

INSPECTION REPORT

Oldham Engineering Group Training Association Ltd

07 January 2003



ADULT LEARNING
INSPECTORATE

Grading

Inspectors use a seven-point scale to summarise their judgements about the quality of learning sessions. The descriptors for the seven grades are:

- *grade 1 - excellent*
- *grade 2 - very good*
- *grade 3 - good*
- *grade 4 - satisfactory*
- *grade 5 - unsatisfactory*
- *grade 6 - poor*
- *grade 7 - very poor.*

Inspectors use a five-point scale to summarise their judgements about the quality of provision in occupational/curriculum areas and Jobcentre Plus programmes. The same scale is used to describe the quality of leadership and management, which includes quality assurance and equality of opportunity. The descriptors for the five grades are:

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

The two grading scales relate to each other as follows:

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

Adult Learning Inspectorate

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

- work-based training for all people over 16
- provision in further education colleges for people aged 19 and over
- **learndirect** provision
- Adult and Community Learning
- training funded by Jobcentre Plus
- education and training in prisons, at the invitation of Her Majesty's Chief Inspector of Prisons.

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

Overall judgement

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

Provision will normally be deemed to be inadequate where:

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

This provision will be subject to a full reinspection.

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

SUMMARY

The provider

Oldham Engineering Group Training Association Ltd is a limited company by guarantee and is a registered charity which operates under the trading name of OTC. It is a member-owned organisation with 102 members paying an annual subscription. Its head office and training centre is located in Oldham. OTC provides work-based learning in engineering, business administration, distribution and warehousing and customer service. A wholly owned subsidiary company, OTC Consultancy Limited, was set up in 1996 to provide health, safety and environmental support to companies. This was not within the scope of the inspection.

Overall judgement

The quality of the provision is adequate to meet the reasonable needs of those receiving it. Training in engineering and business administration is satisfactory. However, the training in distribution and warehousing and customer service is unsatisfactory. The leadership and management are satisfactory, as is equality of opportunity. Quality assurance is unsatisfactory.

GRADES

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

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

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

Retailing, customer service & transportation	4
Contributory grades:	
Work-based learning for young people	4

KEY STRENGTHS

- good internal communications
- good links with external organisations
- clear strategy for promoting equal opportunities
- good learner support
- good emerging strategies for the integration of key skills with vocational training

KEY WEAKNESSES

- insufficient targets for the organisation
- insufficient reinforcement of equal opportunities in the workplace
- incomplete quality assurance arrangements
- poor completion rates of the modern apprenticeship framework
- inadequate strategy for the identification and support of literacy and numeracy needs

OTHER IMPROVEMENTS NEEDED

- better understanding of training programmes by employers

THE INSPECTION

1. A team of six inspectors spent a total of 24 days at Oldham Engineering Group Training Association Ltd (OTC) in January 2003. They visited 31 workplaces and interviewed 80 learners and 35 workplace supervisors. In addition, they carried out 52 interviews with OTC's staff. Inspectors observed assessments and four progress reviews and observed and graded seven learning sessions. A range of documents was examined, including 22 learners' portfolios, 39 individual learning plans, learners' records, review documents, assessment records, external verifiers' reports, minutes of meetings, business plans, policies and procedures.

Grades awarded to learning sessions

	Grade 1	Grade 2	Grade 3	Grade 4	Grade 5	Grade 6	Grade 7	Total
Engineering, technology & manufacturing	0	0	2	3	1	0	0	6
Business administration, management & professional	0	1	0	0	0	0	0	1
Total	0	1	2	3	1	0	0	7

THE PROVIDER AS A WHOLE

Context

2. OTC was established in 1966 as an engineering group training scheme. It became a limited company by guarantee in 1970 and is a registered charity. As a member company organisation, it currently has 102 companies in membership. OTC's members are small, medium-sized and large companies in the Oldham metropolitan borough and the Tameside area of Greater Manchester. The company operates from one site in Oldham. It subcontracts three trainers from a local teaching centre and one freelance workplace assessor. Some elements of the modern apprenticeships are subcontracted to local colleges. OTC contracts with Greater Manchester Learning and Skills Council (LSC). The training aims to serve the needs of the 102 member companies. Most of the training is carried out on the job, with OTC trainer/assessors giving vocational and pastoral support in the workplace. Learners attend the training centre at OTC's offices either full time, on block release or day release. For distribution and warehousing and customer service, learners attend the training centre when a need is determined. OTC employs 26 staff, of whom 21 are full time and five part time. It has a chief executive, an engineering training manager, a senior training adviser responsible for business administration, distribution and warehousing and customer service, a health, safety and environment senior adviser, and an office manager who is also the quality assurance co-ordinator. OTC currently has 145 learners, all of whom are employed. There are 31 foundation modern apprentices, 100 advanced modern apprentices and 14 learners working towards national vocational qualifications (NVQs).

3. In May 2002, unemployment in Oldham was 4.1 per cent, compared with 3.6 per cent in the Northwest and 3 per cent nationally. The largest employment sector in Oldham is in the service industries, which accounts for 60 per cent of those in work. Manufacturing and engineering remain strong in the area with 40 per cent of employees working in production and construction sectors. The 1991 census shows that in Oldham, 8.7 per cent of the population is from minority ethnic groups, compared with 6.2 per cent nationally. In October 2001, the proportion of school leavers in Oldham achieving five or more general certificates of secondary education (GCSEs) at grade C or above was 41 per cent, compared with 46 per cent in the Northwest and 48 per cent nationally.

