

# Exchange Group

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Inspection date

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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' monitoring 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:

- Preparation for work
- Business, administration and law

## Description of the provider

1. Exchange Group (EXG Ltd), formerly known as IE Training Centres, is based in Chiswick, West London. It has operated in its current structure since 2003. It has 29 centres located mostly in libraries in areas of social deprivation. Sixteen are in London, and the rest are in the North East, the West Midlands, East, South East and the West of England. All centres host learndirect courses, and about half also have Train to Gain learners, apprentices and adult apprentices in adult care, information communication technology (ICT), administration, team leading and customer service attached to them under contracts that started in 2006. EXG also has franchise contracts from South Thames, Redbridge and West Kent colleges, and provides information, advice and guidance through a nextstep contract, with recent Matrix accreditation. These contracts were not included in the inspection.
2. The company employs 170 people across England. Most centres employ two or three EXG staff. Three regional managers are responsible for the learndirect centres and another manager oversees work-based programmes. They report to the chief executive, as does the head of quality. A small employer engagement team is also based at the head office, as are the administrative functions of the company. During the inspection 1383 learners were enrolled on learndirect courses, 93 on directly contracted Train to Gain programmes and 119 on apprenticeships, 16 of whom were under 19 years old.

## Summary of grades awarded

Effectiveness of provision		Good: Grade 2
learnirect	Contributory grade: Good: Grade 2	
Work-based learning	Contributory grade: Satisfactory: Grade 3	
Train to Gain	Contributory grade: Satisfactory: Grade 3	
Capacity to improve		Good: Grade 2
Achievement and standards		Good: Grade 2
learnirect	Contributory grade: Good: Grade 2	
Work-based learning	Contributory grade: Satisfactory: Grade 3	
Train to Gain	Contributory grade: Satisfactory: Grade 3	
Quality of provision		Satisfactory: Grade 3
learnirect	Contributory grade: Satisfactory: Grade 3	
Work-based learning	Contributory grade: Satisfactory: Grade 3	
Train to Gain	Contributory grade: Satisfactory: Grade 3	
Leadership and management		Good: Grade 2
learnirect	Contributory grade: Good: Grade 2	
Work-based learning	Contributory grade: Satisfactory: Grade 3	
Train to Gain	Contributory grade: Satisfactory: Grade 3	
Equality of opportunity		Contributory grade: Satisfactory: Grade 3

## Sector subject areas

Preparation for work	Good: Grade 2
Business, administration and law	Satisfactory: Grade 3

## Overall judgement

### Effectiveness of provision

Good: Grade 2

learndirect

Contributory grade: Good: Grade 2

Work-based learning

Contributory grade: Satisfactory: Grade 3

Train to Gain

Contributory grade: Satisfactory: Grade 3

3. Overall effectiveness is good as is the capacity to improve. Learners' achievements and standards are good overall although satisfactory on work-based learning and Train to Gain programmes. The quality of provision is satisfactory. Leadership and management are good overall, but satisfactory for work-based learning and Train to Gain. EXG's arrangements for equality of opportunity are satisfactory. Provision in preparation for work is good and in business, administration and law it is satisfactory.

### Capacity to improve

Good: Grade 2

4. EXG has demonstrated good capacity to improve. Overall success rates on learndirect courses have risen steadily over the last three years and are now good. On ICT courses, the proportion of learners who do not complete the course within the expected time has reduced from 39% in 2006/07 to 18%, which is well below the national average. The company has developed a number of highly innovative ways to manage the dispersed provision. Three of its learndirect centres have been inspected. One identified area for development, the use of data, is now a strength. A custom-built database is used effectively to plan learning, co-ordinate training and monitor learners' progress. Recommendations from the accreditation of nextstep advisors have informed improvements on all programmes. Innovative web based interactive training for staff maintains their expertise efficiently and improves communication. Managers use feedback from staff and learners well to plan improvements. However, standards in literacy, numeracy and language vary widely between learndirect centres. The new work-based learning programme and Train to Gain programmes are satisfactory but systems have yet to become fully established.
5. The self-assessment process is inclusive, accurate and self-critical. Managers use a good range of evaluative strategies and audit processes to ensure thorough quality monitoring across all aspects of the provision. Action plans are effective and promptly implemented. Grades, strengths and areas for improvement identified by EXG closely match inspectors' findings. However, some key areas for improvement in work-based learning were missed.

