

# INSPECTION REPORT

## **Bellis Training and Assessment Centre**

03 July 2001



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 in New Deal options. The same scale is used to describe the quality of leadership and management, which includes quality assurance and equality of opportunity. The descriptors for the five grades are:

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

The two grading scales relate to each other as follows:

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

## **Adult Learning Inspectorate**

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

- work-based training for all people over 16
- provision in further education colleges for people aged 19 and over
- the University for Industry's *learnirect* provision
- adult and community learning
- training given by the Employment Service under the New Deals.

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

## **Inadequate provision**

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

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

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

## SUMMARY

### The provider

Bellis Training and Assessment Centre is a small privately owned training organisation based in Birmingham city centre. There are 47 young people in training, 41 of them in areas which were inspected. Bellis Training and Assessment Centre provides training for young people in the retailing, customer service, distribution, warehousing and hospitality occupational areas. Some of the learners are working towards foundation and advanced modern apprenticeships and NVQs. There are also New Deal clients on the voluntary sector and employment options receiving retailing, distribution and warehousing training. Retailing and customer service was the only occupational area with enough learners to be inspected.

### Overall judgement

The quality of the provision is adequate to meet the reasonable needs of those receiving it. The quality of work-based learning and New Deal training in retailing and customer service is good. The leadership and management of the training are satisfactory.

### Work-based learning for young people

Bellis Training and Assessment Centre trains 30 young people on modern apprenticeship programmes and other NVQ training. Learners are either employed or on work placements in hotels, shops or businesses locally. There are good work placements. Many learners' supervisors act as their mentors. Bellis Training and Assessment Centre organises exceptionally good vocational training to suit each learner. Learners are taught in small groups or individually at the training centre or at work. Training in key skills is an integral part of the vocational training.

### New Deal

Bellis Training and Assessment Centre has 11 New Deal clients who are on either the voluntary sector or employment options. Their training programme lasts for 26 weeks and they undertake three NVQ units. A co-ordinator, who also acts as an assessor, prepares clients well for assessment. Clients receive effective support and many of them either gain employment or both find work and achieve the goals on their individual learning plans.

### Leadership and management

Bellis Training and Assessment Centre's leadership and management are satisfactory. It has clear strategic objectives which are shared by all the staff. It has deliberately

remained small to focus on giving a highly personal service to learners. Staff are well informed about external developments and respond quickly to meet new challenges. Staff development activities are closely linked to business objectives. A good annual staff appraisal system is followed up well with individual development plans for staff. Work-placement supervisors are fully involved in the training and assessment of learners. Equal opportunities training is undertaken during induction and effective training sessions are conducted for learners throughout their programmes. The self-assessment report did not contain enough evaluative judgements. Analysis of retention and achievement using management information is poor and there is little use of targets to bring about improvement. Equal opportunities is insufficiently monitored in work placements.

## GRADES

<b>Retailing, customer service &amp; transportation</b>	<b>2</b>
Contributory grades:	
Work-based learning for young people	2
New Deal	2

<b>Leadership and management</b>	<b>3</b>
Contributory grades:	
Equality of opportunity	3
Quality assurance	3

## KEY STRENGTHS

- exceptionally good vocational training
- good key skills training
- good work placements
- clear aims and strategy
- effective staff development
- good equal opportunities training for trainees

## KEY WEAKNESSES

- poor progress review system
- inadequate use of management information
- insufficient monitoring of equal opportunities in work placements
- insufficient use of standards or targets for improvement

## THE PROVIDER AND ITS CONTEXT

1. Bellis Training and Assessment Centre (BTA) was formed in 1984 to provide training for young people in the Birmingham area. It has two offices and a general purpose training room in central Birmingham. There are six members of staff. BTA also uses three consultants for specialist roles in statistical management, internal verification and co-ordination of New Deal Clients. Training and assessment is provided in retailing, customer service, distribution, warehousing and hospitality. Currently there are 47 learners including New Deal clients and trainees on modern apprenticeships and national vocational qualification (NVO) training. They are employed on work placements in hotels, shops and businesses locally. The New Deal clients are on the employment or voluntary sector options in retailing, customer service, warehousing and distribution. Training takes place on the job and in training sessions provided at BTA's training centre. Learners are taught individually or in small groups. Most of them are receiving help for additional social and learning needs.

