

# Pearson PLC

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## Background information

### Inspection judgements

Inspectors use a four-point scale to summarise their judgements about achievement and standards, the quality of provision, and leadership and management, which includes a grade for equality of opportunity.

#### Key for inspection grades

Grade 1	Outstanding
Grade 2	Good
Grade 3	Satisfactory
Grade 4	Inadequate

Further information can be found on how inspection judgements are made on [www.ofsted.gov.uk](http://www.ofsted.gov.uk).

### Scope of the inspection

In deciding the scope of the inspection, inspectors take account of the provider's most recent self-assessment report and development plans, and comments from the local Learning and Skills Council (LSC) or other funding body. Where appropriate, inspectors also consider the previous inspection report ([www.ofsted.gov.uk](http://www.ofsted.gov.uk)), reports from the inspectorates' quality monitoring or annual assessment visits, and data on learners and their achievements over the period since the previous inspection.

In addition to reporting on overall effectiveness of the organisation, its capacity to improve further, achievement and standards, quality of provision and leadership and management, this inspection focused on specialist provision in:

- Retail and commercial enterprise
- Customer service

## Description of the provider

1. Pearson PLC (Pearson) is part of the multi-national Pearson Education group employing over 10,000 people in 40 countries. The company has a contract with the National Employment Service of the LSC to deliver work-based learning to employees within the group. The company works closely with a subcontracted training company, Elmfield, to run the programmes. Currently 75 learners are on government funded work-based learning programmes. All training is conducted on Pearson premises using their own training rooms and facilities; currently Pearson VUE in Salford and the Pearson distribution centre in Rugby. At Pearson VUE, 22 learners are working towards an apprenticeship at Level 2 in Contact Centre Operations and 23 in Customer Services. At the Pearson distribution centre, 30 learners are working towards an apprenticeship in distribution, storage and warehousing. All off-the-job and some on-the-job training is delivered by Elmfield and the remainder by Pearson's own in-house trainers. The contract is managed by a senior manager within Pearson Shared Services and is also monitored by human resource staff in each location. Elmfield provides a programme manager, staff dedicated to the Pearson contract based permanently on the Pearson sites and supported by other staff based in their own offices at Newcastle-under-Lyme. The training can also be accessed by employees who are not eligible for government funding in which case it is funded by the Pearson group.

## Summary of grades awarded

<b>Effectiveness of provision</b>	<b>Good: Grade 2</b>
<b>Capacity to improve</b>	<b>Good: Grade 2</b>
<b>Achievement and standards</b>	<b>Outstanding: Grade 1</b>
<b>Quality of provision</b>	<b>Good: Grade 2</b>
<b>Leadership and management</b>	<b>Good: Grade 2</b>
<b>Equality of opportunity</b>	<b>Contributory grade: Good: Grade 2</b>

## Sector subject areas

<b>Retail and commercial enterprise</b>	<b>Good: Grade 2</b>
<b>Customer service</b>	<b>Good: Grade 2</b>

## Overall judgement

### Effectiveness of provision

#### Good: Grade 2

2. The overall effectiveness of the provision is good. The provision in both retail and commercial enterprise and customer service is good. Overall achievement and standards are outstanding. Success rates in 2006/07 were excellent. Retention rates are good and those currently in learning are making good progress toward timely achievement of their frameworks. Learners acquire good skills and knowledge supporting their progress through the programme and improving their performance in the workplace.
3. The overall quality of provision is good. Overall effectiveness of teaching and learning is good. The involvement of the employer is outstanding and there is a close match between the requirements of learners' jobs and the frameworks, however, there is insufficient planning of individual training to suit the particular needs of the learners. Programmes and activities meet the needs of learners well and the employer's needs particularly well. Support for learners is very good. Pearson's support for its employees generally and as the employer and provider for learners in this programme is particularly good. The support for learners from Elmfield is also good.
4. Leadership and management are good. Programme management and strategic management are both good. Partnership working with the subcontractor is particularly effective. Strategies to promote equality of opportunity are good. Very effective quality improvement arrangements are in place.