## Key strengths

- High success rates on learndirect courses
- Highly responsive support for learners
- Good strategic management
- Highly effective team working
- Innovative use of technology to manage widely distributed provision
- Good partnership working to widen participation

## Key areas for improvement

- Slow progress on some skills for life courses and work-based programmes
- Insufficiently developed arrangements to support literacy, numeracy and language
- Insufficiently established systems to monitor some aspects of work-based learning programmes

## Main findings

### Achievement and standards

Good: Grade 2

learndirect	Contributory grade: Good: Grade 2
Work-based learning	Contributory grade: Satisfactory: Grade 3
Train to gain	Contributory grade: Satisfactory: Grade 3

6. Overall achievement and standards are good. learndirect overall success rates are high and rising. Withdrawal rates are very low. Many learners progress from skills for life courses into ICT programmes at levels 1 and 2. Train to Gain success rates on directly managed provision are satisfactory. It is too early to make a judgement on apprenticeship success rates.
7. All EXG's learners develop good vocational skills and improve their confidence and employability. However, too many learners exceed their planned end date on skills for life courses and in work-based learning. EXG has recognised this and strategies are in place for improvement.
8. On learndirect courses success rates for learners with Black or Black British heritage are lower than the average success rate for all learners. This is recognised in the self-assessment report. Large numbers of learners come from areas with a high deprivation index.

### Quality of provision

Satisfactory: Grade 3

learndirect	Contributory grade: Satisfactory: Grade 3
Work-based learning	Contributory grade: Satisfactory: Grade 3
Train to gain	Contributory grade: Satisfactory: Grade 3

9. The quality of provision is satisfactory. Teaching and learning are satisfactory. learndirect centres are welcoming and accessible. Most are well equipped with up to date information technology resources. Many make good use of a range of helpful additional resources to support learning. The centres often have quiet areas where staff coach learners and hold reviews. However, some centres are too cramped. Individual coaching is satisfactory for all learners. Long-term targets set for learners are clear and well defined, but short-term targets in both programmes are not specific enough. Planning for work-based learners is not sufficiently individualised.
10. Arrangements to support learners' literacy and numeracy needs are insufficiently developed. All learners are screened appropriately to measure their literacy and numeracy needs. However, arrangements to support them are not well developed, and although staff are working towards awards, not enough of them



have appropriate qualifications to support skills for life. Self-assessment has identified this and actions have already been taken to remedy it. These include the recent appointment of a skills for life co-ordinator.

11. Arrangements to meet learners' and employers' needs are good overall. learndirect centres have good links to high profile employers and organisations to assist learners in gaining employment. Learners receive good individual assistance on their courses and can access a wide range of additional help to improve their employability and boost their confidence. Employers of work-based learners are kept informed of progress but are not sufficiently involved in planning the programme.
12. Guidance and support for learners are good. Highly responsive staff in centres and in the workplace adapt their approaches flexibly to suit learners' particular needs. Learners can get help whenever they need it through a broad choice of communication methods. Remote learners are well supported and encouraged to drop into centres for individual coaching. Work-based assessors visit frequently. learndirect staff give very good support to help learners with personal problems to access a wide range of assistance.