2. Work-based learning is funded through a contract with the Birmingham and Solihull Learning and Skills Council (LSC). New Deal training is funded through a contract with the Heartlands district office of the Employment Service. Birmingham has a growing economy, which is moving from manufacturing to service sector employment. There is particular growth in the retailing, hospitality, tourism and leisure sectors. In June 2001, unemployment in Birmingham was 5.7 per cent, compared with 3 per cent nationally. Birmingham has substantial minority ethnic communities, which account for 21.5 per cent of its population, in comparison with the national average of 6.2 per cent. In September 2000, the proportion of school leavers in Birmingham achieving five or more general certificates of secondary education (GCSEs) at grade C and above was 40.8 per cent compared with the national average of 49.2 per cent.

## THE INSPECTION

3. A team of three inspectors spent a total of 12 days with BTA in July 2001. They interviewed 19 trainees and eight workplace supervisors, managers and employers. Inspectors conducted 14 interviews with staff from BTA and also interviewed their external consultants. Two training sessions were observed during the inspection. Inspectors examined a range of documents including 29 trainees' files and nine portfolios of evidence. They looked at policies, procedures, assessment and internal verification records and reports from the awarding body. They also studied BTA's self-assessment report, which had been updated in June 2001.

Grades awarded to learning sessions

	Grade 1	Grade 2	Grade 3	Grade 4	Grade 5	Grade 6	Grade 7	Total
Retailing, customer service & transportation	0	2	0	0	0	0	0	2
<b>Total</b>	<b>0</b>	<b>2</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>2</b>

## OCCUPATIONAL AREAS

### Retailing, customer service & transportation

Grade 2

Programmes inspected	Number of learners	Contributory grade
Work-based learning for young people	30	2
New Deal	11	2

4. There are 41 learners on retailing and customer service training. Four are advanced modern apprentices, 12 are foundation modern apprentices and 14 are on work-based training programmes for young people. There are 11 New Deal clients, each working towards units of level 2 NVQs in retailing, distribution and warehousing. Most are on the voluntary sector option and one is in subsidised employment. All advanced modern apprentices are employed and working towards NVQs in customer service at level 3 and key skills at levels 2 and 3. Foundation modern apprentices and those receiving other work-based training for young people are in work placements or are employed. Learners are recruited throughout the year through the careers service, their employer or by personal recommendation. Individual interviews, initial assessment and induction take place either at BTA's training centre or the trainees workplaces. Vocational, key skills and personal development training is provided at BTA one morning each week or by arrangement at learners' workplace. Learners gather evidence for their NVQs from their everyday work. NVQ assessment is also carried out at their workplace. BTA's assessors visit learners at work between once a week and once every four weeks to assess their skills and review their progress. Learners work locally in hotels, shops and businesses.

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

New Deal										
New Deal (18-24)	1997-98		1998-99		1999-2000		2000-01		2001-02	
	No.	%	No.	%	No.	%	No.	%	No.	%
	Number that started			3		28		43		0
Still in training			0	0	0	0	11	26	0	0
Gained job and/or planned learning completed			3	100	8	29	10	23	0	0
Gained job			3	100	14	50	11	26	0	0
Planned learning completed			3	100	17	61	18	42	0	0

Work-based learning for young people										
Foundation modern apprenticeships (FMA)	1997-98		1998-99		1999-2000		2000-01		2001-02	
	No.	%	No.	%	No.	%	No.	%	No.	%
	Number that started			16		20		28		0
Still in training			13	81	11	55	12	43	0	0
FMA framework completed			0	0	1	5	11	39	0	0
NVQ level 2 completed			7	44	5	25	8	29	0	0

Work-based learning for young people										
Advanced modern apprenticeships (AMA)	1997-98		1998-99		1999-2000		2000-01		2001-02	
	No.	%	No.	%	No.	%	No.	%	No.	%
	Number that started					5		13		0
Still in training					3	60	4	31	0	0
AMA framework completed					0	0	1	8	0	0
NVQ level 2 completed					2	40	8	62	0	0
NVQ level 3 completed					0	0	1	8	0	0

NVQ Training										
NVQ Training	1997-98		1998-99		1999-2000		2000-01		2001-02	
	No.	%	No.	%	No.	%	No.	%	No.	%
	Number that started					33		41		0
Still in training					14	42	14	34	0	0
Individual learning plan completed					11	33	5	12	0	0
Left without completing individual learning plan					8	24	17	41	0	0
NVQ level 1 completed					1	3	0	0	0	0
NVQ level 2 completed					9	27	5	12	0	0
NVQ level 3 completed					2	6	0	0	0	0