### Capacity to improve

#### Good: Grade 2

5. The provider has demonstrated a good capacity to improve. It conducted a thorough evaluative review of the programme at the end of the first year and instituted a number of improvements before relaunching and extending the programme in the current year. Quality improvement arrangements are very effective and have resulted in a number of improvements. The self-assessment process is thorough and inclusive. It effectively incorporates the views of all stakeholders. The self-assessment report, produced immediately before inspection, is accurate and recognises most of the points identified at inspection. The text is sufficiently critical however, some of the grades in the self-assessment report are slightly over generous. The quality improvement plan is closely monitored and allocates targets and responsibilities for further improvement well. The provider has no inspection history and although the subcontractor Elmfield has also not been inspected in its own right, its staff have been able to draw on experience. This is gained from inspection of a similar contract for which it was also the subcontractor and on advice from training consultants from another Elmfield department.

### Key strengths

- Excellent success rates in 2006/07
- Good acquisition of skills and knowledge
- Very good support for learners

- Good management of programmes
- Good strategic direction
- Particularly effective partnership working with the subcontractor
- Good strategies to promote equality of opportunity
- Very effective quality improvement arrangements

## Key areas for improvement

- The insufficient planning of individual training

## Main findings

### Achievement and standards

#### Outstanding: Grade 1

6. Achievement and standards are outstanding. Success rates in 2006/07 were excellent. The overall success rate was 93% and the timely success rate was 86%. Current learners are making good and in some cases rapid progress toward timely success. Learners acquire good skills and knowledge supporting their progress through the programme and improving their job performance. The pass rate for key skills tests is high at 89% for those taking the test so far in 2007/08.
7. The self-assessment report recognises the strengths in this area. The quality improvement plan includes appropriate measures to maintain or further improve them.

### Quality of provision

#### Good: Grade 2

8. The overall quality of provision is good. Overall effectiveness of teaching and learning is good. The frameworks have been well mapped against the job requirements of the learners. Pearson's training resources and the deployment of staff from Elmfield meet the needs of the learners well. Assessment practices are satisfactory, however, there is not enough planning of individual training to suit the needs of learners. Training sessions take insufficient account of learners' preferred learning styles or abilities. Assessors' use the same methods for all learners. Individual learning plans are insufficiently individualised and are not used effectively to motivate and inform learners of their progress.
9. Programmes and activities meet the needs of learners well, although the nature of the learners' work severely limits their choice of optional units for which their employment can generate evidence. In the first year, more choice was available but due to these difficulties the provider has restricted the choice in the second year. The Level 3 NVQ framework will allow a greater choice of direct job relevant choices when offered in the future.
10. Support for learners is very good. Pearson's support for its employees generally and as the employer and provider for learners in this programme is particularly good. Elmfield's support for learners is also good. Learners benefit from access to health and welfare support in place for all employees and from the permanent presence on site of Elmfield assessors. Information, advice and guidance are good. Literacy and numeracy support are satisfactory. The gender balance and participation by under-represented groups is good and reflects Pearson's wider recruitment.
11. The self-assessment report recognises that some recent improvements in procedures are not yet fully established. The quality improvement plan identifies the actions required well and sets suitable targets for completion.

### Leadership and management

#### Good: Grade 2

**Equality of opportunity**

Contributory grade: Good: Grade 2

12. Leadership and management are good. Strategic direction is good. Senior managers at Pearson carefully investigated the appropriateness of NVQ and apprenticeship programmes for their work force development before identifying the current model and an appropriate subcontractor to support them. They thoroughly evaluated the first year of the programme before deciding to continue with a larger and wider programme incorporating lessons learned from the first year. Senior managers continue to monitor the programmes closely.
13. Programme management is good. Programmes on both sites are well managed by a combination of staff from Pearson and Elmfield. The responsibilities of each are clearly laid down in a comprehensive service level agreement. Programme management has been improved by Elmfield's appointment in January 2008 of a programme manager for the Pearson's contract. Communications between learners' team leaders and Elmfield are good.
14. Partnership working with the subcontractor is particularly effective. Co-operation between Pearson as employer and contractor for the programmes and Elmfield as the subcontractor is very close. The subcontractor delivers its elements of the programmes, which are bespoke to the needs of the employer, using Pearson's excellent in-house training facilities. The relationship results in close co-ordination of on- and off-the-job training and through Elmfield's wider experience a good understanding by Pearson of both NVQ programmes and government funded training programmes. Pearson, as a large international concern, contributes a wider management perspective to the programme and a commitment to personnel development for the learners.
15. Strategies to promote equality of opportunity are good. Equality and diversity are part of the Pearson ethos. The company's strategy, policies and procedures are comprehensive and reflect the latest legislation in this area. They have been further reinforced by strategies and policies specific to these programmes. Learners also benefit from Elmfield's policies and procedures. Learners' understanding of equality and diversity is satisfactory. Equality and diversity issues are covered at induction and as they work through the employee rights and responsibilities workbook. All employees from Pearson have access to on-line learning programmes on equality and diversity. All staff from Elmfield have attended equality and diversity training. At learner progress reviews, staff draw on a bank of questions and suggested discussion topics to check and further promote learners' understanding of equality and diversity issues, however, due to the short duration of some of the programmes and learners' rapid progress many will only have one formal progress review.
16. Quality improvement arrangements are very effective. Elmfield has produced a comprehensive quality manual documenting all the procedures and including arrangements to audit them and to collect feedback. There is an effective programme to observe each stage of the learner journey including on- and off-the-job training sessions, assessments and reviews and to identify action points for their improvement. The evaluation of the programme at the end of the first year identified several areas for improvement, which were addressed although not all actions are yet complete.

