

Learndirect review

**A report by Education Scotland on the external review of
Learndirect Modern Apprenticeships**

16 March 2018

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Context

In November 2017, The Deputy First Minister and Cabinet Secretary for Education and Skills in Scotland asked Education Scotland to undertake an independent and external review of Learndirect's Scottish Modern Apprenticeship (MA) programme.

The strategic vision outlined by the Scottish Government in [Scotland's Youth Employment Strategy](#) (2014) is for a post-16 education and training sector in which:

- all provision, regardless of provider, is focused on providing young people with the skills, knowledge and attributes necessary to support Scotland's economic growth and maximise their life chances;
- all providers and their key stakeholders work together regionally and nationally to ensure high quality provision that meets the needs of learners and employers; and
- the relevance and quality of this provision, the extent to which it supports economic growth and post-16 reform, and the outcomes learners achieve are evaluated through an appropriate blend of self-evaluation, external scrutiny and public reporting through a national quality assurance and quality improvement system.

A team of Her Majesty's Inspectors (HMI) from Education Scotland and Associate Assessors (AA) from Scotland's colleges and from Skills Development Scotland (SDS) was established to evaluate the quality of Learndirect's MA programmes in the Business Administration, Management, Accounting, Providing Financial Services, Social Services and Healthcare, Hospitality and Retail sectors.

The team from Education Scotland conducted visits to employers during the external review. Associate Assessor input ensured that each review team had the expert knowledge and industry-related experience to ensure a full and well-informed external review process.

The external review included the following:

- observation of training activities;
- discussions with centre managers, employers and staff;
- discussions with Learndirect Board members, Executive Team, managers and staff; and
- discussions with employers and apprentices.

This report sets out the findings of the external review. Twelve months from publication, a smaller team of HMI and AAs will return to visit Learndirect managers and some of the employers and apprentices to evaluate progress against the recommendations.

Learndirect was launched in 2000 in direct response to the UK Government's concept of a University for Industry and given a remit to use new technology to transform the delivery of learning and skills across England, Scotland, Wales and Northern Ireland.

In Scotland, Learndirect is a leading provider of apprenticeships. The main sectors in which it works are Retail and Customer Services, Financial and Business Services, Food and Drink, and the Hospitality and Care sectors. Annually Learndirect recruits up to 1000 new apprentices. Learndirect works with a range of employers across Scotland, from large corporate customers to small and medium size enterprises.

Grades

The overall grade for each of the quality indicators evaluated, summarised from the centres visited, are shown below:

Outcomes and impact		Delivery of Training		Leadership and Quality Culture
How well are apprentices progressing and achieving relevant, high-quality outcomes?	How well do we meet the needs of our apprentices and stakeholders?	How good is our delivery of training?	How good is our management of training delivery?	How good is our strategic leadership?
good	satisfactory	good	satisfactory	good

An evaluation of **good** applies to provision characterised by important strengths which, taken together, clearly outweigh any areas for development. An evaluation of good represents a standard of provision in which the strengths have a significant positive impact on apprentices. However, the quality of apprentices' experiences is diminished in some way by aspects in which development is required. It implies that the centre should seek to improve further the areas of important strengths, but take action to address the areas for development.

An evaluation of **satisfactory** applies to provision characterised by strengths which just outweigh areas for development. An evaluation of satisfactory indicates that apprentices have access to a basic level of provision. It represents a standard where the strengths have a positive impact on apprentices' experiences. However, while the areas for development will not be important enough to have a substantially adverse impact, they do constrain the overall quality of apprentices' experiences. It implies that the provider should take action to address areas of weakness while building on its strengths.

For this review of Learndirect MAs, Education Scotland evaluated the provision of the providers' off-the-job training in the following centres between September 2016 and January 2018:

Tesco Bank	Morgan Stanley	KPMG
Poundland	Greggs	Dobbies Garden Centres
New Look	Subway	Prudential
Lloyds Banking Group	Direct Line	Scottish Widows
Nuparc	Bank of Scotland	Peter Vardy
Royal Bank of Scotland	D'nisi	The Caledonian Hotel
Barista	McColls	Pets at Home
Old Waverly Hotel	Sky UK	David Cargill House Nursing Home
Hogganfield Loch Nursing Home	The Richmond Fellowship	Heatherfield Community Care Ltd
Viewland House		

Outcomes and impact

How well are apprentices progressing and achieving relevant, high-quality outcomes?

