

Commercial in Confidence



HADDON TRAINING LTD



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1. Assessment Information

Assessment Type	ACCREDITATION REVIEW
Assessor's Decision	STANDARD MET
Assessor's Name	JOHN PAWSEY
Visit Date	06/03/2018 – 08/03/2018 (3.0 days)
Client ID	C10370
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2. Organisation – Introduction, Aims, Objectives & Outcomes

Haddon Training Ltd based in Marlborough, Wiltshire, is a training provider specialising in equine and business related apprenticeships at Levels 2, 3 and 4, with a mix of frameworks and standards. Delivery is across England (as a Prime Contractor), and Wales under contracts with Torfaen Training Company and Cambrian Training Company. Haddon Training also offers the AASE¹, a Level 3 programme for elite athletes, for British Show Jumping.

Some staff is based in the head office, whilst others are geographically spread across England and Wales.

Since the 2015 assessment, there has been a number of staff changes, apprentices recruited, and following recent internal consultations a new mission statement, *“Developing potential for future success”* and values – *“Passion; Quality; Support; Integrity”* have been launched. *“Mission and core values drive our culture and are the foundation of our day to day activities. When values are clear, making decisions is easier.”*

Information, advice and guidance (IAG) is provided by the Business Development Team, Operational Managers, and Trainer-Coaches. Other members of staff provide elements of IAG to parents and carers, employers, apprentices and delivery partners. To illustrate this, a number of examples were provided e.g. employment regulations, allaying parental concerns, and pay related questions. Staff would signpost people as and when required.

IAG is identifiable throughout the learner journey, starting with employer engagement, at pre-entry, and induction, which might be provided in group and one-to-one settings. Learner information is held electronically and password protected. Barriers to learning are identified and support planned for. Options and choices are explained, as well as the commitment required by both learner and employer. Throughout programmes, IAG is provided at pre-planned learner reviews, which are documented and recorded on the management information system. Towards the end of each programme there is an exit review to gather feedback and consider progression, which might be to the next programme level.

Quality Improvement and Operational Business Plans, the Common Inspection Framework and mission and values are business drivers. The recently developed, next 18 months plan identifies the challenges faced by Haddon Training and sets out a 6-point plan (objectives) including: operational efficiency (15% net contribution by 2019; maintain an average of 600 in-learning, non-levy apprentices; levy income of £550k by July 2020; grow Welsh contracts to £500k by July 2010; a zero error rating; and maintain a Grade 1 at the next Ofsted inspection.

Clear leadership and direction provided by the Chief Operating Officer (COO) and management team ensures that staff have a good understanding of their role and importance of IAG in making a measurable contribution to achieving or exceeding Haddon Training’s overarching objectives, as well as those at a service and/or contractual level.

¹ Advanced Apprenticeship in Sporting Excellence

Key performance indicators include: 90% timely completion rate; in 207/18 to improve level 2 to 3 progression rates from 22% to 30%; to improve Traineeship progression rate from 66.7% to 75% in 2017/18; maintain or better recruitment profile; caseload management of 35 learners per trainer-coach, per annum.

Haddon Training is firmly focussed on delivering learner outcomes, such as timely completion and gaining the qualification they entered for, thus achieving contractual deliverables. At the learner level, personal outcomes might be identified and recorded during learner reviews, which may change as the learner progresses.

The use of skills assessments and programme components such as PLTS², PDBW³ and ESDGC⁴ all provide opportunities to identify soft skills and monitor their development, which might be expressed in terms of a change in behaviour, increased understanding, self-confidence, and communication skills. It is suggested Haddon Training could do more regarding its collection and analysis, and how it could inform self-assessment, further define learner outcomes, and illustrate the wider impact of the service.

