' everyday working practices, and carries out thorough risk assessments on employers' sites. Potential employers are risk banded, and Matrix refuses to work with employers who do not meet its health and safety standards.

42. Assessment by direct observation is particularly frequent, and provides most of the evidence for learners' competence. Assessors give clear written and verbal feedback after each observation, which is discussed in detail. The combination of observation of routine work with professional discussion helps the learners to build up their portfolios

with a minimum of bureaucracy. This is particularly helpful for learners who have been employed for several years but have not worked towards formal qualifications since leaving school. This strength was identified in the self-assessment report.

43. The monitoring and recording of learners' progress is particularly good. Matrix has developed its own computer-based system to record learners' progress. This includes NVQ units, completed key skills and NVQ assignments, key skills test results and the completion of modern apprenticeship frameworks. Matrix's staff use the system to good effect to monitor learners' progress and to compare different groups of learners, for example by gender or ethnic group, in different employers and assessors. The information is used to provide regular progress reports for employers and to plan assessments.

44. The standard of teaching and learning is satisfactory. Most sessions are designed for individual learners. The information provided is clear and concise, and learning materials are good. For example, during one communications session on producing a curriculum vitae, several examples of different types of curriculum vitae were given to the learners in printed and computerised format. Assignments have specific, measurable and achievable targets and deadlines. On-the-job training is carried out by employers' team leaders and line supervisors. They train learners well in the operation of production line equipment for the assembly of car air-conditioning units, the pressing of car body panels, window assemblies and appliance brackets. Some learners develop a range of additional specialist skills with their employers, including the application of power-press regulations, machine setting and crane operation.

45. Matrix has a satisfactory range of resources to support learners. Staff support learners in maintaining or developing skills and improving their personal effectiveness. Assessors and verifiers are appropriately qualified and experienced to perform their roles. Most of the machinery and equipment used for work activities and on-the-job training are good. The training room for the off-the-job training is equipped to a satisfactory level and up-to-date laptop computers are used to support learners' ICT development.

46. The foundation modern apprenticeship programme and the ETP meet the needs of learners and employers. Learners' routine work is well matched with the requirements of the programmes and their need to provide evidence of competence. Learners in particular welcome the opportunity to achieve nationally recognised qualifications. Most learners are aware of the progression routes available to them, particularly the possibility of moving from level 2 qualifications to those at level 3.

47. Matrix provides a satisfactory induction programme for learners. New learners are given a range of information about Matrix during their inductions. The information includes terms and conditions, and complaints and grievance procedures. Staff assess learners' understanding of health and safety, and equality of opportunity, and this is further reinforced during progress reviews and assessments. Learners' understanding of their programmes and how they will be assessed is satisfactory.

48. Some assessment practices are weak. Matrix has prepared standard statements for

use as witness testimonies, and standard summaries to record learners' ability to respond to background knowledge questions. Although these standard documents might be suitable as guides for new assessors, their wording implies that the witnesses have already made their comments, or that learners have already answered their questions. However, inspectors judged that these prepared forms were not being mis-used, for example to indicate competence without sufficient evidence. Some signatories to witness statements are not recorded in advance of assessments. These weak practices were not identified by the external verifier.

49. Target-setting and action-planning for learners are weak. Recorded targets on progress review forms are vague and not linked sufficiently to learning goals. Learners do not receive sufficient guidance about what they need to do to improve their skills. Targets are not sufficiently detailed, do not have adequate deadlines, and do not record short-term objectives. Workplace supervisors are not always present at the progress reviews. Neither supervisors, employers, or in some cases learners, receive a copy of the review.

50. Matrix has satisfactory arrangements to meet the support needs of learners. Learners receive good support from their work-based assessors who meet them regularly, sometimes twice a week. Learners value the support they receive during assignment work and during assessments completed in the workplace. However, Matrix does not assess learners for literacy, numeracy or language support needs sufficiently to ensure that all needs are identified. Where needs are identified, for example, during progress reviews, or through assignment work, Matrix is able to provide some support through an external agency, particularly for language skills. Matrix's own staff are not trained sufficiently to meet these support needs. This weakness was identified in the self-assessment report.

## **Leadership and management**

51. Leadership and management in manufacturing is satisfactory. Matrix communicates well with employers. Staff meetings are held every four weeks. Staff are aware of their roles and responsibilities; they are well motivated and committed to their roles. Matrix keeps employers well-informed of learners' progress. Employers speak very well of Matrix, its staff and the support given to learners. Planning of the modern apprenticeship programme is satisfactory. Targets for framework completion are set and reviewed at management meetings.

52. Learners' understanding of equality of opportunity is satisfactory. The subject of equal opportunities is introduced during induction and reinforced in learners' progress reviews.

53. Internal verification is not thorough enough. Internal verification activities are not well planned. Feedback from internal verifiers to assessors is not sufficiently critical, and there is an over reliance on verbal feedback. The system has not identified weaknesses in assessment practice found by inspectors.

54. Self-assessment is weak, and not sufficiently established. The self-assessment report was not evaluative enough and identified only one strength and one weakness identified by inspectors.

**Retailing, customer service & transportation**

<b>Retailing, customer service &amp; transportation</b>		<b>3</b>
Contributory areas:	Number of learners	Contributory grade
<i><b>Warehousing and distribution</b></i> - Employer training pilot	38	3

***Warehousing and distribution****Strengths*

- good retention rates
- effectively matched training programmes with the needs of learners and employers

*Weaknesses*

- slow progress for some learners
- some weak assessment practice

**Achievement and standards**

55. Retention rates are good. Of 19 learners in Berkshire who started their NVQs in December 2003, 17 have reached the end of their programmes. They have been assessed and internally verified as competent and are waiting for an external verification visit to confirm competences and certification. They have made good progress and achieved their NVQs in six months. Of the 21 learners employed in the Telford area, who began training in March 2004, only two have left the warehousing programme and they are transferring to the manufacturing NVQ because of changes in their job roles. Both the foundation modern apprentices were retained, and one completed the full modern apprenticeship framework.