GRADE – good

How effective are training providers at achieving and maintaining high levels of service delivery?

Areas of positive practice

- Most apprentices value their qualifications and are able to identify the relevance to their job roles.
- Most apprentices are motivated by the ease with which they can identify naturally occurring evidence from their day-to-day tasks, which can be matched effectively to their qualifications.
- Most apprentices are on target to achieve the goals which they set at progress reviews with their assessors.
- The levels of achievement in administration and financial services are higher than the average for those sectors by 8% and 11% respectively. In retail and hospitality programmes the levels of achievement are broadly commensurate with the national benchmark for those sectors.
- In almost all of the administration and financial services programmes visited, the levels of achievement were very high.
- Across all programmes, most apprentices have an Individual Learning Plan (ILP) which is agreed and negotiated with Learndirect assessors to set targets and track attainment. This supports apprentices well in identifying where they are succeeding and areas where they require further support or individual input.
- Overall, apprentices raise concerns about their progress with their assessors during regular meetings and record discussions on their ILP. These are then selected by the assessor and discussed with the learners to offer support and resolve issues.
- Most employers retain their apprentices in full-time employment when their qualifications are completed.

SDS Performance data (Leavers and achievers) from January 2016 to 24 November 2017		
Occupational group	Performance achievement rate for Learndirect MAs	Average achievement rate for occupational group
Administration and related	86%	78.4%
Financial services	74.7%	63.3%
Hospitality and tourism	59.5%	62.2%
Retail and customer service	70.3%	71.3%
Sport, health and social care.	26.7%	68.6%

Areas for development

- Employer contacts, particularly in financial services programmes, highlighted that there was limited opportunity for apprentices to fast-track through their qualification in a shorter timescale, delaying their achievement.
- There are very low levels of achievement in care programmes and they are significantly lower than the national benchmark.
- In a few cases, apprentices do not keep a contemporary ILP and are therefore unaware of their general progress.
- In a few programmes, apprentices are placed on programmes by Learndirect at too high or too low a level. For example, in care programmes, apprentices are placed on qualifications which are set at too high a level for them and some units are not relevant to their job role. Other employers would value Learndirect differentiating apprentices more fully and effectively, allowing them to undertake a level 3 qualification rather than level 2. This would provide opportunities to stretch the more able candidates.

How well do providers adhere to statutory principles and guidance?

Areas of positive practice

- Comprehensive arrangements are in place to ensure apprentices appreciate the importance of embedding diversity and equalities outcomes, and safeguarding in their daily work. These are presented at induction meetings and followed up over the course of the programme by assessors.
- Apprentices understand well the importance of health and safety regulations and see the importance of maintaining these standards within their role.
- Almost all assessors understand the necessity to comply with external awarding bodies such as City and Guilds and Scottish Qualification Authority (SQA). They comply with assessment strategy and standardisation activities.
- Apprentices with additional support needs are aware of the processes and support available to them and are helped well by their assessors through their regular meetings.

Areas for development

- There has been very little improvement in the gender balance on apprenticeship programmes.
- In a care programme, an SQA external verifier reported concerns which led to a short-term suspension of the award and an action plan being put in place.

How well do we meet the needs of our apprentices and stakeholders?

GRADE – satisfactory

How well do apprentices make progress and achieve individual outcomes?

Areas of positive practice

- Entry requirements are explicit and employers engage well overall at the interview process to recognise the range of skills required to enter training.
- Apprentices are interviewed by Learndirect staff and their prospective employers. They are provided with sufficient information to make decisions about their chosen programme.
- Apprentices are prepared well for their programme following a well-considered induction programme, prepared by Learndirect staff.
- In almost all cases, monthly meetings between Learndirect assessors and apprentices are well planned and support apprentices to identify their future learning goals and milestones.
- Almost all apprentices value their programme and understand the place of the programme in meeting the needs of their job role.
- In general, core skills are planned well and take account of apprentices' prior learning.
- Most apprentices are making good progress in developing skills and competencies related to their job roles.
- In most cases, apprentices are prepared well by assessors and employers for the different activities they undertake in their job roles. Assessors link training needs well to apprentices' programmes.
- Most apprentices in retail and hospitality work well independently and are confident in carrying out duties with minimal supervision. This contributes to their employers' business needs through higher levels of productivity.
- Almost all employers recognise the skills apprentices bring to the workplace and the contribution they make to their businesses.