Haddon Training's offer is clearly described on its website and in hard copy promotional resources. Specialist and industry experienced staff build relationships with learners and employers to promote learning, as well as to fully understand both party's requirements so that there is tailored provision. The Business Development Team handles a range of enquiries, which also provide opportunities to explain the range of services and support available. Social media is also used to promote the service, as are case studies and promotional videos. Each learner is provided with a handbook, providing a raft of useful resources, and further defining the service offer. Learners and employers felt that they had good information about provision and could *"always ring up and speak to someone in the office"* or *"speak to the trainer-coach"* if they were unclear or in need of reassurance.

Services are delivered effectively to meet the needs of the employer and learner, to meet contractual deliverables and in-house performance indicators. The Business Development Team effectively engage with staff in order to manage caseloads, with employers to understand their needs and fill apprenticeship or traineeship vacancies, as well as deal with enquiries related to the contract in Wales, particularly as funding rules differ to those in England.

Sign-up and enrolment processes continue to be separate, which contributes to case-load management, facilitating quality assurance, and reducing error rates thereby reducing the risk of ESFA⁵ claw back.

² Personal Learning and Thinking Skills

³ Personal Development, Behaviour and Welfare

⁴ Education for Sustainable Development and Global Citizenship

⁵ Education and Skills Funding Agency

Learner handbooks include learner journey maps and information on career progression and pathways. Frequent visits by trainer-coaches to the workplace ensure regular learner reviews take place to ensure learners remain on track, and corrective action taken as and when required. Learner reviews also include the employer. In between visits support is available via text, phone and e-mail. Handbooks contain references to additional resources. Staff are provided with tool kits to support topics, including for Safeguarding and Prevent.

Haddon Training monitors and evaluates performance against contractual performance targets, national benchmarking data, feedback reports and the Common Inspection Framework. Reports are drawn from management information systems, which are analysed and discussed during senior management team meetings, operational meetings and annual appraisals. This ensures that issues are identified and action taken. Operational plans, such as the recently created 2018 Q1 and Q2 Lead Generation and Recruitment Plan, are in place to ensure that all aspects of provision contribute to achieving organisational and service aims and objectives, as well as drive the improvement strategy.

2016/2017 outturn figures indicate achievement rates of 70.8% and 77% for intermediate and advanced apprenticeships respectively, which is around 15% above the national average. Customer satisfaction is at 90%. Conversion of leads to starts following IAG is at 95% enabling the organisation to meet programme profiles. Elsewhere in this report reference is made to performance outturns and how this has informed improvement for 2017/2018.

Other improvements / changes aligned to the business strategy include:

- increasing provision for National Health Trusts, now working with 14
- increasing the training portfolio to 32 programmes
- undertaking cyber security essentials in preparation for GDPR⁶
- introduced targeted marketing in order to drive up the number of starts
- reduced the number of out of funding (OOF) learners, from 100 to 15, with a further reduction in the coming year
- staff training to fully understand the complexity and differing working practices for provision under Welsh Government funding rules.

⁶ General Data Protection Regulation

3. Strengths

A number of strengths were identified during the assessment. These are detailed below. The numbers in brackets refer to the element and criteria of the **matrix** Standard.

- Leadership and management are proactive in addressing challenges within the sector it operates in. Managers explained that “*growth and quality have to go hand in hand.*” A detailed self-assessment, QIP and strategic plan, including “The next 18 months” are operational drivers. Staff commented positively about internal communications, the “open door” policy, knowledge and support of managers. Staff feel empowered, valued and commented that “*contributions are listened to and acted upon,*” e.g. the revised mission and values statements. Staff can identify with the values and explained their meaning within the context of their roles and responsibilities. (1.2)
- Staff are sensitive to the needs of employers, learners, parents and carers. Staff described with examples how key policies e.g. safeguarding, confidentiality, data protection, are complied with and embedded in learning programmes. (1.3)
- Partnership working is used to increase accessibility, widen participation and increase skills within the equine and business sectors. Haddon Training carefully selects organisations it works with, and has built and maintained effective relationships with a range of employers and partners who commented positively about Haddon Training’s quality of provision and reputation. It should be noted that the preceding comments are based upon discussions with employers and partners, and reference should also be made to areas for development. (1.8)
- Trainer-coaches have a broad range of sector knowledge gained from first-hand experience having worked or continuing to work in the sector, which is valued by both employers and learners. Head office staff demonstrated a good understanding of their role and responsibilities, and explained the opportunities open to them to explore other functions. Informal observations provided an opportunity to see how staff dealt with enquiries from learners and employers, who felt confident in the help and support provided by Haddon Training. Staff described how they had progressed within Haddon Training, and opportunities open to them to gain new skills and relevant and appropriate IAG qualifications. (2.3)
- A number of feedback methodologies and opportunities are employed, with good response rates. Data is regularly analysed, identifying opportunities for improvement which are acted upon. Reports are provided to senior managers and results cascaded to staff via team meetings. (4.3)