## Leadership and management

Good: Grade 2

learndirect	Contributory grade: Good: Grade 2
Work-based learning	Contributory grade: Satisfactory: Grade 3
Train to Gain	Contributory grade: Satisfactory: Grade 3
Equality of opportunity	Contributory grade: Satisfactory: Grade 3

13. Strategic management is highly effective. EXG has a dynamic management team and a strategic business plan that aims to exploit every possible opportunity to promote learning. The board is fully involved with the company and supports it wholeheartedly. Staff are fully engaged in all aspects of the business planning process and senior managers strongly encourage staff participation in the future of the organisation. Following a restructure two years ago, managers have developed the work-based learning provision well in a short space of time. They have set up an employer engagement team and are training new assessors to support learners in the workplace. They have made useful contacts with a wide range of employers.
14. Communication and team working is highly effective across all centres and used well to support improvements in business performance. Purposeful monthly meetings between all centre managers explore issues thoroughly and share ideas productively. Centre managers cascade information effectively to staff. The weekly newsletter for all staff is informative and useful. Managers celebrate success with innovative incentives to encourage staff to develop their skills and improve organisational procedures. Good practice is captured and recorded well,

and is shared regularly at meetings and training events. Frequent visits from the training and development manager ensure centres are up to date with current procedures. Centre managers provide supportive mentoring and shadowing for staff. Managers conduct regular and systematic observations of training. Where issues are identified, managers record them on a highly effective central staff-training database and offer support and training. Work-based learning staff also meet and share experiences regularly at effective standardisation meetings.

15. Innovative use of technology allows the training and development manager to use an online, interactive programme to train staff remotely. Staff are involved throughout the training using a web cam and receive feedback immediately on the tasks they complete. EXG uses a very comprehensive custom-built database with an extensive range of useful features to monitor learners' progress on learndirect courses. Managers can plan learning effectively and early warning features have recently been introduced to accelerate learners' progress through their programme.
16. EXG works with a range of colleges and training providers to deliver training or to subcontract training. Currently, EXG has subcontracted training for thirty learners with additional learning needs to another training provider. However, current arrangements for the quality assurance of the training are insufficient.
17. Resources are satisfactory. learndirect centres are in good central locations and are mostly located in libraries. This provides a highly accessible and visible resource for local communities. However, some centres are overcrowded and have insufficient computers.
18. The work-based learning programme is new and systems are not yet fully established. Most staff joined very recently and some are inexperienced. Ambitious timescales were set for learners, so many appear to be making slow progress. Sales staff making initial contact with employers did not have sufficient understanding of the programmes, and a number of learners left work-based programmes very early. Although individual progress is recorded clearly in learners' files, centrally recorded information about learners' achievements lacks sufficient detail to enable managers to assess their progress effectively. Many of these issues have already been dealt with and learners who started more recently are progressing adequately.
19. Equality of opportunity is satisfactory. EXG uses a range of effective partnerships with a broad range of organisations and community groups well to widen participation in learning and develop learners' employability. The strong corporate commitment to equality of opportunity set out in EXG's comprehensive policy underpins everything it does. The company has an inclusive culture of openness and respect. Centres are located in safe and accessible premises, mostly libraries, in areas of high deprivation. Many centres have used good links to community organisations such as Sikh temples to attract new learners. The innovative 'Skill Bill' project promotes learning in these communities in an attractive and appealing way, with a website that celebrates the success of non-traditional learners. Most

learndirect learners are unemployed. EXG supports these learners well and provides good access to resources, and advice and guidance on employment. Many of EXG's other programmes develop the skills and employability of adults in sectors with low educational attainment. Several centres have commissioned productive workshops run by external organisations to develop learners' confidence and employability. Equality of opportunity is discussed at every monthly meeting and diversity data on learndirect programmes is used particularly effectively to monitor performance and plan improvements. All staff receive training in equality and diversity during induction, and their knowledge and understanding is checked regularly. Every learndirect centre has an equality champion. Arrangements to support learners with disabilities are good. Work-based learners are supported through a good range of approaches adapted to their needs. learndirect centres are accessible for those with limited mobility and offer a good range of adaptive technology for people with sensory or physical impairment. Learners who access centres remotely are also well supported. EXG listens to its learners and acts promptly on their views. Feedback is now collected from focus groups and questionnaires although it is too early to identify the impact on the provision. EXG has recently introduced the use of on-line questionnaires to gather further feedback from learners and analyse complaints. Arrangements to handle complaints and appeals are satisfactory.