Areas for development

- In more than a few cases, employers and apprentices do not provide sufficient feedback on their experiences within the programme. As a result, opportunities to improve the programme and the outcomes for apprentices are missed.
- In more than a few programmes, core skills are viewed by apprentices as irrelevant to their training and are not contextualised sufficiently to their specific job roles.
- A few apprentices in retail, hospitality and financial services programmes, particularly in employers with high volumes of customers, find it difficult to gain appropriate support and guidance from their employer or manager. This limits their opportunities to develop the appropriate skills for their job roles.
- In a few programme areas, the employer, manager and apprentices are not involved in the selection of optional units, which could also be matched to the job roles of the apprentices.

Delivery of Training

How good is our delivery of training?

GRADE – good

How well does the design and delivery of training meet the needs of apprentices and employers?

Areas of positive practice

- Most apprentices are complimentary about their assessors from Learndirect and subcontractors. They find them helpful in undertaking online assessments and other activities.
- Almost all assessors are in regular contact with apprentices every four weeks, with a progress review every 13 weeks. For example, the apprentices in retail programmes confirmed that they have regular and effective communication with assessors. Their assessors are very helpful in ensuring they make good progress and are challenged with tasks in their job roles.
- In almost all cases, apprentices are enthusiastic and highly motivated and engage well in their programme. Many work well with other members of their cohort and this peer support is very important for their ongoing development.
- Most apprentices are given appropriate time in their work schedules to develop their skills and progress on their programme. This works well.
- Early involvement in the planning of the programme enables the majority of employers to select and match relevant optional units to the apprentices job role. This also helps to complement the training delivered by the employer.
- Apprentices value the coaching that assessors provide during their visits to the workplace, as well as the detailed logging and tracking of progress during the formal progress reviews. This was particularly strong in hospitality and retail programmes.
- Generally, apprentices welcome the standard workbooks provided to them. They consider them to be a useful resource to underpin their development. Effective questioning by assessors supplements the workbooks to good effect.
- Most apprentices have access to online resources to support their learning and sustain them in their progression.
- The learning environments are of a high standard and appropriate with on-the-job training activities in the various occupational sectors.

Areas for development

- Some apprentices in financial services experienced delays in receiving their workbooks, which hinders their ability to keep pace with their studies. For example, at a large financial services employer, delays frustrate apprentices, and in another employer, apprentices feel the sequential workbook approach to gathering evidence does not reflect their on-the-job training.
- In a few cases, apprentices are unclear about their induction to their programme and their ongoing progress.
- Some apprentices on care, business and hospitality programmes are placed on too high a level of programme and do not have a sufficient choice of options to help them achieve their career ambitions.
- In too many cases, particularly in retail and hospitality programmes, assessors are involved in assessment only. They do not have the levels of contact with managers to engage fully in discussions on training activities for their next visit.

How well is training delivered?

Areas of positive practice

- Assessors demonstrate appropriate experience in their roles and deliver assessment feedback timeously to help apprentices plan their progress.
- Most assessors engage well with employers and apprentices. Their regular visits to the workplace help support apprentices improve and develop their confidence and skills.
- Learndirect telesales staff discuss with employers their training requirements for apprentices and visit the employer. Learndirect staff then advertise for apprentices and undertake an initial telephone interview, passing on the details of the interviewees to the employers. This helps to ensure employers have access to prospective apprentices with the appropriate attitudes and competencies.
- In the first few days of their programme, Learndirect assessors meet the successful candidates to describe the *commitment agreement*, create the ILP and support them in the first ten days of their programme.
- Most apprentices utilise an online portfolio and are confident in using it to receive feedback and provide evidence for assessment purposes.
- Planning of the delivery of monthly sessions between assessors and apprentices works well and the ILP is used effectively to discuss future learning goals.
- Many assessors utilise digital voice recorders to record verbal evidence when they meet candidates. This is particularly useful in busy working environments.
- Assessors encourage apprentices to utilise experiences from their work practices. This stimulates discussions and develops apprentices' learning.
- In most cases, feedback to apprentices is supportive in helping them understand what they have learned and achieved, and what they still have to work on and improve. For example, some assessors use a Red, Amber, Green (RAG) system to alert learners to the levels they are achieving. Apprentices welcome this approach and it helps to motivate them to progress.
- Almost all apprentices enjoy their programmes and many see the relevance of what they are learning by applying it to their everyday job roles.
- Relationships between Learndirect staff and the employers, managers and apprentices are generally of a high standard.