56. The standard of learners' work is satisfactory. Most already have significant experience in their jobs when starting their NVQ courses. Working towards their NVQs helps them to develop their job roles. Although there are no planned progression opportunities for additional qualifications, achievement of their NVQs helps learners' longer-term employment prospects.

57. Progress for some learners is slow. Although the group of learners based in Berkshire are making satisfactory progress, the learners based in Telford are not. Matrix is focusing on those learners taking manufacturing qualifications, in response to employers' requests. Nine of the 21 warehousing and distribution learners have yet to start gathering evidence for their NVQs, even though their induction was over four months ago. The provider has recognised this weakness, and is currently seeking to recruit another assessor. Formal progress reviews are infrequent and ineffective in driving progress. Learners are not set sufficiently challenging targets, and workplace managers

are not sufficiently involved in the progress reviews.

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

LSC funded work-based learning																
Foundation modern apprenticeships (FMA)																
	2002-03															
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Number of starts	2															
Retained*	2															
Successfully completed	1															
Still in learning	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

LSC funded work-based learning																
Employer training pilot																
	2003-04															
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Number of starts	40															
Retained*	17															
Successfully completed	0															
Still in learning	38															

\*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

## Quality of education and training

58. Employers taking part in the ETP with Matrix initially identified manufacturing as their main area of interest. Matrix introduced the warehousing NVQ when it became apparent that the manufacturing NVQ was not appropriate for some learners because of their job roles. The programme is particularly successful in meeting the needs of learners and employers. The learners are generally very experienced in their job roles, but without any accreditation. They consider the NVQ to be an opportunity to gain formal qualifications, and support applications for promotion, or to secure future employment in a traditionally volatile occupational area. One employer, planning to relocate, was keen for its employees to have the opportunity to achieve an NVQ in case they were unable or unwilling to relocate to the new premises. Learners are motivated to achieve and appreciate the support of the employers and Matrix in helping them achieve their objectives.

59. Induction for learners is satisfactory. It takes place in the workplace, usually on an individual basis. Information is provided about the NVQ standards, and assessment procedures. Aspects such as health and safety, and equality of opportunity, are also

covered adequately.

60. Training is satisfactory. Learners already have experience in their job roles before beginning their NVQs, having received initial training from the employer. Any additional training is given by the employer on the job, with some off-the-job sessions for some learners. If any training need is identified during assessment, the assessor will discuss the issue with the employer and record when the training has been completed. One employer, having identified a need to raise its employers' competence and efficiency, has introduced a new monitoring process to identify individual needs. Employers' procedures are used to support learners' knowledge and understanding. Matrix also has some of its own materials, although these are rarely evident in learners' portfolios.

61. Support for learners is satisfactory. Learners and assessors have good relationships. Assessors' visits are flexible enough to meet learners' needs, such as varying shift patterns. There are not enough arrangements to identify and meet learners' literacy and numeracy needs, although where learners do have poor literacy skills, some support is provided to enable the learners to achieve their NVQs. For example, the assessor will concentrate on assessment by observation and oral questioning rather than ask the learner to produce written work. There is not enough support, however, to improve these skills.

62. Some assessment practice is weak. Although assessment by observation is good, not all learners are benefiting. Portfolios are held by assessors and although learners are able to see the portfolios on request, they are not encouraged to take the initiative and produce their own evidence. A few learners do not understand their qualifications and targets sufficiently, though many confirm that assessors clearly explain the process when planning assessments and providing feedback. Some product evidence is not specific to the individual learner. For example, documents such as job sheets or order forms are photocopied by the assessor and placed in several portfolios. Learners' statements and employers' witness testimonies are pre-prepared by the assessor, although they are not signed by the learners, or their employers until competences have been confirmed. Some assessors' observations are lengthy, recorded as up to four hours, and intended to gather evidence for several units of the qualification at the same time. This time is not always used effectively, however, and in some cases only one unit is recorded as having been assessed.

### **Leadership and management**

63. Matrix has concentrated its efforts on the manufacturing area of learning, at the request of its employers. Management has not taken sufficient action to ensure that all warehousing learners are making satisfactory progress. This situation is being resolved by recruiting another assessor, but this measure has not yet had any effect on learners.

64. Employers and workplace supervisors are kept informed of learners' progress, although Matrix's information system is not always updated to show this information for warehousing learners.



65. Staff are experienced and appropriately qualified, and are well motivated to support learners in achieving their qualifications. They attend meetings, normally every two months, to discuss issues such as learners' progress and internal verification. They work well with employers to make sure that learners are able to gather appropriate evidence for their qualification. Relationships between assessors, learners and employers are good.

66. Learners have a satisfactory understanding of equality of opportunity. They are all employed in organisations that have their own policies and procedures. Matrix monitors equality and diversity at induction and in the new progress reviews which it has introduced to the ETP. However, learners' understanding is not sufficiently checked by exploratory questioning to check that they fully understand issues such as harassment.

67. The self-assessment report provided useful background information about Matrix, but most of the detail referred to the manufacturing provision. The report does not have sufficient separate information or judgments for the warehousing programme. Inspection judgements did not match any of the strengths identified, but did match the weakness concerning literacy, numeracy and language support.