## STRENGTHS

- exceptionally good vocational training
- good key skills training
- good work placements
- good achievements for New Deal clients

## **WEAKNESSES**

- poor progress review system

## **OTHER IMPROVEMENTS NEEDED**

- clearer arrangements with external agencies for New Deal training and assessment

5. BTA trains learners in small groups at its training centre each week. Its training room is suitably equipped. Tutors are highly qualified and communicate effectively with learners. Training is carefully planned. Individual training sessions are designed to meet the needs of those attending. These are adapted from a thorough plan for the training in this occupational area. Learners are confident and enthusiastic and there are lively discussions. Some learners receive relevant practical off-the-job training individually. One learner who needs extra basic skills help began a numeracy coaching session with practical exercises counting change. BTA relates her basic skills training to her everyday work, as she works in a shop. Learners who are unable to attend group training sessions at the training centre are given good distance-learning material and individual tuition at other times. BTA organised off-the-job training for New Deal clients but the clients did not attend. BTA's co-ordinator advises supervisors of New Deal clients on the content of off-the-job training required for clients to achieve their qualifications. This is in addition to BTA's contractual requirements. The initial interview procedures are comprehensive and fair. They test the applicants' abilities in mathematics and communication skills to find out if they have additional support needs. Learners value the careful way in which BTA makes sure they are on the right programme.

6. Learners are given well-planned work projects which include work that will develop their key skills from the start of their training. This is identified as a strength in the self-assessment report. A customer service learner has begun her level 3 NVQ by collecting customer feedback surveys distributed by her employers. She intends to analyse them to improve her application of number key skill. All learners are encouraged to improve their key skills regardless of whether they are essential in the qualifications they are undertaking. Training in key skills is an integral part of the vocational training. Learners increase their motivation and confidence at the same time as improving communication skills.

7. BTA chooses work placements very carefully. Learners have good opportunities to collect evidence for their NVQs. All work-placement providers are required to give relevant on-the-job training. They have good resources and often allow learners to participate in company training courses. Learners are given appropriate tasks to extend their skills and knowledge. There is good communication between BTA's staff and supervisors and managers in work placements. A comprehensive booklet is given to work-placement providers about training, which outlines their responsibilities. Vocationally skilled and well-informed mentors are allocated to learners in the

workplace. In some cases, this is a member of staff who has already completed the same qualification. In others, the mentor is the learner's employer, manager or supervisor. Mentors are proposed by BTA's staff and agreed with the learner's employer. Four mentors are working towards assessors' and learners' awards. Mentors provide useful witness testimony of the skills learners demonstrate in the workplace.

8. Assessors make frequent visits to the learners. Learners begin to collect evidence for their portfolios from the start of their training. There are careful reviews of their progress involving discussion between the trainee, assessor and mentor. Learners highly value the advice and guidance all staff give them. Whenever a learner does something that could be used as evidence for their qualification, they or their supervisor records it at the time. At the progress reviews, everyone concerned agrees clear targets to be achieved before the next visit. Learners are very familiar with the structure of their training and the progress they have made. Assessors are well qualified and keep up to date in their occupational area. Internal verification is carried out during the training programme and at the end. It is thorough and ensures that portfolios are of consistent quality. The achievements of New Deal clients are very good. During 2000-01, 66 per cent of clients leaving BTA's New Deal options either gained a job or found work and successfully completed their individual learning plans. Retention is high on New Deal programmes. During 2000-01, less than 10 per cent of New Deal clients left without either gaining employment or completing their individual learning plan. On BTA's other training programmes, where there are more learners' retention is not as good.

9. Reviews of learners' progress are not conducted consistently. Records sometimes focus entirely on the achievement of qualifications and do not contain enough detail about other aspects of learners' progress. They are completed every time an assessor visits the workplace and usually follow learners' assessments. Separate action plans completed at the same time clearly state what the learner should do next to achieve the qualification. Occasionally progress review documents for New Deal clients only show comments on pastoral matters. The back of the review sheet often has lengthy descriptions, although the form itself contains minimal information. The information on the forms is often basic and repetitive. Learners and work-placement providers are rarely provided with a copy of learners' review forms. Learners and work-placement providers do not have a copy of the individual learning plan to refer to. Review documents are different for the different training programmes and are often incomplete. BTA recognised the lack of common practice between New Deal and other training in its self-assessment report.