4. Areas for Development

A number of areas for development were identified during the assessment which may develop or enhance the service delivered. These are detailed below and for the organisation to consider as part of its on-going continuous quality improvement actions. The numbers in brackets refer to the element and criteria of the **matrix** Standard. These will form the basis for discussion at the Continuous Improvement Checks (CIC) conducted twelve and twenty-four months from the date of this Assessment, along with any other notable developments.

- Staff described examples of providing impartial IAG. Consideration could be given as to how this might be evidenced across provision, perhaps by amending feedback methodologies to include questions about being treated fairly and impartially. Standardisation and trainer-coach team meetings might also provide opportunities to identify and illustrate an impartial service with due regard to equality of opportunity. Linking to other suggested areas for development and the Common Inspection Framework, observation of practice might also provide opportunities to evidence an impartial service. (1.3; 3.3)
- Implement a programme of office safety checks to ensure a safe working environment, including adhering to portable appliance testing regulations. (1.4)
- With reference to the website, Haddon Training might wish to:
 - update relevant pages to reflect the recently revised mission statement and values. (1.1)
 - under “Our commitment to you,” consider links to relevant policies and where protected characteristics stated, include all; not some of them. (1.4)
 - raise the profile of the IAG service by including it on the home page so that it sits across both equine and business provision. Consider also explaining what IAG is, and how and when it is provided. Reference could be made to policies underpinning provision, for example, confidentiality and impartiality. Such information might be helpful to employers, partners, learners and potential learners, or anyone landing on the website. (1.6; 3.1)
- Measurable aims and objectives focus on hard outcomes. Through aspects of provision, feedback from learners and trainer-coaches there is a learner journey through soft outcomes under PLTS, PDBW and ESDGC, which could be systematically captured and used to evidence the wider impact of IAG provision, which could inform self-assessment and service development. (1.5; 3.1; 3.2; 4.2)
- The website and QIP both make reference to a number of strategic partners which have not been party to this Assessment. Therefore, Haddon Training might wish to consider how such relationships benefit learners, employers and staff. (1.8; 3.6)
- Quality Assure resources so that they are free from errors. Adopting a version control methodology for all resources would ensure that the most up to date version is being employed. (2.2)

- Aspects of the feedback strategy are positive in terms of response rates, methodologies and actions taken following feedback, which staff are aware of. Haddon Training might wish to consider how it could inform partners, employers and learners of actions taken in response to feedback. (4.3)
- Observations of teaching and learning and IAG take place which identify strengths and areas for development. Some observation reports might be considered to be a checklist to ensure performance standards are met, and it is unclear as to what is a strength and what would be normal or expected performance. Therefore, to improve observation of practice and evaluate performance, having a recognised framework might prove beneficial. Such a framework might be based on IAG qualifications or relevant National Occupational Standards. Standardisation sessions might help to ensure consistent application of the framework. Increasing the number of IAG qualified staff might be beneficial. To inject an element of impartiality into the process, external observers could be employed, which might be from a local college, with reciprocal arrangements. (4.5)

The annual **matrix** Continuous Improvement Check will allow the organisation to demonstrate on an on-going basis the developments they are continuing to make in order to support individuals <http://matrixstandard.com/continuous-improvement-checks/> . These may include the Areas for Development above.