17. The procedures for safeguarding learners meet current government requirements. There are no learners under 18 years of age and the provider has not identified any adults as being vulnerable. Health and safety policies, procedures and training are excellent, particularly in the potentially more hazardous distribution centre. The provider offers well publicised avenues for help and advice on welfare and health issues.
  
18. The self-assessment report correctly identified the strengths in leadership and management and a number of aspects which are satisfactory. The quality improvement plan sets out appropriate actions to maintain the strengths and further improve those aspects identified as satisfactory.

## What learners like:

- Good support from assessor
- Relaxed and professional approach
- 'In work-at work-about work qualification'
- Clear about progress being made
- Good explanation of the service
- Open access to the assessor
- Improved understanding of job role
- Very helpful assessor
- 'It confirms I am competent'
- Getting a qualification
- Learning new skills
- Starting to learn again

## What learners think could improve:

- 'Didn't know what to expect from the programme'
- 'What next?'
- Problems trying to get released for time with assessor
- 'Wanted set times to meet assessor'

## Sector subject areas

### **Retail and commercial enterprise**

#### **Good: Grade 2**

#### **Context**

19. Pearson offers apprentice programmes at Level 2 in distribution and warehousing and in contact centre operations. These are delivered at the Pearson Distribution Centre in Rugby, and Pearson Call Centre in Salford. All learners are employed by Pearson, and in many cases have been employed for several years. Staff from the subcontractor, Elmfield, provides training and assessment in the workplace. They also complete reviews of learners' progress. On the warehouse programme there are 29 adult apprentices and one modern apprentice, as well as 21 learners following a qualification in contact centre operations. All learners complete an employment rights and responsibility workbook.

#### **Strengths**

- Good progress towards framework achievements
- Outstanding achievements for contact centre operations in 2006/07
- Good training for workplace skills
- Very good support for learners

#### **Areas for improvement**

- Insufficient planning of individual training

#### **Achievement and standards**

20. Achievement and standards are outstanding. The timely success rate for the contact centre operations programme in 2006/07 was 100%. Progress towards timely success for current learners is good. All learners have completed the employer rights and responsibility workbook. Employee retention at the distribution centre is very good. Recent key skills testing has further progressed several learners in gaining 2 of the 4 key skills requirement in warehousing. The provider makes good use of prior attainment to gain credit for the additional qualifications requirement of the warehousing framework, for example, lift-truck licence, first aid, fire warden and health and safety certificates. Learners are not fully aware of the full key skill requirements for working with others and to improve their own learning. Learners are well presented and fully prepared in health and safety protective clothing. They show good awareness of the importance of health and safety for themselves and others. Learners' work skills are good. Many learners are multi-skilled in more than one department within the distribution centre and in both locations they gain a good range of workplace skills. These include, for example, dealing with complex situations and dealing with difficult or irate customers. Learners' development of personal skills, including self-confidence and motivation is also good.