Areas for development

- Apprentices and their managers are surveyed regularly by Learndirect, but the levels of engagement are highly variable and, in some cases, very low.
- The lack of contact between Learndirect assessors and subcontracted assessors, means that apprentices and managers are unsure of progress and what is required next for apprentices. Discussions focus too much on the completion of tasks and qualification aims rather than setting specific targets to ensure that apprentices develop a broader range of skills and knowledge. This aspect greatly diminishes the learning experience for apprentices and has a significant impact on their confidence levels.
- Many apprentices do not appreciate the value or place of core skills in their programmes, perceiving them as an irrelevant necessity in order to gain their award. As a result, some apprentices make slow progress and the key role of core skills in MA programmes is diminished.
- The delivery of training in some subcontracted financial services programmes is old fashioned and not sufficiently stimulating, utilising a powerpoint and audio recording. For example, most apprentices in one large employer felt they would benefit from a local tutor, with whom they could engage in face-to-face discussions about their learning.
- In general, apprentices have little influence in the design or delivery of their programmes.

- Frequent changes of assessors in almost all programmes do not provide for continuity of relationships with apprentices and building relationships with new assessors can be disruptive for apprentices.
- In a few business programmes, access to online services had not been agreed beforehand with employers and apprentices did not have the security protocols necessary to allow free access to external systems.

How well do staff reflect on provision to improve training?

Areas of positive practice

- Learndirect has introduced an observation process called Observation of Teaching, Learning and Assessment (OTLA), in which the assessor is observed by a manager at least twice per year and reviewed on a regular basis.
- Assessors hold regular standardisation meetings with their regional managers and use a RAG status to identify and monitor issues.
- Internal verification processes have been improved recently to become more robust. This is making a positive difference to programmes as the focus on quality improvement has progressed well. For example, there are now regular standardisation meetings between assessors and managers

Areas for development

- The Apprentice Voice survey return is much lower than the 40% target set by Learndirect.
- Where subcontractors deliver programmes on behalf of Learndirect, there is insufficient discussion on delivery and provision with the subcontractor assessor and Learndirect staff.

How good is our management of training delivery?

How well does the centre work with partners to improve outcomes for apprentices?

GRADE - satisfactory

Areas of positive practice

- Learndirect use a subcontractor to deliver some business administration programmes to a range of apprentices with national employers. The employers are generally satisfied with the provision as the programme is successful in providing apprentices with the qualifications required to progress toward professional qualifications.
- Learndirect has worked with colleges and regional partners in developing Foundation Apprenticeships and Learndirect staff are improving the focus for school learners on apprenticeships as a career option.
- In general, in retail, hospitality, financial services and administration programmes, Learndirect assessors work well with employers and managers to ensure that training for apprentices is relevant and meets the needs of the apprentice as they develop as employees.

Areas for development

- Contact between Learndirect and subcontractors is insufficient. For example, contact with employers on subcontracted programmes is left to the subcontractor and this is inadequate as Learndirect staff are unaware of arising issues related to the quality of delivery.
- In too many programmes, the communication between employers and Learndirect assessors is poor and managers are unaware of the on-the-job training requirements, linked to the apprenticeship programme. This means that they cannot support the apprentices to appropriately gather evidence and support their progression.

Leadership and quality culture

How good is our strategic leadership?

GRADE - good

How appropriate and influential are the contracted provider's vision, values and aims?