Work-based learning for young people

4. OTC offers training in engineering, business administration, distribution and warehousing and customer service. In engineering there are 95 learners, of whom 75 are advanced modern apprentices and 11 are foundation modern apprentices. There are also nine learners following NVQ programmes. OTC offers the technical certificate in engineering programmes, although some aspects are subcontracted to the local college. In business administration there are 40 learners, of whom 22 are advanced modern apprentices and 14 are foundation modern apprentices. There are four learners on NVQ training. In distribution and warehousing, there are three advanced modern apprentices and six foundation modern apprentices and one learner on an NVQ training programme. Of these, seven are in distribution and warehousing and three are in customer service. In engineering, resources for on-the-job training are good with effective training in the workplace. In business administration programmes, learners have access to a good range of additional learning opportunities. Learners in distribution and warehousing and customer service have access to a varied range of relevant training.

5. Achievement rates are poor in all programmes, although OTC has identified and implemented a strategy which is now having a positive effect in the engineering and business administration programmes. This has been achieved by better implementation and integration of key skills and is led by a key skills development team. In engineering, for the six-year period to 2001-02, there has been a total of 354 learners, of whom 79 are still in learning. Of the 275 who have left, only 96 completed the framework, giving an achievement rate of 35 per cent. For 2002-03, 27 of the 29 learners are still in learning. Recent staffing changes, the introduction of a retention officer and a more structured approach to key skills has resulted in learners now making good progress in all areas of their programme. An effective monitoring system is used to monitor progress. In business administration, for the four-year period since 1998-99, there have been 111 learners, 29 of whom are still in learning. Of the 82 leavers, only nine completed the framework, giving an achievement rate of 11 per cent. In business administration, learners are involved in a wide range of key skills projects and good use is made of short- and long-term target-setting. With the key skills and retention strategies, the learners' progress is improving significantly. Six learners have completed the full framework in the past month. Others have completed but are awaiting their certificates. Current learners are making better progress, which is evident from the number of NVQ units being achieved in a shorter period of time, and the number of learners actively engaged in pursuing the key skills. In distribution and warehousing and customer service, for the two-year period since 2000-01 there have been 11 learners, with six still in learning. Of the five who have left, three have completed the framework. In all programmes, progress review periods have been reduced from 12 to eight weeks as part of the strategy to improve retention and achievement rates. In distribution and warehousing and customer service programmes, the key skills strategy has been poorly implemented and the internal verification process is weak. Retention rates for advanced modern apprentices are improving in engineering, rising from 38 per cent in 1999-2000 to 67 per cent in 2001-02, with 22 learners still in learning. In the current year, all learners have been retained. Retention rates in business administration, distribution and warehousing and customer

OLDHAM ENGINEERING GROUP TRAINING ASSOCIATION LTD

service are satisfactory and improving.

LEADERSHIP AND MANAGEMENT

Grade 3

6. OTC is led by a chief executive, who is also the company secretary. He reports to a board of eight directors, who are elected by the member companies, and who meet every two months. Most of the directors are directors of member companies. There are 26 staff at OTC, of whom 21 are full time and five are part time. OTC employs an accountant for approximately three days a month. The senior management team consists of the chief executive and two departmental heads. This team meets each week to discuss business and training. The team formally minutes meetings once a month. The two departmental heads are the engineering manager and the senior training adviser. The engineering manager manages six staff, including four instructors and two training advisers. In addition, there is one freelance assessor and three part-time trainers subcontracted from a local teaching centre. The senior training adviser manages three training advisers for business administration, one information technology (IT) training adviser and one distribution and warehousing training adviser. In addition, she line manages the office manager. There are monthly departmental meetings, chaired by each head of department and attended by all departmental staff. There is also a quarterly staff meeting attended by all members of staff. The provider also employs a school liaison officer. There are three staff involved in marketing and business development. The health, safety and environment team consists of the senior adviser, an adviser and a client manager. These staff are involved with work-based learning and the commercial consultancy subsidiary. There is a newly developed key skills team which consists of a representative from each training team. The company has an equal opportunities policy which contains a simple set of procedures to be followed for harassment, bullying or breach of equal opportunities legislation. The nominated manager for equal opportunities is the office manager/quality assurance co-ordinator. The policy has been updated recently to take into account the most recent and relevant legislation. However, it does not yet make reference to the Special Educational Needs and Disability Act of 2002. The quality assurance manual contains a series of policies which cover a range of the company's activities. There is an audit procedure and plan for monitoring the quality assurance procedures. OTC was accredited with the Investors in People standard in March 2000, a national standard for improving an organisation's performance through its people. OTC prepared its first self-assessment report in September 1999 and the latest self-assessment report, its fifth, was produced for the inspection, in November 2002.

STRENGTHS

- good communication in the organisation
- good links with external organisations
- well-managed staff training and appraisal
- clear strategy for promoting equal opportunities
- good personal support for learners with disabilities
- effective management of complaints

WEAKNESSES

- insufficient organisational targets
- insufficient strategy for the identification and support of literacy and numeracy
- inadequate analysis of data on gender, ethnicity and disability
- insufficient reinforcement of equal opportunities in the workplace
- incomplete quality assurance arrangements

OTHER IMPROVEMENTS NEEDED

- better consistency in recording minutes of departmental meetings
- further development of the strategy for key skills
- more staff development in equal opportunities
- better use of learner and employer feedback
- more thorough audit of internal verification

7. Communication in the organisation is good with a well-structured system of meetings. They include regular board meetings, weekly senior management team meetings, monthly department meetings, health and safety meetings, quarterly staff meetings and, in 2001-02, key skills development meetings. The quarterly staff meetings and the department meetings are used effectively to share good practice. Information from senior management meetings is disseminated effectively to staff during the department meetings. There is some inconsistency in the recording of departmental minutes. Staff are sometimes invited to board meetings to report on their area of work or projects. Staff are involved in projects. For example, an engineering instructor managed and summarised the staff questionnaire. In addition, staff are involved in the audit process and the investigation of complaints. There is effective involvement of all staff in the strategic and business planning process. A day is spent on review and identification of problems related to the business plan which are then summarised by senior managers and fed back to staff. Senior managers explain clearly when problems raised by staff are not being included in the business plan. Strategic documents, such as the business plan are available to all staff and are displayed on noticeboards. Staff have clear job descriptions and a detailed employee handbook used as the basis for induction. Staff complete an induction checklist to indicate that each section of the handbook has been read and understood. The chair of the board visits the premises several times each month. In addition, one of the directors is supporting the development of a quality improvement project.