20. Although work-based learners receive training on equality of opportunity during their induction, this is not developed sufficiently during the remainder of their programme. While the company complies with equality legislation, arrangements to safeguard vulnerable learners are not sufficiently thorough. Very few learners are under 19 years old. However, only 10 of 70 relevant staff currently have the appropriate vetting checks. Plans are in place for all staff to be checked early in 2009. Data on the performance of different groups of learners is available and analysed for learndirect courses. However, the analysis of the success rates for different groups of learners on Train to Gain and work-based learning programmes is insufficient.

## What learners like:

- Getting a qualification to help job prospects
- Using the brain
- 'My confidence has gone through the roof!'
- The welcoming atmosphere - 'Feels like a family'
- The freedom and the flexibility to work at your own pace
- Very well equipped learndirect centre
- 'It's brilliant! I'm really enjoying it. It's like I'm newborn!'
- Staff are very responsive and they know what they're talking about
- Lots of ways to contact staff and always get a quick response
- The programme is well organised to take account of work schedules
- 'Understanding my work and other people's better'

## What learners think could improve:

- Need a separate room for exams
- Some libraries have no toilets and there is nowhere to eat
- Too cramped - not enough room to take notes and can be noisy
- When it is crowded we have to wait too long for help
- Clarity of progress made and what we need to do to complete
- Help with spelling
- More help understanding what the units mean
- 'Sometimes tasks are too hard and I can't get the work done'

## Sector subject areas

### Preparation for work

Good: Grade 2

#### Context

21. A total of 29 learndirect centres in libraries provide skills for life and ICT courses, and some also provide employability training. During the inspection 823 learners were studying skills for life and 560 were on ICT courses. Most attend several times a week. Some remote learners also attend centres regularly. Centres promote courses through partners, word of mouth, direct marketing and through referrals from libraries and Jobcentre Plus.

#### Strengths

- High success rates on ICT courses
- Very low withdrawal rates
- High skills for life test pass rates
- Good links with a wide range of partners
- Good personal and employability support for learners
- Well managed provision
- Very good use of management information to plan improvements
- Well managed provision

#### Areas for improvement

- Some slow progress on skills for life courses
- Insufficient qualified staff to support skills for life learners
- Insufficiently specific session targets for learners

#### Achievement and standards

22. Achievement and standards are good. Success rates on ICT courses are high. Withdrawal rates for all learners are half the national average. Particularly effective action sharply reduced ICT timed out rates from 39% to 17%, well below the national average. The 94% pass rate for national literacy and numeracy tests and 85% first time pass rate are high. Overall skills for life success rates are satisfactory at 77%, just above the national average.

23. The standard of learners' work is satisfactory and appropriate to their level. Most complete supplementary tasks, develop confidence and improve their skills. Progression between courses and levels is satisfactory.

24. In a very few centres the proportion of skills for life learners exceeding their planned end date is very high although overall the timed out rate is around the

national average. The self-assessment report identified this and strategies to counteract slow progress are beginning to show results.

### Quality of provision

25. Teaching and learning are satisfactory. Centres are in libraries in good accessible locations. Working relationships between centre managers and library staff are good. Many centres benefit from good resources and books supplied by partners to help to develop learners' employability. The ratio of staff to learners is good. Staff have good expertise in ICT and many have participated in local and national projects to promote learning. Individual coaching is good. Reviews are satisfactory. They involve learners well in planning learning, and develop learners' understanding of health and safety and equality. Long-term goals on most learning plans engage learners and are well defined. Short-term targets, however, are not sufficiently specific or detailed to enable learners to understand how to work towards their learning goal. Targets are insufficiently individualised and not always appropriate. Some learners set their own goals by copying the titles of course sections without any involvement from the tutor. Sometimes tutors give insufficient feedback when learners complete their targets.
26. Insufficient staff have specialist qualifications in literacy and numeracy to support skills for life learners. Turnover of staff in centres has been high, and many new tutors are inexperienced and not fully qualified. Some centres cannot provide sufficient appropriate in-depth support to help learners with literacy or numeracy queries. EXG has recognised this and most staff are now progressing well towards an appropriate qualification.
27. Arrangements to meet learners' needs and interests are good. Centres are safe and welcoming, open throughout library hours including evenings and weekends, and are sited close to town centres. They provide a good range of specialist equipment where required. Many have good links with a wide range of partners, organisations and community groups. Effective involvement with local religious, educational, mental health and voluntary organisations has encouraged many non-traditional learners to participate in learning. Other partners include nextstep, employment agencies, jobcentres, and large national retail organisations that welcome job referrals. Remote learners are encouraged to attend the centre frequently for reviews or other support. Staff maintain contact effectively with the few who do not. They support learners effectively through a variety of flexible communication methods.
28. Support and guidance for learners are good. Effective initial guidance and diagnostic assessment ensure learners enrol on suitable courses. Learners receive detailed feedback on their results. Staff promote good relationships with learners in a friendly relaxed environment. Effective local initiatives include coffee mornings and evening sessions for parents with children. They frequently support learners with personal and social problems helping them to write letters or approach support agencies. Learners receive good support to help them to develop their employability skills. Very knowledgeable staff help with job

