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Tracking and monitoring the progress made by work-based learners: Inter Training Services

URN: 52489
Area: Portsmouth
Date published: 13 February 2012
Reference: 120137

Brief description

This example shows how effective use of simple online reporting and well-managed monitoring systems can improve the quality of provision and success rates for work-based learners.

Overview – the provider's message

'It all started with a simple spreadsheet to check we were meeting contractual requirements for progress reviews. However, we were concerned that our success rates were not at the levels we wanted – which was confirmed by inspection! We decided to extend the scope of our tracking systems with the emphasis on keeping them as simple as possible with lots of evidence maintained online and electronically linked. We set up periodic analysis of this information and the improved approach helped staff to manage activities with learners more effectively. Problems were identified and rectified more quickly. It improved everyone's focus on maintaining the momentum of learners' programmes. Learners were enthused and motivated by the progress graphs on their individual tracker. These simple systems – and the way we used them – contributed to our timely apprenticeship rates improving by 20 percentage points in two years and our overall inspection grade moving from inadequate to good.'

Beverley Slynn, ITS Finance and Contracts Manager

Background

This provider caters for about 100 learners on hairdressing apprenticeships. Training takes place on employers' premises. ITS staff provide most of the theoretical training, a proportion of the practical training and undertake routine reviews with learners. In-salon staff supplement the practical training, while assessment is carried out by ITS's own staff or specialist staff in salons.

While trainers/assessors (TAs) were working hard to keep their learners moving through their hairdressing programmes, problems with low success rates remained – particularly timely success rates. It was felt that these problems could be occurring because the TAs were so busy that they were not always checking what stage they had reached with their learners; and also because the training and assessment were salon-based and the TAs were home-based, making it was difficult for managers to help them spot problems.

The use of online reporting and monitoring

To improve provision, ITS developed a range of monitoring systems which have evolved over the past two years. The Excel spreadsheets took less than a week to design and populate with the initial data. This case study explains the main processes.

1. The visit report and monitoring sheet

The process starts with TAs visiting their learners in the salons, which they aim to do on a monthly basis. The outcome of each visit is recorded on a visit report. This is usually completed at the time of the visit by the TA and the learner using a laptop and then sent to a central database. This triggers the first part of the quality assurance system, when an experienced member of the administrative staff checks the report, partly to see that all the expected elements have been completed but also to check if there are any health and safety or safeguarding issues or requests for action that need to be dealt with immediately.

The visit is then logged on a visit monitoring sheet. As well as noting the visit and recording the hours spent at the salon, each entry has a hyperlink to the relevant visit report. To keep things simple, if there is a need to note aspects such as a second visit, or checking of targets, this is done using a comments box rather than creating more columns. The next edition of the sheet will have a running total of hours spent on training which will help with the new requirement to certify that apprentices undertake a minimum number of guided learning hours.

Each month, administrative staff check the monitoring sheet and chase up any outstanding reports – if necessary adding explanations/colour codes to show why a visit was not carried out. A manager then completes a monthly audit to check for any outstanding visits.

The sheet is also used as a trigger for discussions about individual learners at the monthly TA meetings.

2. Learner performance monitoring sheet

The monthly TA meetings also use the learner performance monitoring sheet to spark discussion and instigate action for learners who may need help. Most of the information on

the sheet is entered by the administrative support staff – but there is a useful link with online material. For example, there is a direct link with the Individual Learner Journey (commonly known as the Individual Learning Plan), or the record of action for learners who are receiving specific action-planning; the Learner Intervention Plan. A quick and effective review of learners' status is possible by moving between these links on screen. One particularly useful piece of information is in the column that shows the percentage of the learner's programme completed; this uses the learner tracker which is the next element of the monitoring system.

3. Learner Tracker

Work-based learning providers routinely attempt to record and show learner progress. There is a school of thought that suggests that there is no genuinely accurate system of recording progress because the vocational qualification element is often progressing on many fronts and comes together quickly at the end of the programme. However, ITS has developed a system which at the very least allows comparison between learners and also serves to encourage and motivate them. The learner tracking sheet is a relatively simple system that was designed in-house. It is updated by the TAs with their learners, and is conveniently available online (directly or via the link to the performance monitoring sheet) to allow for management monitoring.

The learner tracker sheet lists the number of planned observations for the vocational qualification programme (for example, 48), and shows when they are completed. In itself this is a helpful monitoring system. However, it also sets out a planned completion rate by simply dividing the programme into equal monthly portions (ignoring the first two months which are for settling in) – so this could be a notional 6.25% for each month of a 16-month programme. Then as each assessment is completed the proportion of the total number of assessments is calculated; so 16 completed out of 48 = 33%. As well as a percentage, which is entered in the monitoring sheet, the system provides a graph of actual against planned progress. Inspectors found that this visual element was used well by learners to show they were on track; or when necessary to help focus the learner and supervisor on slow progress.

Carly Williams, one of the administrators explains: 'I think there are two key points to our systems. One is simplicity so that TAs are happy to use them and we can keep the operational evidence up to date. The second is the electronic linking so that relevant reports are easy to access and give a complete and current picture of what is happening.'

Carly Williams

4. OTL and support visit log

The final system that is used to monitor quality is the log of observations of teaching and learning and support visits for TAs and in-salon assessors. The system is simple and uses hyperlinks so that managers can see the dates of visits and comments about performance (observation reports).

Most work-based learning providers take steps to monitor the activities of their assessors and learners. However, this approach combines simplicity with the effectiveness of online systems and an active approach to using the results for performance improvement.

Reg Lowe

Reg Lowe, the general manager explains: 'We felt we were doing a good job – but somehow weren't getting the results. Our new systems were not that difficult to put in place and they are now embedded in our operations. It helps me, as general manager, keep an eye on learner and staff activity using up-to-date, easily read systems. But, even better, the process encourages TAs – and learners – to identify problems before they escalate. Our improved performance owes quite a bit to this simple management tool.'

Provider background

Inter Training Services Limited (ITS) is based in Horndean, near Portsmouth, and specialises in delivering intermediate and advanced apprenticeship programmes in hairdressing for businesses in Surrey, Berkshire and Hampshire.

Are you thinking of putting these ideas into practice; or already doing something similar that could help other providers; or just interested? We'd welcome your views and ideas. Get in touch here.

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