8. Links with external organisations are used to good effect and a range of projects has brought about improvements in establishing a classroom observation pilot scheme, in developing a clear strategy for key skills improvements and improving retention rates through a retention officer role. OTC has well-established links with a range of

organisations including local colleges and schools, employers, Oldham Chamber of Commerce, the local LSC, the learning and skills development agency, and Connexions. OTC holds open days/evenings for young people and have arranged work experience for learners as part of a local careers initiative. They work in liaison with the local college and five local schools to offer a GCSE in engineering for pre-16 learners. Other staff attend a range of network meetings which are used to identify good practice. The engineering manager attends regional and national engineering meetings. The senior training adviser or her staff regularly attend network meetings on business administration, IT and customer service. Staff have attended training days and network meetings on key skills and this has led to the establishment of a key skills group. One training adviser is also the retention officer. The links with employers are enhanced by the quarterly newsletter which informs, updates and celebrates achievements. This is also used to communicate details of OTC's forthcoming commercial professional development courses. Informal and formal links with employers are well-established through the training advisers. In addition, OTC provides detailed weekly information on learner attendance through e-mail and fax. OTC is aware of the need to improve some areas of communications with employers and have recently developed an employer handbook which gives information on training programmes and clarifies roles and responsibilities.

9. Staff training and appraisal are well-managed and support the development of the organisation. There are clear appraisal and training procedures in the quality assurance manual, which are implemented as planned. The appraisal procedure is supported by detailed notes including a series of questions to assist completion of a pre-appraisal document. In addition, managers have detailed guidance notes. Appraisal takes place each year, is implemented fully and is well monitored. OTC has an annual training plan which clearly details training for each member of staff. It is monitored for attendance or completion of training. The training plan is linked to the business plan objectives. Staff are allowed time to attend training and networks, although the staffing levels are not high. Evaluation sheets are completed after attendance at an external event to identify whether the event would be useful for other staff to attend. Staff have attended a range of training to develop areas for organisational improvement including key skills, assessment training, quality assurance, drugs awareness, recruitment and retention, teaching qualifications, first aid, mentoring training, initial diagnostic and assessment training, and attendance at networks.

10. Organisational targets on the business plan are insufficiently focused on the quality of learning and the learner experience. The objectives in the business plan cover staff, systems, physical resources, quality of service and business financial targets. The targets developed from these objectives are comprehensive, but do not focus specifically on the direct learning process or its improvement. There is slow progress towards completion of the frameworks across the organisation, yet there are no targets for retention or achievement rates. Senior managers review data but analysis has not led to the establishment of targets for improvement. A quality improvement process has been established, but it has not been used to establish targets as yet.

11. The organisation's strategy for the identification and support of learners' literacy and numeracy needs is insufficient. There is no company policy or procedure. Although some learners have been assessed for literacy and numeracy, the process is not systematic and learners are only assessed when difficulties have been observed. OTC does not have a qualified basic skills teacher. A key skills team and a policy and strategy have been established during 2002 and these are having an impact on framework completion in two vocational areas. However, it has yet to have an impact in distribution and warehousing.

Equality of opportunity

Contributory grade 3

12. OTC has policies and procedures for equal opportunities and anti-harassment and bullying which have recently been updated to include a statement on diversity. Equal opportunities is overseen by a senior manager and is included in all inductions for staff and learners. Recently revised review forms include an area for reporting on equal opportunities and staff are being trained how to ask appropriate questions to discover if learners are being harassed or bullied. The LSC has set recruiting targets of 7 per cent for minority ethnic learners and 1 per cent for learners with additional needs, and OTC currently recruits at just below this target. The company is proactive in its recruitment strategies to attract under-represented groups. The building is accessible to learners with restricted mobility. There is a toilet for people with disabilities, and a lift which is large enough to accommodate a wheelchair.

13. The strategy for promoting equal opportunities at OTC is clear, but this was not identified in the self-assessment report. The policy is clearly written and is given to all staff and learners during their induction. It contains a simple set of procedures for dealing with harassment, bullying and breaches of equal opportunities legislation. The policy has been updated recently to include the most recent and relevant legislation. However, it does not yet make reference to the Special Educational Needs and Disability Act of 2002. Before employers contract with OTC, their equal opportunities policies are checked to ensure that they comply with OTC's policy. There is regular and frequent checking that employers' policies are up to date. If employers do not have a policy OTC offers to produce a policy for them. In the induction for business administration, learners are actively involved in making judgements about direct and indirect discrimination through a series of interesting case studies. Recently, all learners and staff have been shown a short and powerful video to help them understand the diverse requirements of learners with additional needs. Employers are welcomed to equal opportunities development sessions at OTC. However, there is still insufficient staff development on equal opportunities and diversity as most staff were trained more than two years ago. Senior staff have had recent training in diversity, and have represented the company at national network training events. There is strong strategic direction to recruit from under-represented groups. While this has not resulted in a high level of recruitment of people from minority ethnic groups and women into engineering, the range and breadth of marketing methods is impressive. In addition to six-monthly open evenings, the company presents positive role models by employing a woman to work as a school liaison officer and a female engineer, employed by one of their workplace providers, to offer advice to prospective learners. The company regularly publishes a newsletter which features positive images of under-represented groups. For example, there is an article showing the progress of a female former learner who is now a successful graduate engineer, and positive representation of minority ethnic learners. In the past, OTC has published literature in community languages. The company hopes that the learndirect link centre recently opened at OTC will encourage more learners from the local community to enter training. OTC has recently employed a researcher from the local minority ethnic community to provide information about the learning needs and aims of this community. It is too early to report on the outcomes of this research. Although learners and staff feel