applications, curricula vitae and writing job references. Learners have good access to jobsearch websites and some centres provide weekly printouts of local vacancies or confidence-building workshops. Tutors work well with learners to improve their interview skills.

## Leadership and management

29. Leadership and management are good. Communication between managers and centre staff is open and honest. Centre managers know exactly what is required of them and receive very good support. Operations managers meet monthly to share and discuss good practice, and share it appropriately to centre staff. Managers work closely with the quality team to regularly review progress and set effective targets. Self-assessment is good. All centre staff are involved in and understand their centre's self-assessment. Overall reports are realistic and closely match inspectors' findings.
30. A comprehensive range of management information is used well. EXG's custom-built management information system is highly effective and accessible. Staff at the learning centres and head office can easily highlight learners at risk of making slow progress. They monitor performance weekly against targets across the provision and intervene promptly and effectively when necessary.
31. The arrangements for equality of opportunity are satisfactory. EXG uses suitable displays of information in centres to promote equality and diversity appropriately. Most learners have an adequate understanding of equality and diversity after induction. Centre managers analyse diversity data very well and use the results effectively to identify under-represented groups and plan successful approaches to increase participation.

## Business, administration and law

Satisfactory: Grade 3

### Context

32. EXG has 91 learners on administration 111 on learners customer service programmes and 49 are working towards team leader qualifications. Half are on Train to Gain programmes and half on apprenticeships. About a quarter of learners are male and 38% are from minority ethnic backgrounds. A dedicated sales team that contacts employers directly recruits learners. All are employed and learning in the workplace. Most are employed in London, the south east and Bristol, including in large public and private sector employers. Assessors visit to provide training and assessment.

### Strengths

- Good development of vocational, employability and personal skills
- Good resources for training
- Highly responsive approaches to support learners
- Particularly effective team working
- Good strategic planning and management

### Areas for improvement

- Slow progress for many learners
- Insufficient planning of learning
- Insufficient staff training to support development of learners' literacy, language and numeracy skills
- Insufficient reinforcement of equality of opportunity at work

### Achievement and standards

33. Achievement and standards are satisfactory. Development of job-related knowledge and personal skills is good. Learners greatly develop their knowledge of employment legislation and how their work contributes to the success of their employer. Learners improve their confidence, analytical skills, and self-esteem. Success rates are satisfactory. Of the 60 learners leaving Train to Gain programmes since January 2008, 63% achieved their qualification. It is too early to measure success for apprentices. The standard of learners' work is satisfactory.

34. Progress for many learners is slow. Approximately half of all learners who complete their qualification do so beyond their anticipated end date.