10. BTA is contracted to assess New Deal clients. The contractual arrangements for BTA's assessment of New Deal clients are confusing to both the assessors and the clients. Although BTA is only required to assess clients, in fact it often does more. BTA's New Deal co-ordinator acts as the assessor and spends time training clients in preparation for assessment. The assessor has also spent time counselling clients, which is more than she is supposed to do. BTA is not responsible for finding or monitoring work placements for the clients. Problems have arisen within work placements which have delayed the progress of clients. Clients have little contact with their New Deal

personal advisers assigned by the Employment Service.

#### Good Practice

*BTA helps trainees to adopt a positive mental attitude to their training. Learners gain the confidence to identify their own shortcomings. One Learner knew that he often forgot to take the name of telephone callers and asked his colleagues to remind him whenever possible. His workplace supervisor had not noticed his mistakes and was pleased to help the learner to overcome his problem.*

**LEADERSHIP AND MANAGEMENT****Grade 3**

11. The owner of BTA is also the senior manager. A total of six staff are employed by BTA including, a deputy centre manager and a training manager. Training is organised by three training co-ordinators, with responsibility for organising training programmes. There is also a full-time administrator. All the employees also act as NVQ assessors. Three consultants are contracted to carry out statistical management, internal verification and co-ordination of New Deal clients. BTA has a range of policies and procedures including an equal opportunities policy. It has no formal quality assurance policy. It has produced three annual self-assessment reports. An update to the most recent report was prepared in June 2001.

**STRENGTHS**

- clear aims and strategy
- effective staff development
- effective involvement of work-placement supervisors
- good equal opportunities training for learners

**WEAKNESSES**

- inadequate use of management information
- insufficient monitoring of equal opportunities in work placements
- insufficient use of standards or targets for improvement
- inadequate self-assessment report

**OTHER IMPROVEMENTS NEEDED**

- better record-keeping of team meetings
- clearer New Deal contract
- further promotion of training to under-represented groups
- better use of questionnaires to gain feedback

12. BTA has clear aims and strategic priorities. It has deliberately limited the size of its operation to enable it to provide intensive support to individual learners. Strong leadership is provided to ensure that the quality of learners' experience is its most important priority. Staff have a good understanding of BTA's aims. They have worked together to develop appropriate training. There is good communication within the company and with work-placement providers. Regular team meetings are well attended by staff. Minutes of these meetings are given to all staff and confirm that a wide range of subjects is discussed in detail. Staff raise matters freely at these meetings but there are no formal agendas. Matters arising from the previous meeting and action decided on as a result of the discussions are not recorded.

13. The system for managing work placements is thorough. BTA carries out well-planned visits to potential work-placement providers to consider health and safety matters and a variety of other key factors related to training. Strengths and weaknesses are identified and shared with the potential work-placement provider. Where significant problems are found, the employer is provided with a list of improvements which must be completed before any learners are placed there. Checks are made to make sure learners are able to cover the range of activities they will need to collect evidence for the NVOs. Feedback from work-placement providers indicates that they consider their links with BTA to be very good. BTA has taken several initiatives to improve communications further. It distributes a helpful guide on work-based learning and a regular newsletter about its work and successes. Some supervisors who act as mentors to learners in the workplace have gained a mentoring qualification. Supervisors who are qualified assessors are encouraged to obtain a mentoring qualification too.

14. BTA uses its management information poorly to analyse retention and achievement. BTA has developed its own management information system. It provides staff with accurate and up-to-date information about the progress of individual learners and information for data returns to external funding bodies. However, insufficient reports are produced on retention and achievement. Managers do not analyse the information. They have to identify levels of retention or achievement or trends over time. BTA keeps records of early leavers and is aware of why learners leave.

15. A consultant is responsible for managing the New Deal programme. The contract for this work is confusing and does not clearly outline who is responsible for aspects of the training. Informal meetings between the senior manager and the consultant identify problems and help to keep all staff informed. As identified in the self-assessment report the running of BTA's New Deal training is not yet sufficiently integrated with the rest of its work-based training.