well protected by the procedures, there is still a gap between the clear strategic direction and the effectiveness of the strategy at an operational level.

14. There is good personal support for learners who have additional learning needs. This was not recognised in the self-assessment report. The company has helped an employer to offer a safe and effective welding apprenticeship for a learner who is profoundly deaf. OTC offered advice to the employer and arranged for a communicator to work with the learner, especially in background knowledge sessions. The trainer sometimes makes three-dimensional models if the learner has problems understanding a two-dimensional diagram. Staff at OTC ensure that the translator has sufficient knowledge of welding to support the learner, and provide worksheets a week in advance so that specific language support can be given to the learner. OTC has also worked with a learner who has epilepsy, offering the employer health and safety support to enable the learner to continue safely with his engineering training. A learner with diabetes is supported by ensuring that staff understand his need for regular meals. However, although all learners have an initial assessment and in some instances literacy and numeracy assessment, this does not lead to effective development of literacy and numeracy skills.

15. There is inadequate analysis of data on equal opportunities and this was recognised in the self-assessment report. There is some analysis carried out to check how many applicants from minority ethnic groups are accepted as learners, but there is no analysis of the retention and achievement rates of under-represented groups. There is no analysis of the relationship between the outcomes of initial assessment and retention and achievement rates. In addition, there is no analysis to show trends and patterns in early leaving and slow progress.

16. There is insufficient ongoing reinforcement of equal opportunities in progress reviews and during on-the-job training. This is partly recognised in the self-assessment report. The review form is designed to record items on equal opportunities, but the recording is often done in a superficial way. Recently the form has been amended to give greater prominence to equal opportunities but it is too early to judge the effectiveness of this. The implications of equal opportunities and anti-harassment and bullying legislation in the workplace is not explored in depth.

Quality assurance

Contributory grade 4

17. The management of complaints at OTC is effective. There is a detailed complaints procedure which is explained to learners and staff at induction. The procedure has been audited and actions for improvement have been identified and fully implemented. It now includes specific targets for response times. The complaints procedure includes a useful form which has sections on the nature of the complaint, the investigative report, recommendations, actions taken and date of completion. This allows each complaint to be monitored. Complaints may be made verbally, in writing or by e-mail. The process is managed centrally by the quality assurance co-ordinator who nominates staff to investigate each complaint. The comprehensive records include responses to complainants. All complaints are discussed at the two-monthly OTC board meetings as part of the chief executive's report. In addition, a complaints summary and analysis by category are prepared for discussion at senior management team meetings.

18. OTC has a quality assurance co-ordinator and a written quality assurance policy, which clearly identifies responsibilities for staff at all levels. The quality assurance manual includes a range of procedures covering marketing, staff recruitment, training and development, health and safety, work placement authorisation, training, internal verification, use of subcontractors, and complaints. These procedures vary in detail, but are implemented in a planned, systematic way. However, the quality assurance arrangements are incomplete as they do not focus adequately on the quality of learning and the learner experience. While the audit process is planned and covers the range of policies, there is some inconsistency in the implementation of the audit. For example, there has been no audit to date on the internal verification procedure for distribution and warehousing. Audits of internal verification have been completed in engineering and in business administration. Inspectors found internal verification to be satisfactory in business administration, but identified that there is insufficient assessment by direct observation in engineering. OTC had not identified this through their audit process.

19. Observation of learning has been introduced recently as a pilot in engineering, with a focus on monitoring the performance of subcontracted staff. However, there is no organisational strategy or guidelines for this process, no moderation process and training has not been sufficiently comprehensive. While there are areas identified for improvement, they have not been used to produce detailed individual action plans or to bring about improvement as yet.

20. OTC has made considerable efforts to establish a culture of improvement, including a procedure on continuing improvement. This procedure, however, is ineffective in the level of practical guidance it gives on how to identify and action improvements. Questionnaires are used to identify the views of learners and employers about the provision, but there is no analysis and use of the results. In addition, while senior managers review data on starts, cumulative numbers, leavers and outputs, data are not analysed in sufficient depth to identify strategies or targets for improvement in retention or achievement rates. The minutes from team meetings do not consistently identify and record actions required to bring about improvements.

21. The most recent self-assessment report was produced in November 2002 and is the fifth report by OTC. There are satisfactory arrangements for self-assessment, which involve all managers and staff, but there is insufficient inclusion of the views of learners and employers in the report. The report is informative, and most judgements are written clearly and are supported by evidence. The development plan is well-presented and clearly identifies weaknesses, actions, the person responsible, target date and monitoring arrangements.