## Quality of provision

35. Teaching and learning are satisfactory. Effective individual coaching is provided in the workplace. Some very good resources are available on the shared intranet and assessors enhance them with individually tailored programmes for learners with particular needs and interests. Staff are knowledgeable and experienced and learners develop good vocational skills. Most learning is individual but some learners in large employers benefit from productive group sessions to cover technical topics.
36. Planning for learning is not sufficiently personalised. Short-term targets are sometimes insufficiently specific or time bound. Some learners are not aware of their progress and do not clearly understand what needs to be achieved by when. Employers are supportive and most are well informed about learners' progress. They receive regular feedback from assessors on the outcome of their visit and sign evidence statements for portfolios. However, they are insufficiently involved in planning learners' programmes. Some are unclear about what the learners need to do next. Too many performance observations are arranged without involvement from the employer and assessors miss potential opportunities for learners to demonstrate competence.
37. Arrangements to support development of literacy, numeracy and language skills are insufficiently developed. All learners sit appropriate diagnostic tests to identify literacy, numeracy or language needs but they do not always have opportunities to develop those skills. However, some learners supplement their programmes successfully through EXG learn2direct courses and some assessors give good guidance or use alternative assessment approaches to overcome learners' difficulties. Most staff have not received any formal training or development to recognise additional learning needs. However, EXG now has arrangements in place to develop assessors' skills.
38. The extent to which programmes meet the needs and interests of learners is satisfactory. A suitable range of programmes are offered to meet the needs of employers.
39. Support and guidance for learners are good. Support is highly responsive to learners' needs. Assessor visits to the workplace are both regular and frequent and in some cases as often as weekly. Assessors have small caseloads. They are highly empathetic to learners' individual needs and they spend considerable time and effort giving learners as much attention as they need. Assessors have devised alternative approaches to support learners with specific needs, for instance recording professional discussions with learners who find writing difficult, and using assistive technology with learners who have sensory impairments.

## Leadership and management

40. Leadership and management are satisfactory. Senior managers provide good strategic direction and their vision is shared across the organisation. Rapid expansion has been well managed. Recruitment and deployment of staff is effective. Team working is particularly effective and staff are well supported by managers. They have good access to personal and professional development. Regular one-to-one meetings with line managers are used very effectively to monitor performance. Inexperienced assessors are allocated mentors and experience an extended induction and probationary period that includes work shadowing. Bi-monthly standardisation meetings are effective. Internal verifiers monitor assessment practice frequently and give feedback, which is both positive and developmental. An informative weekly newsletter promotes good practice. However, the management information system is not yet fully developed to allow managers to have a clear understanding of the progress of groups of learners.
41. The self-assessment process is inclusive and involves all staff. Many issues raised by inspectors had already been recognised and addressed.
42. The arrangements for equality and diversity are satisfactory. Learners and staff are treated fairly and with respect. Learners produce evidence of their understanding of equality and diversity through written assignments. However, opportunities to discuss topical issues and relate theory to practice during assessor visits are rarely exploited. Where questions are asked they are generally about policy or at a low level. Commitment to equality of opportunity is not an integral part of the agreement with employers.

## Annex

## Learners' achievements

There is insufficient data to publish tables on work-based learning and Train to Gain achievements

Outcomes on learndirect programmes, 2006 to December 2008

Learning type	Year	Enrolments	Counted for data	Success rate (%)	Withdrawal rate (%)
All sectors	2006/07	18128	16192	72	3.7
	2007/08	22679	21618	75.2	3.6
	2008/09*	6595	6120	77.3	1.2
ICT	2006/07	3114	2693	52.81	7.99
	2007/08	4045	3651	79	7
	2008/09*	1164	1057	81	2
skills for life	2006/07	14991	13495	76.35	3
	2007/08	18529	17933	74	3
	2008/09*	5404	5030	77	1

Note: 2008/09\* data is 'part year' only and is representative of three months of the UFI Sheffield contract year

## learndirect equality and diversity data

2007/08	All Ethnic Groups	Asian or Asian British	Black or Black British	Chinese/ Other	Mixed	Not Known	White	White other
Enrolments	23,131	2,368	4,253	1072	979	285	10316	3450
Completion rate (%)	97	97.1	97.4	97.4	96.6	96.0	99.7	96.9
Achievement rate (%)	76	71.6	68.9	76.4	75.0	75.7	82.3	78.3
Success rate (%)	75	72.5	69.7	76.1	73.3	72.8	79.9	77.1
Withdrawal rate (%)	4	3	2.7	2.5	3.5	4.0	4.3	3.1