#### **Quality of provision**

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21. Provision for training is good. Training resources including off-the-job training rooms and equipment are good. Induction is satisfactory, but includes good health and safety training. Pearson trains learners to a high level of workplace skills, delivered on- and off-the-job. Workplaces are clean and tidy and cultivate a good learning and working environment. Learners' attitudes toward learning and achieving are very positive. Training rooms are made available for additional support for key skills in literacy and numeracy. Trainers use a five-hour workshop to assist learners in building portfolios of evidence for the communication and application of number key skills. Although learners appreciate the help they receive in addressing skills forgotten since leaving school, the workshop follows a standard format and does not reflect individual learning needs. In the contact centre, learners complete their key skills test immediately after the training session. Assessment reports describing the learners' achievements at this session are identical. Elmfield provides trainers dedicated to assisting learners' key skills development.
22. Support for learners is very good. Pearson provides very good welfare support to learners, which includes a 'people line', which is a confidential phone line offering advice on learners' personal issues. Healthcare is also available. Learners are offered the chance to buy books at a good discount and other initiatives include financial support for learners to purchase personal computers and bicycles. Employer involvement is good. Team leaders provide witness testimonies to assist the assessment process. Employer health and safety expertise is used in the programme as learners work through those aspects. Elmfield assessors support the programme by visiting learners during their shifts including night and late shifts. Learners value the presence of Elmfield assessors on site. Pearson subsidise food and provide free hot drinks.
23. Assessment is satisfactory. Assessors maintain records for audit purposes and set targets for the next visit. The involvement of learners in the assessment process is passive and mostly unchallenging. Assessors plan different methods of assessment but these are often the same for each learner regardless of individual need. Some assessor judgements are not valid or sufficient.
24. Learners' programmes are insufficiently individually planned. Although individual learning plans are completed, they do not record achievement milestones and some learners do not fully understand them. Framework planning and achievement is recorded, although there is no learner involvement. Learners do not always know their grade for tests taken on induction and key skills.
25. Initial assessment for literacy and numeracy skills and short training needs analysis are carried out for each occupational area, although the latter does not accurately reflect the job role. The initial assessment is not conducted in sufficient detail to fully inform the employee of the requirements of the NVQ units. It does not encourage learners to make preferences for assessment methods or to choose units best suited to their job.

### **Leadership and management**

26. Leadership and management of the programme are good. Elmfield's appointment of a programme manager in January 2008 is beginning to have an impact on quality assurance and further enhance relationships between Pearson and Elmfield. For example, communication between staff from Elmfield and shift managers from Pearson at the distribution centre has recently improved.

27. Learners' understanding of equality of opportunity is satisfactory. Equal opportunity information is given during the apprentice induction and learners are asked after assessment if they have experienced any problems regarding equal opportunities and health and safety. There is good representation of employees by gender and ethnicity. Pearson offer staff not eligible for funding access to the programme. Learners' understanding of equal opportunities is satisfactory, although it focuses on their rights rather than their responsibilities.
28. Internal verification is satisfactory overall and is supported by relevant policies and procedures. Feedback to assessors picks up inconsistent assessment practice, although assessors are not always supplied with the correct resources to give correct evidence guidance on NVQ units. Elmfield have developed a detailed quality assurance procedure to ensure staff carry out observations of the learner experience.

## Customer service

### Good: Grade 2

#### Context

29. Of the 23 apprentices on customer service programmes, nine are female and 15 adult apprentices. All learners are employed at Pearson, and all but one work in the contact centres. All assessment and learning takes place in the workplace. The assessment is undertaken by one assessor who is appropriately qualified and experienced.

#### Strengths

- Excellent success rates in 2006/07
- Good acquisition of skills and knowledge
- Good support for learners
- Good management of the learning programme

#### Areas for improvement

- Insufficiently individualised learning programmes

#### Achievement and standards

30. Achievement and standards are outstanding. Success rates for the apprenticeship programme in 2006/07 were excellent at 87.5%. Progress for current learners is good. After two months on programme, most learners have met between 25-50% of their programme requirements. Retention of current learners is good. After two months, 23 of the 25 learners who started are still on programme. Key skills are achieved early in the programme, and sometimes at a higher level. Of learners currently on programme, five have achieved communications at Level 2, and nine have achieved application of number at Level 2.

31. Acquisition of skills and knowledge is good. Learners' customer service work is of a high standard. All learners have developed a good understanding of their job role. Many learners have further developed their job skills through working in different departments, and some have gained promotion. Learners gain confidence and become more motivated while on programme. For a few mature learners, this programme is their first formal qualification for many years and they are developing good learning skills.