Areas of positive practice

- Members of the Learndirect Board of Management work closely with the Executive Team to gain an understanding of the landscape of apprenticeships in Scotland. This helps to drive Learndirect's national policy. For example, the company has set itself four major ambitions to support its transition period. These give clarity on the strategic direction of the new Learndirect company.
- A Board subcommittee of senior Scottish staff meets weekly to inform Board members of issues in the apprenticeship programmes in Scotland. The Executive Team has a differentiated approach to considering the needs of Scottish apprenticeships in relation to Scotland's apprenticeship policies and other national priorities.
- The Executive Team meets regularly to discuss issues around quality in the apprenticeship programmes and this is fed into formal Board meetings. These issues are discussed and progress reports are requested as standard features of the meetings and help to drive improvements to programmes.
- Overall, Learndirect has responded well to government strategies such as Developing the Young Workforce (DYW). For example, it has been closely involved in the design and delivery of Foundation Apprenticeships in financial services.
- Learndirect's main objective is to inspire people to achieve their potential. This refers to both staff and apprentices and robust processes are in place to help staff members evaluate their practices and make improvements. Although at an early stage, this is working well.

Area for development

- Learndirect managers do not engage sufficiently with DYW regional groups on a regular basis. This limits opportunities to develop strategies to meet key performance indicators on the expansion of different types of apprentices and other vocational qualifications.

How effective is leadership for partnership working and delivery of training?

Areas of positive practice

- Overall, the senior team has developed strong partnerships with employers. It works collaboratively with relevant partners to help inform apprenticeship programmes and influence new proposals for apprenticeships with employers and government.
- Learndirect is proactive in engaging with key Scottish policy leading stakeholders. This helps the company to generate strategies to respond to current skills priorities in Scotland.
- Learndirect has a strong employer engagement strategy to build sales, with a dedicated employer engagement team that ensures their programmes meet the needs of employers.
- In general, there are regular surveys of apprentices as they go through their programme and Learndirect staff speak to them to gain their views at the end of the twice-yearly observation process for assessors.
- The team of staff in Scotland is led well by managers. Staff are helped by a robust performance management process to ensure they feel engaged and supported to make improvements.

Areas for development

- In some programmes, managers do not react sufficiently well to the problems caused by the high turnover of assessors and their lack of contact with apprentices and managers. This greatly diminishes the experience for apprentices.
- Contact between Learndirect staff and subcontracted staff who deliver programmes, is variable. For example, at a large employer there has been little contact, which is part of the due diligence within the contract.

How well do leaders secure improvement of quality and impact of training?

Areas of positive practice

- Managers review assessors regularly as part of the performance management processes. This helps to maintain standards and consistency across the various procedures and protocols for quality provision.
- Most employers in retail and hospitality engage well with assessors in discussions around planning of provision and are therefore able to influence the design of the programmes.
- Assessors regularly participate in Learndirect Continuing Professional Development events such as standardisation activities and Friday in Office events and the Performance and Competency Framework.
- Learndirect staff engage fully and effectively with the SDS self-assessment processes which are utilised to inform improvement actions.
- Managers communicate effectively with assessors and contractors to ensure that standards are met and apprentices are progressing in their programmes.
- Monthly meetings between senior managers and regional managers in Scotland help to identify issues and concerns and deliver actions to ensure quality is enhanced.
- The Head of Region meets quarterly with the team of managers to discuss the results of observation processes and follow up on areas for development.
- There is regular communication between managers and the regional staff which provides a focus for activities on improvement.

Areas for development

- Returns of feedback from employers is inconsistent and some have no knowledge of the system for collecting feedback.
- There is insufficient sharing of best practice at the regular standardisation meetings, which reduces opportunities to introduce improvement initiatives across all programmes.
- In more than a few cases, employers are not engaged sufficiently with Learndirect assessors and the connections between the apprenticeship programme and the working environment are not sufficiently strong.