**Equality of opportunity****Contributory grade 3**

16. BTA has a satisfactory policy and methods for raising awareness of equal opportunities. The policy is a clear, easily understood statement outlining BTA's commitment to equality of opportunity. There are no procedures for monitoring this policy. There are grievance and appeals procedures. BTA has taken specialist advice and reviewed its disability policy in view of this. Staff receive good training on disability awareness. Learners are questioned on their attitude to equal opportunities on the application form for retailing and customer service training. Potential work-placement providers' equal opportunities policies are checked but there is insufficient monitoring of these policies once trainees are placed. BTA's training co-ordinators do not always keep copies of these equal opportunities policies.

17. Learners have a good awareness of equal opportunities. Their induction covers all aspects of equality of opportunity. It is not a standard requirement to cover equal opportunities at learners' progress reviews. All learners interviewed understood the appeals procedure and knew who to talk to if problems arose with their work placements. Learners describe how effectively reviewers have mediated on their behalf when problems have arisen. Learners receive training to raise awareness of equal opportunities twice a year. This is linked to their key skills in communications training. The detailed lesson plan for one of these training sessions shows how learners' understanding of different types of behaviour will be developed. The plan includes a discussion of equal opportunities and a questionnaire to check the learners' level of understanding. Another lesson observed during the inspection covered equal opportunities well with lively discussion and good written materials for learners.

18. BTA has analysed the numbers of minority ethnic learners over the last three years. In 2000-01, 42 per cent of learners who started were from minority ethnic groups, compared with 21.5 per cent of the population of Birmingham as a whole. BTA has identified schools in areas with a high proportion of minority ethnic pupils. BTA's training co-ordinators have visited schools with a high proportion of pupils from minority ethnic groups to promote their training to those who were about to leave school. However BTA's promotional materials do not contain images to give the impression that their training is available to everyone. BTA's training centre has a car-parking space near the entrance which can be used by arrangement for people with restricted mobility. There is also an access to the first floor offices and training room by arrangement.

**Quality assurance**

**Contributory grade 3**

19. BTA considers quality assurance matters to be important and has a comprehensive quality assurance manual. This contains a wide range of standard documents and procedures. These are understood well by staff and carried out consistently. The senior manager checks that key procedures are carried out as intended. For example a proportion of learners' files is regularly selected and checked to make sure their contents reflect agreed procedures. Team meetings regularly consider learners' feedback, and the extent to which work placements are meeting learners' needs. There is regular and effective assessment, which takes place mainly at learners' workplaces. Internal verification is thorough and is carried out both during training and once learners have had their final assessments.

20. Staff are well qualified and effectively used. They have clear job descriptions. They participate in a wide range of staff development activities. These are closely related to BTA's business objectives. Staff frequently attend briefings organised by the local LSC and other bodies about new developments relevant to training. There is a good staff appraisal system. Each year all staff have a thorough appraisal of their performance in relation to their job description and agreed priorities. They each have an individual staff development plan for the subsequent year.

21. There is little use of targets to bring about improvement. Clear performance indicators for the quality of training have not been identified. For example, while there is a standard document for learners' reviews, there are no standards for how well it should be used, or what proportion of progress reviews should be meeting the standard.

22. The self-assessment process is not used effectively to improve the quality of BTA's activities. Staff are involved in producing the section of the self-assessment report relating to their work, but many of their judgements are not sufficiently evaluative. The judgements concentrate too heavily on BTA's actions rather than the impact of those actions on the experience of learners. Other observations in the report refer to external factors over which BTA has little control. The self-assessment report did not identify many of the strengths or weaknesses which inspectors found. BTA does not make enough use of data on retention and achievement or the results of evaluation questionnaires in compiling the report. Detailed action plans are drawn up to deal with any weaknesses identified. Effective action is taken to rectify many of them.

23. BTA obtains feedback from learners in several ways. Assessors have developed close working relationships with learners and visit them frequently to discuss all aspects of their experience. Learners are given evaluation questionnaires at three stages of their training. The outcomes of questionnaires are carefully analysed. They indicate a very high level of satisfaction with most aspects of training. A substantial number of learners' responses to questionnaires also include unsolicited praise of BTA for the quality of their experience. However, many learners do not return some of these questionnaires. BTA is aware of this problem and is amending the design of the questionnaires in an attempt to improve the response rate.

### Good Practice

*The training administrator who has daily contact with learners and two training co-ordinators attended a half-day workshop on disability awareness, run by a specialist local company. The company devised an action plan for BTA, which has helped it to improve its services to learners with disabilities. The training is also useful as learners who work in retailing are likely to deal with members of the public who have disabilities. Bellis has used the company to check the wording of its policies and amended them in light of the advice.*