AREAS OF LEARNING

Engineering, technology & manufacturing

Grade 3

Programmes inspected	Number of learners	Contributory grade
Work-based learning for young people	95	3

22. OTC offers training in engineering leading to NVQs at levels 2 and 3. Learners are working towards qualifications in engineering production, performing engineering operations, technical services, manufacturing, design, and maintenance. There are 75 advanced modern apprentices, 11 foundation modern apprentices, and nine on other NVQ programmes. The level 2 NVQ training is carried out in OTC's training centre while the level 3 NVQ is carried out in the workplace. Learners attend the training centre on day release or in a block for fabrication and welding, electrical and electronics engineering and mechanical engineering. OTC offers technical certificates, and some of the learners attend the local college for some aspects of their apprenticeship framework. Learners are recruited through schools or by direct referral from employers. All potential learners are interviewed and have an initial assessment. The results of the tests assist in the choice of vocational programme and suitability for a modern apprenticeship. Learners who need additional learning support, including literacy and numeracy, are given it. Suitable applicants are interviewed by local companies with a view to full-time employment and apprenticeship training. All learners attend a two-day induction programme. Workplace visits are carried out each month by three training advisers, two of whom are qualified assessors. The third started with OTC in December 2002 and is having appropriate training. Workplace reviews have been carried out every 12 weeks but this has recently been reduced to eight weeks. Key skills are taught in the training centre by a qualified tutor. Two awarding bodies are used for vocational qualifications and key skills accreditation.

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

Work-based learning for young people																
Advanced modern apprenticeships (AMA)	2002-03		2001-02		2000-01		1999-2000		1998-99		1997-98		1996-97			
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
	Number of starts	14		27		36		37		27		53		26		
Retained*	0		1		2		4		13		18		14	54		
Successfully completed	0		1		2		4		2		13		4	15		
Still in learning	14		18		22		14		6		1		0	0		

*retained learners are those who have stayed in learning for at least the planned duration of their training programmes, or have successfully completed their programme within the time allowed

Work-based learning for young people																
Foundation modern apprenticeships (FMA)	2001-02		2000-01		1999-2000		1998-99		1997-98							
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
	Number of starts	13		13		16		12		3						
Retained*	11		2	15	3	19	4	33	1	33						
Successfully completed	0		0	0	0	0	0	0	0	0						
Still in learning	11		0	0	0	0	0	0	0	0						

*retained learners are those who have stayed in learning for at least the planned duration of their training programmes, or have successfully completed their programme within the time allowed

Work-based learning for young people																
NVQ Training	2002-03		2001-02		2000-01		1999-2000		1998-99		1997-98		1996-97			
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
	Number of starts	2		7		2		2		17		38		25		
Retained*	0		0		2	100	0		13	76	32	84	24	96		
Successfully completed	0		0		2	100	0		12	71	32	84	24	96		
Still in learning	2		5		0	0	2		0	0	0	0	0	0		

*retained learners are those who have stayed in learning for at least the planned duration of their training programmes, or have successfully completed their programme within the time allowed

STRENGTHS

- very good resources in the workplace
- very good learner support
- good documents to monitor learners' progress
- good strategies for the integration of key skills with vocational training

WEAKNESSES

- poor completion rates for the modern apprenticeship framework
- poor classroom accommodation
- inadequate monitoring of health and safety

OTHER IMPROVEMENTS NEEDED

- greater use of assessment by direct observation
- greater use of visual aids to support background knowledge teaching
- more thorough completion of learning plans
- clearer understanding of the NVQ requirements by some mentors

23. Resources for on-the-job training are very good. Most of the employers offer a clean, friendly and pleasant environment and learners are trained to use very expensive sophisticated industrial machinery, such as computer numerical control (CNC) machines. In addition, the companies offer good opportunities to gather evidence in a wide range of relevant areas. Although the self-assessment report identified that the workshop environment at OTC is good, no mention is made of the on-the-job environment. The centre workshops are satisfactory.

24. Learners are given good support, both on and off the job. Each learner has an appointed mentor in the workplace who may be a manager, supervisor or foreman. While effective help and training are often given by an experienced colleague, the mentor is available for more specific advice and guidance in the workplace and frequently adjusts the learners' schedule to allow for new evidence opportunities. The mentor is usually the employer's representative in progress review meetings. The training advisers provide the link between the employer and OTC, convey information between the two and also carry out the progress reviews. They also carry out assessments in the workplace, give good technical and pastoral advice, and offer guidance with portfolio building. The reviews now take place every two months instead of every three as part of a strategy to improve the completion rates of the framework. The quality of the reviews and associated documents is satisfactory. Assessor visits take place every month. The level 3 NVQ is often started before the level 2 NVQ is achieved and the learners, with an increased focus on achievement, are now guided into early evidence gathering. Assessor/trainers are occupationally competent and have recent relevant experience. However, the observed assessments in the workplace are not consistent in implementation. Interviews with learners in the workplace indicate that assessment is inconsistent and is not carried out during the early part of the learners' programme. Reviews do not include information on assessment planning or the results of assessment. Assessors do not have any master monitoring documents which indicate when learners have been assessed, nor projected assessment dates. Internal verification processes and documents are satisfactory. There are well-qualified and experienced staff at OTC, which was identified as a strength in the self-assessment report. Employers have developed close working relationships with OTC and state that communication is good. All learners consider that the quality of their training is good and speak highly of the overall support they are given.

25. Good documents are in place to support and monitor learners' progress. The documents highlight poor performance, help challenge learners and increase their

motivation towards the end of the programme. For example, a wall chart in the engineering workshop clearly indicates the skills that have been completed towards the performing engineering operations and production engineering programmes. Also, during progress reviews, the trainer works out the percentage of the NVQ and key skills requirements already completed. The figures are then graphically represented on a bar chart for each group of learners. Currently this is only carried out for the 75 advanced modern apprentices. This increased focus on achievement has supported significant progress in unit completion during 2001-02.