#### Quality of provision

32. The quality of provision is good overall. Pearson provides effective training to meet the job requirements. Training in products and systems is closely monitored to ensure staff can meet the demands of their specific job roles. Most learners have attended specific job-related training which has developed their skills and understanding of customer service effectively, and almost all have been trained in Data Protection.

33. Support for learners is good. At the start of the programme, learners are given clear advice and guidance on the programme and its requirements. Team leaders provide good

coaching and support for learners through effective monthly one-to-one performance reviews. The assessor meets frequently with learners, usually every two weeks. At these meetings the assessor provides effective coaching and personal support which motivates the learners and moves them rapidly through their programme. Planning for these visits has improved, though on a few occasions learners have difficulty in being released from their work to meet the assessor. Team leaders work well with the assessor to monitor progress and action plan, however, they are not involved in the formal review of progress at the mid-point of the programme.

34. The working environment is pleasant and resources for the job role are good. Learners identified as having additional learning needs are effectively supported by the assessor and are given good learning support materials to help them achieve their key skills. An independent, confidential, helpline is available and used by learners for support with any personal or professional needs.
35. The range of provision to meet learners' needs and interests is satisfactory. Some learners are given the opportunity to achieve key skills at a higher level. Although all current learners are on a Level 2 programme, there are plans to broaden out the provision to offer the Level 3 apprenticeship programme and also a Team Leading qualification.
36. The learning programme is not individualised enough and the initial assessment process asks learners to self-assess against vocational criteria. However, this process is not effective in planning individual learning and learning plans are generally the same for all learners. They work towards the same NVQ optional units, which have been identified by the employer and training provider (following the pilot apprenticeship programme) and learners have no choice of optional units. The assessment strategy is too prescriptive and generally identical for all learners in terms of assessment methods and evidence collected. Learners' portfolios are satisfactory. Attendance at training sessions is dependent on the learners' work departments, rather than planned as a result of individual needs to develop their customer service skills.

### **Leadership and management**

37. Leadership and management is good. A thorough evaluation of the pilot programme was completed, which effectively identified the strengths and areas for improvement. This review involved managers, team leaders, learners and the training provider who have worked together effectively to improve the quality of service to learners. A steering group was formed to action plan for the current programme. Improvements have been introduced, although not all actions have been achieved, for example the proposed flexible approach to optional NVQ units. A formal service level agreement was introduced with the learning provider and a full-time assessor is now based in the workplace, as a visiting assessor had not been as sufficiently successful. Commitment to learning and development at Pearson is very good. Training and development needs are regularly reviewed. A new competencies framework has recently been introduced to assess staff against specific criteria for their job role. However, this has not yet been co-ordinated with the apprenticeship programme.
38. Quality improvement is good. Job performance of staff is regularly reviewed to ensure customer service standards are achieved. Action planning is effective in improving the quality of provision. The self-assessment process is inclusive and staff are actively

involved in quality improvement. The self-assessment report was accurate, well detailed and correctly identified the strengths of the provision. However, inspectors identified a different area for improvement and awarded a lower grade.

39. Learners have an adequate understanding of equality and diversity. It is effectively covered at induction, and there are clear policies and procedures. Learners' understanding is checked at the mid-programme review, though not always in sufficient detail to ensure understanding. There is a good ethos of equality within the organisation, which was demonstrated by the promotion of the programme to all staff including those ineligible for government funding. All staff at Elmfield, but not all team leaders, have attended recent training in equality and diversity.

## Annex

## Learners' achievements

Success rates on **work-based learning apprenticeship programmes** managed by Pearson PLC **2006 to 2007**

Programme	End Year	Success rate	No. of learners*	Provider/college NVQ rate**	National NVQ rate**	Provider/college framework rate**	National framework rate**
Apprenticeships	06-07	overall	14	97	N/a	97	N/a
		timely	14	93	N/a	93	N/a

**Note** 'At the time of the inspection - LSC data for 2006/07 had yet to be fully validated'

\* Learners who leave later than originally planned are counted in the year they actually leave. This group of learners are then added to the learners who planned to complete in a given year and did so or left earlier than planned

\*\* Provider and national qualification success rates are calculated using LSC published data derived from the Individual Learning Record