Please note that annual Continuous Improvement Checks are mandatory and non-completion within the required timescale will impact on your organisation's accreditation.

5. Methodology

The following methods were used to gather evidence against the **matrix** Standard during the assessment process.

- An introductory meeting with the Chief Operating Officer (COO) and recently appointed Quality Manager, providing an opportunity to review the interview schedule and to gather a picture of the organisation, its provision and challenges
- Discussions with 28 staff, individually or in small groups, to discuss a range of topics, including: their role and responsibilities; delivery of IAG and its impact; continuing professional development; induction; progression; partnerships; and employer relationships
- To consider external relationships, telephone and face to face discussions were held with 7 employer and partner representatives
- Discussions with 19 learners, (including 12 by phone), individually and in small groups, providing an opportunity to discuss the help and support they had received, and their impressions of Haddon Training
- The organisation's website was accessed prior to, and during this Assessment to view information in the public domain
- Informal observations of staff responding to telephone enquiries and discussing support for an individual learner
- A range of supporting documentary evidence was provided, which contributed to discussions. Staff provided clarity as and when necessary. Examples included: the new mission statement and values; strategic and improvement plans; self-assessment report; skills assessments; case studies; recruitment plan; observation reports; promotional material
- Informal feedback was provided at the end of the first and second days
- Decision and feedback was provided to the COO and Quality Manager. Strengths and areas for development were outlined and well received. An overview of the current CIC process was provided.

Conditions of Accreditation

Holders of the **matrix** Standard Accreditation must:

- Maintain and continually improve upon their services.
- Throughout the period of accreditation satisfy Assessment Services Ltd that the organisation continues to meet the requirements of the **matrix** Standard via the annual continuous improvement checks and the three-year accreditation review.
- Complete annual continuous improvement checks in a timely way, it is expected these will be carried out 3 weeks either side of the accreditation anniversary date.
- Inform Assessment Services Ltd or their Assessor if the key contact name/contact details change.
- Submit their Booking Form for re-accreditation to the **matrix** Standard at least 3 months prior to the accreditation anniversary date ensuring all pre on-site activity is completed in a timely way including planning, payment and interview scheduling. Accreditation Reviews are due 3 years from the anniversary accreditation date; it is expected that organisations will be assessed by this date or will risk being de-accredited.
- Inform Assessment Services Ltd of any significant changes made to the organisational structure, senior management or systems that may impact on their accreditation; email: matrix@assessmentservices.com .
- Inform Assessment Services Ltd immediately if they wish to extend or reduce the scope of their accreditation.
- Inform Assessment Services Ltd of any serious complaint or rise in numbers of complaints received (within the scope of the accreditation).
- Not undertake or omit to undertake any activity that may be misleading and/or may cause Assessment Services Ltd and/or the **matrix** Standard to be brought into disrepute.
- Only use the **matrix** Standard Quality Mark for the areas within the scope of the accreditation and in accordance with the guidelines. For example, if a certain department is successfully **matrix** accredited, the Quality Mark can only be used on that department's letterhead or on that department's page on their internet homepage.
- Ensure in cases where accreditation is withdrawn or where they do not come forward for accreditation review, remove from display any certificates or plaques issued by Assessment Services Ltd and do not display the **matrix** Standard Quality Mark nor refer to being a former holder of the **matrix** Standard.
- Be aware that Assessment Services Ltd reserves the right to remove any accreditation and/or certification previously applied if payment is not received for services provided.

Whilst accredited the organisation will be signed up for IAGonline - a community website for all **matrix** holders. Once signed up, any employee of the organisation can join the community and access regular posts and join specialist interest groups for support and discussion.

	
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