26. There are good strategies for the teaching and integration of key skills within the modern apprenticeship programmes. Key skills have been included in training packs. One example, is the modification of the turning training package which forms part of the level 2 performing engineering operations programme. As each turning job is carried out, a list of positive and relevant evidence gathering opportunities is given in relation to key skills. This approach is being extended to the milling training package. A second approach is the use of assignments which include workplace activities, such as pricing and the completion of job cards, as good sources of evidence. This approach has helped learners to build their key skills portfolios.

27. Historically, achievement rates have been poor, but current learners are making better progress. This is evident from the number of NVQ units being achieved in a shorter period of time and the number of learners actively engaged in key skills. For the six-year period to 2001-02, there have been 354 learners on engineering programmes and 79 are still in learning. Of the 275 who have left, only 96 achieved the targets on their individual learning plan. The achievement rate for the level 2 NVQ foundation modern apprentices averaged 60 per cent between 1998-99 and 2000-01. During the same period, the average achievement rate for advanced modern apprentices for the level 2 NVQ was 59 per cent. For 2002-03, 27 of the 29 learners are still in learning and are making good progress. Staffing changes during 2002, and the introduction of a retention officer, as well as a more structured approach to key skills, have resulted in learners making good progress in all areas of their programme. This has been supported by an effective monitoring system which is updated regularly.

28. Classroom accommodation is poor. Heating in the classrooms is below the required standard to achieve a comfortable working environment. Rooms are impersonal, have no individuality and do not stimulate the learning process. There are no pictures or visual aids to indicate that the rooms are used by engineers. There are no PowerPoint projection facilities, and television/video facilities are not readily available, having to be booked one week in advance. Windows do not have blinds, which makes it difficult to see projected images.

29. There is insufficient monitoring of health and safety by centre staff and training advisers who make workplace visits. In one workplace and in the fabrication and welding workshop, some instances of weak practice were observed. Examples include, one learner not wearing protective goggles when using equipment, and another not having the work clamped while drilling. A bending machine was too close to a

designated walkway and constituted a hazard. This was resolved during the inspection. There were no problems with health and safety in the machine training workshop. Machinery is checked for faults by learners, the faults are recorded and returned to the tutors who carry out the necessary repairs. However, the repairs are not recorded and there is no maintenance schedule in place.

30. Initial assessment tests are used to identify which vocational training programme is suitable for learners. The tests are also used to determine which learners need additional learning support. Learners who need support are further tested to determine the level of support needed for literacy and numeracy. However, OTC does not have a sufficiently qualified basic skills tutor. Support measures include learners who are working on key skills at level 1 or 2. At present, OTC has five NVQ learners who are also working towards key skills. However, learners are not retested to check if progress has been made.

31. Few visual aids are available in classrooms. In one observed teaching session, visual aids were not used to demonstrate engineering fits and tolerances. One learner had never seen engineering gauges before and had little idea of their use. Learners expressed a desire to see and handle them. One tutor brought in his own visual aids as they are not available in the centre.

32. Individual learning plans are not being used as working documents at progress review sessions. They are not updated when engineering and key skills are achieved.

33. Some mentors have little or no understanding of the NVQ programmes and are not able to help learners with evidence. Several mentors state that they want to be more involved in the NVQ, and requested further information on programme content and progress. OTC has recently introduced an employer handbook which gives information on NVQs and relevant roles and responsibilities.

Business administration, management & professional

Grade 3

Programmes inspected	Number of learners	Contributory grade
Work-based learning for young people	40	3

34. OTC offers advanced and foundation modern apprenticeships and NVQ training in business administration for 40 learners. There are 22 advanced modern apprentices, 14 foundation modern apprentices and four NVQ learners. There are seven men and 33 women, of whom six are from minority ethnic groups. There are no learners identified with additional learning or social needs. All learners are employed and are recruited through careers advisers, by direct application or through referral by employers. Applicants can start at any time of the year. The recruitment process includes a psychometric assessment before an interview, an initial assessment of basic and key skills and an interview. All learners have a one-day induction at OTC's premises. Some learners attend off-the-job-training sessions at the provider's training centre on half a day each week, while others are trained in their workplace. Learners who are working towards an NVQ in accounts attend the local college of further education on day release. Training adviser/assessors visit learners in the workplace regularly to carry out workplace assessments and portfolio reviews. Progress reviews are carried out every eight weeks.

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

Work-based learning for young people																
Advanced modern apprenticeships (AMA)	2002-03		2001-02		2000-01		1999-2000		1998-99							
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
	Number of starts	8		6		21		21		5						
Retained*	0		1		6		12		3	60						
Successfully completed	0		0		1		4		2	40						
Still in learning	8		4		7		3		0	0						

*retained learners are those who have stayed in learning for at least the planned duration of their training programmes, or have successfully completed their programme within the time allowed

Work-based learning for young people																
Foundation modern apprenticeships (FMA)																
	2002-03		2001-02		2000-01		1999-2000		1998-99							
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Number of starts	4		6		12		19		9							
Retained*	0		3		6		3		0	0						
Successfully completed	0		0		0		1		1	11						
Still in learning	3		5		4		2		0	0						

*retained learners are those who have stayed in learning for at least the planned duration of their training programmes, or have successfully completed their programme within the time allowed

Work-based learning for young people																
NVQ Training																
	2002-03		2001-02		2000-01											
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Number of starts			9		3											
Retained*			2		1	33										
Successfully completed			0		0	0										
Still in learning			4		0	0										

*retained learners are those who have stayed in learning for at least the planned duration of their training programmes, or have successfully completed their programme within the time allowed

STRENGTHS

- good range of additional learning opportunities
- wide range of innovative projects for key skills
- good use of target-setting

WEAKNESSES

- poor completion rates for modern apprenticeship frameworks
- insufficient NVQ knowledge by employers
- poor recording of learners' progress with personal development

OTHER IMPROVEMENTS NEEDED

- greater use of appropriate videos during induction

35. Learners benefit from a good range of additional learning opportunities through

their employer. Some of the courses are on the employers' premises, while others are identified and taught by other organisations. Employers positively encourage their learners to participate in the additional courses and to extend and improve their knowledge and skills base. Courses include food hygiene, health and safety, telephone skills, spreadsheets, presentation software, time management, equal opportunities and diversity, customer care, word processing, corporate induction. One employer gives a sum of money towards any certificated course. The learner with this particular employer is using the money to purchase driving lessons.