Recommendations

Learndirect should ensure that:

- achievement rates for all apprentices improve and are at least commensurate with, or above, the national benchmark rate for each occupational sector;
- all apprentices have opportunities to discuss their training needs jointly with assessors and their employers or managers, to ensure their programme matches their job roles and they are making good progress;
- communication with employers results in apprentices being placed on the appropriate level of training programme, which meets their needs and enables them to achieve at a suitable pace;
- the turnover of assessors is reduced and that improved continuity of assessors results in stable relationships with apprentices;
- core skills provision and assessment are more specific and are contextualised to the apprentices' job role; and,
- communication with subcontractors is more regular and systematic, and results in improvements to quality of delivery of the programme for apprentices.

Appendix 1 - External review methodology

A team of HMI from Education Scotland and AAs from SDS and colleges conducted visits to employers for the external review. Associate Assessor input ensures that each review team has the expert knowledge and industry-related experience to ensure a full and well-informed review process.

The external review included the following:

- observation of training activities;
- discussions with centre managers, employers and staff;
- discussions with Learndirect Board members, Executive Team, managers and staff; and
- discussions with employers and apprentices.

Upon conclusion of the external review, a written report is provided to Learndirect by Education Scotland. This includes the grades awarded for each of the five high-level questions posed during the review (see below). This report is shared with SDS and Scottish Government and will be published on Education Scotland's website. A smaller team of HMI and AAs will return to visit Learndirect management and some of the employers in the sample in this report to gauge progress against the recommendations.

This report uses the following terms to describe numbers and proportions:

almost all	over 90%
most	75-90%
majority	50-74%
less than half	15-49%
few	up to 15%

Appendix 2 – Grade exemplification

The grades which will be awarded to each of the elements are:

excellent	Outstanding and sector leading.
very good	Major Strengths.
good	Important strengths with some areas for improvement.
satisfactory	Strengths just outweigh weaknesses.
weak	Important weaknesses.
unsatisfactory	Major weaknesses.

Grade illustrations

- An evaluation of **excellent** applies to provision in which apprentices' experiences and achievements are of a very high quality. An evaluation of excellent represents an outstanding standard of provision which exemplifies very best practice and is worth disseminating beyond the current provision. It implies that very high levels of performance are sustainable and will be maintained.
- An evaluation of **very good** applies to provision characterised by major strengths. There are very few areas for development and any that do exist do not significantly diminish apprentices' experiences. While an evaluation of *very good* represents a high standard of provision, it is a standard that should be achievable by all. It implies that it is fully appropriate to continue to make provision without significant adjustment. However, there is an expectation that the centre will take opportunities to improve and strive to raise performance to excellent.
- An evaluation of **good** applies to provision characterised by important strengths which, taken together, clearly outweigh any areas for development. An evaluation of good represents a standard of provision in which the strengths have a significant positive impact on apprentices. However, the quality of apprentices' experiences is diminished in some way by aspects in which development is required. It implies that the centre should seek to improve further the areas of important strengths, but take action to address the areas for development.
- An evaluation of **satisfactory** applies to provision characterised by strengths which just outweigh areas for development. An evaluation of satisfactory indicates that apprentices have access to a basic level of provision. It represents a standard where the strengths have a positive impact on apprentices' experiences. However, while the areas for development will not be important enough to have a substantially adverse impact, they do constrain the overall quality of apprentices' experiences. It implies that the centre should take action to address areas for further development while building on its strengths.
- An evaluation of **weak** applies to provision which has some strengths, but where there are important areas for development. In general, an evaluation of weak may be arrived at in a number of circumstances. While there may be some strengths, the important areas for development will, either individually or collectively, be sufficient to diminish apprentices' experiences in substantial ways. It implies the need for prompt, structured and planned action on the part of the centre. Where a grading of weak is given, it will lead to follow-up activity from SDS compliance managers.
- An evaluation of **unsatisfactory** applies when there are major areas for development in provision requiring immediate remedial action. Apprentices' experiences are at risk in significant respects. In almost all cases, staff responsible for provision evaluated as

unsatisfactory will require support from senior managers in planning and carrying out the necessary actions to effect improvement. This may involve working alongside other staff or agencies in or beyond the immediate support given by the centre. Where a grading of weak is given, it will lead to a follow-up review by staff from SDS and Education Scotland within a year.

If you want to give us feedback or make a complaint about our work, please contact us by e-mail: complaints@educationscotland.gsi.gov.uk, or telephone us on the number below, or write to us addressing your letter to

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