36. Learners are involved in a wide range of effective and innovative projects for evidence towards their key skills. Key skills are introduced during the induction programme with an explanation on how they complement and are an integral part of the NVQ. Learners discuss their ideas for a project and ways in which the results will contribute towards improvements in the employers' organisation. Assessors gave good levels of support to help learners fully understand how to approach their individual key skills projects. Learners also benefit from good resources in the training centre to help them to produce posters, illustrations and other related materials. Examples of key skills projects include preparing a questionnaire on travel-to-work patterns, arranging a Christmas party for 140 children of employees, and identifying the most cost-efficient method of identifying suppliers and ordering stationery items. Two groups of learners are also involved in devising, preparing, arranging, costing and finally playing a netball match. These projects produce good evidence for key skills.

37. Effective use is made of short- and long-term targets for learners. Learners attend the training centre for half a day a week and during this time they discuss their progress, areas which require further work or evidence, and what still needs to be carried out to complete an element. Short-term targets are then agreed for the next visit. Those learners who do not attend the training centre are visited in the workplace approximately every four weeks where a similar process takes place. Progress reviews are carried out in the workplace every eight weeks and include progress to date and what has been achieved since the last review, and they identify new targets for the next progress review. This has led to a more focused approach to improving the pace of learner progress and is complemented by the support offered by OTC's trainers and assessors. This strength was identified in the self-assessment report.

38. There is good monitoring of learners' progress. Each learner is given a sheet which identifies the elements and units of their NVQ, along with details of optional units and enhancements. Details of the key skills are also included. Target achievement dates for each element are agreed between the learner and the assessor, and the employer is involved in agreeing the optional units. Good use is made of observations of workplace activities and oral and written questions. When an element is assessed, it is signed off and the monitoring sheet is updated accordingly. In addition, a duplicate sheet, which is kept in the learners' file, is also updated. This method of monitoring enables learners to understand their progress and ensures effective integration of on- and off-the-job training.

39. Completion rates for the framework are poor. However, current learners are making better progress, which is evident from the number of NVQ units being achieved in a shorter period of time and the number of learners actively engaged in key skills. For key skills, the monitoring, target-setting and retention strategies put in place during 2002, have improved the learners' progress, with six learners completing their framework in the past month and a number awaiting their certificates.

40. Employers have insufficient knowledge of the NVQs. When planning on-the-job training, employers are unable to identify tasks and work opportunities which will contribute to the learners' evidence. Employers do not always extend the learners' range of skills and level of experience through involvement in tasks which are not normally available to them. Learners often miss out on temporary vacancies which occur due to illness or absence of other staff, as employers do not link the opportunity to the NVQ. Many employers rely on OTC's staff to let them know what the NVQ requirements are and then modify the on-the-job training accordingly when requested. OTC has recently produced an employer handbook to give information on the training programmes and to identify roles and responsibilities.

41. The recording of learners' progress with personal development during the progress reviews is poor. There is little reference to timekeeping and attendance and no information on the learners' ability to interact with their colleagues, supervisors or managers. There is no record of the learners' ability to use initiative, or of their ability to take a leading role in the work of their department. OTC uses the facsimile machine and e-mail to notify employers on their learners' attendance at off-the-job training sessions. There is little recording of how much knowledge and understanding learners have of equal opportunities.

42. There is insufficient use of appropriate videos in learner inductions to deal with the different learning styles and needs of individual learners.

Good Practice

Assessors have been given a laptop computer to record observations of workplace activities. During the activities, the assessor observes the learner carrying out the tasks and types the observation notes directly into the computer. On completion of the activity, the learner reads the notes and is given a copy of the report. The learner is then able to reflect on the outcome and plan how to improve their performance for the next observation. In addition, the assessor uses a hand-held tape recorder to record the answers to background knowledge questions. The tape is given to the learner for inclusion in their portfolio of evidence.

Retailing, customer service & transportation

Grade 4

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

43. There are 10 learners in this occupational area, three of whom are advanced modern apprentices, six are foundation modern apprentices, and one is an NVQ learner. Seven learners are in distribution and warehousing, and three are in customer service. All learners are recruited directly from member organisations of OTC, where they are employed in customer service, warehousing or stores jobs. Learners are given individual coaching and mentoring in the workplace, as well as on short courses and in workshops at OTC. Some key skills training takes place at OTC workshops, which learners attend for half a day or a full day each week. Some coaching in key skills is also given in the workplace. Currently, none of the learners is receiving additional support for basic skills. All of the activities are operated and managed from the company's main office and training site in Oldham.

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

Work-based learning for young people																
Advanced modern apprenticeships (AMA)	2002-03															
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
	Number of starts	4														
Retained*	0															
Successfully completed	0															
Still in learning	3															

*retained learners are those who have stayed in learning for at least the planned duration of their training programmes, or have successfully completed their programme within the time allowed

Work-based learning for young people																
Foundation modern apprenticeships (FMA)	2002-03		2001-02		2000-01											
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
	Number of starts			8		3										
Retained*			2	25	1	33										
Successfully completed			2	25	1	33										
Still in learning			5	62	1	33										

*retained learners are those who have stayed in learning for at least the planned duration of their training programmes, or have successfully completed their programme within the time allowed

Work-based learning for young people																
NVQ Training																
	2002-03															
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Number of starts	1															
Retained*	0															
Successfully completed	0															
Still in learning	1															

*retained learners are those who have stayed in learning for at least the planned duration of their training programmes, or have successfully completed their programme within the time allowed

STRENGTHS

- varied range of relevant training
- flexible assessor visits
- clear achievement targets
- good support for learners by employers

WEAKNESSES

- poor completion rates for foundation modern apprentices
- insufficient occupational updating of staff
- inadequate initial assessment
- poor implementation of key skills
- weak internal verification

OTHER IMPROVEMENTS NEEDED

- more effective reinforcement of programme information to employers
- better environment for lift truck training
- better learning resources for distribution and warehousing

44. Learners at OTC benefit from a varied range of training that is relevant to their jobs and training programmes. They include lift truck operator training, firstaid and basic health and safety, spreadsheet software, an internationally recognised IT course, and team-leading, in addition to additional optional units from occupational or other related NVQs. All training is accredited and certificated by national bodies. The lift truck training was identified as a strength in the self-assessment report.

45. The frequency of assessor visits is matched to individual learners' needs. Most are visited every two weeks, but this is often modified for learners' convenience. One assessor visits a distribution and warehousing learner on night shift, in order to ensure that the learner receives the required degree of support and frequency of assessment. Other visits are made on evening shifts. Progress review periods have been shortened from 12 weeks to eight weeks, to support learner development. Learners value the support given by assessors and feel that they make considerable time and effort to meet their needs. The assessors are also accessible by telephone.

46. Achievement targets for learners are clearly set and recorded. Short-term targets and action plans are set by assessors at each visit, longer-term targets are set during progress reviews. The targets include NVQ unit achievement dates, which are also recorded on the individual learning plans and on review records. The dates are modified according to each learner's circumstances and rate of progress.

47. Learners are given very good support by their employers. This includes moral support and encouragement to achieve their programme aims. Support is also given by arranging opportunities to gain particular types of evidence for the NVQ, and some learners have had their job roles expanded or modified to help them achieve particular competences. In some instances, learners have been given a time allowance to collect evidence and develop their portfolio during working hours. All learners are able to attend off-the-job training sessions at OTC.

48. The completion rates for foundation modern apprentices are poor. In the year 2000-01, only 33 per cent of learners achieved their programme aims and in the following year, this had fallen to 25 per cent. Despite the poor levels of completion, the retention rates are satisfactory. The proportion of advanced modern apprentices who are still in training since joining in the current contract year is also satisfactory, at 75 per cent. Progress towards achievement of the NVQ is slow for most learners. In one case, a learner has been training for 10 months, but has only achieved one NVQ unit. Another learner has been training for almost five months, and has not achieved a single NVQ unit to date. There is, however, potential for a further six foundation modern apprentices to achieve their qualifications in the coming year, and for another two framework completions within a few weeks.

49. There is not enough updating of their occupational experience by staff. Little professional updating has taken place, although it is planned. Where such experience has been gained, it was at least two years ago, and in occupational areas that are not in mainstream customer service and distribution operations. Although individual staff training and personal development records are maintained, few of them show updating of occupational experience relevant to qualification areas.

50. Initial assessment of learners is inadequate, and is not carried out consistently. Basic literacy and numeracy assessments are only carried out with learners who are unemployed at the start of the training programme. Employed learners are not routinely

assessed. There is no routine, planned support in basic skills, although learners who have taken tests have not had any additional support needs identified. No learners need support with English for speakers of other languages. Basic skills tests are available in the company, but staff have not received sufficient training to effectively interpret and apply the results of these tests. There are also instances of previous occupational experience being recorded along with occupational initial assessment, but this has not been accredited.

51. Key skills are not well implemented. It has taken the organisation considerable time to identify an effective initial assessment tool for key skills, and this was identified in the self-assessment report. Implementation of key skills has been inconsistent and in many cases has been started late. Some key skills assignments are irrelevant to the NVQ and learners' job roles, and opportunities to use NVQ evidence for key skills have not been taken. A better strategy for the management of key skills has been developed in the past six months, with the acquisition of a more appropriate testing and development tool, and the appointment of a person responsible for overall key skills development.

52. Internal verification is weak. Little observation of assessors has taken place over the past year. Although sampling plans are good initially, the completion of the records is inconsistent. Individual sampling records and records of feedback to assessors are poorly completed, with the same standard phrase often used. They have no individuality and insufficient detail. Also, some units in learners' portfolios have been sampled by internal verifiers, but do not include a completion signature and date, as well as unit summary statements of competence from the learner. A number of these points were highlighted as action points at the last external verifier visit.

53. Information on learners' programmes are not effectively communicated to employers. They have insufficient understanding of qualification aims and requirements, and do not fully understand their obligations. OTC has identified this problem and has recently developed an employer handbook which gives information on training programmes and details on roles and responsibilities.

54. Environmental conditions in the lift truck training area vary. The present strip lighting adversely affects visibility if part of it fails. Equally, space in the training area is currently restricted, and does not permit learners to fully experience machine acceleration and braking characteristics, in order for their awareness of safe operating speeds to be fully developed.

55. The learning resources for distribution and warehousing are insufficient. While a range of learning aids is available for lift truck and customer service training, the range of materials to develop learners' background knowledge of warehousing principles and practices is limited mainly to health and safety.