

Commercial in Confidence



ALLIANCE LEARNING LTD



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1. Assessment Information

Assessment Type	ACCREDITATION REVIEW
Assessor's Decision	STANDARD MET
Assessor's Name	JOHN P G SMITH
Visit Date	15 – 17 MAY 2018
Client ID	C14019
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2. Organisation – Introduction, Aims, Objectives & Outcomes

Alliance Learning Ltd (Alliance), based in Horwich, Greater Manchester, is a company limited by guarantee and a registered charity, offering a range of learning and training programmes. The company has a contract with ESFA to deliver Apprenticeships, including Intermediate and Advanced Apprenticeships, in Business Admin, Customer Service, Childcare and Health and Social Care, and Engineering. Alliance also delivers some commercial offerings in First Aid, Health and Safety and a variety of process updates for the CPD of trainers and testers in the industry. The company has built a large and growing network of local businesses, mainly SMEs, that provide a sound customer base for regular repeat business.

The company vision continues to be *the natural first choice for the workforce of the future. By delivering outstanding teaching and learning, we will meet the needs and expectations of the local economy*, supported by the Mission: *Success Through Learning*.

Since the last Assessment, Alliance has won ESF funding to deliver the Skills Support for the Workforce (SSW) programme; additionally, the Apprenticeship reforms have seen an increase in demand for higher and degree level Apprenticeships, and Alliance have formed a productive partnership with the University of Bolton to develop and deliver Higher Apprenticeships in Engineering and Business and Professional Administration and Management. These developments have enabled Alliance to increase, diversify and further bespoke the range of development and support it is able to offer its customers, including, recently, the Foundation Degree, and the longer term aim is now for the company to be regarded as a ‘One Stop Shop’ for all its customers’ needs. Other changes prompted by the introduction of the Apprenticeship Levy include the decision no longer to sub-contract, and the resulting run-down of the small sub-contractor delivery network, and Alliance no longer sub-contracts for any new starts.

The company is run by the Chief Executive (CEO), who reports to the Board, comprising voluntary members who are senior managers from companies operating in the sectors covered by Alliance provision. The CEO is supported by a small team of managers, who are responsible for Operations, Curriculum Development and Delivery, Project and Contract Management, Quality Assurance and Commercial Delivery, and are supported by teams of Learning Development Officers, sales and marketing, business development, quality assurance and admin support staff.

Alliance programmes, including the Information, Advice and Guidance (IAG) services, are promoted through a variety of ways; the company has consolidated its relationship with a number of local schools, and staff attend assemblies and careers events to raise the profile of Apprenticeships in general and of Alliance provision in particular, and will also offer one to one guidance for students to help them decide if Apprenticeships offer the most appropriate pathway for them. The company holds open evenings for prospective learners and their parents, including tours of the site to see the extensive range of latest technological equipment in use to support learning. Attendance by staff at local and regional careers and jobs fairs also promotes provision, and the company’s membership of key local networks, such as Team Bolton and the Bolton and Bury Work Based Learning Partnership, as well as the Greater Manchester Learning Providers Network, offer additional opportunities for the promotion of Alliance provision, through targeted events and regular updates.

Sales and Marketing teams also initiate awareness and potential business through regular calling to and customer relations management of existing customers and potential new ones, to keep them warm and inform them of any new provision, while delivery staff are also able to promote additional Alliance provision to employers they are currently working with. Provision is also promoted on the National Apprenticeship Service (NAS) website. The Alliance website carries a host of detailed information and updates on provision, and each programme section of the site contains a reference to the IAG on offer, with a link through to the IAG page, where services and their purpose and expected outcomes are described in detail.

IAG is integral to the entire learner journey, and it begins with initial enquiry, when prospective learners can call or drop in to find out about Alliance provision; staff will provide brief explanations and ascertain the enquirer's general interest and refer to staff delivering the particular programme or subject area for further detail. If they wish to proceed they are invited to an initial meeting to explore their options in more detail. Prospective learners can also apply through the Alliance or NAS website, in which case their details are recorded and applicants are invited to the initial meeting. In both cases, where Alliance provision is not suitable, enquirers are referred to other providers.

At the initial meeting learners' short term and longer term goals are explored, along with past achievements, and any additional information identified that may impact on access to or completion of the programme. Candidates carry out an initial assessment of English, maths and IT to ascertain their study level, and their employability skills are also reviewed with referrals to extra sessions on offer if they are likely to need help with CVs or interview skills. Alliance offers a recruitment service to employers with vacancies for Apprentices, in which staff will match individual candidates to specific job roles, prepare them for interview, shortlist and refer them for formal interview to the employer in question, who will make the final decision.

Once a learner is matched to a vacancy they go on to sign up, when all official paperwork is completed, and then to induction with a staff member and a representative of the employer, in which they explore job roles, respective responsibilities, the support on offer and any additional support needs, and complete the Learning Launchpad, which explores use of English, maths and IT in day to day life, preferred learning styles, longer term goals, strengths and any barriers to the achievement of goals, and also how Alliance can support the learner during the programme, all of which feeds into the development of their individual learning plan. Any optional units available are decided on at this stage or can be decided later in the programme if desired. Programmes are mainly delivered on the job with a weekly day release slot at the Alliance centre, when theory, additional maths and English, British Values, Prevent, Equality and Diversity are delivered within the programme. Visits to the centre also allow learners to access any additional support or advice from Alliance staff.

Learners undertake regular reviews with their allocated staff member, and the employer, when progress is reviewed, observations or professional discussions take place, plans updated, assignments set and so on. Throughout the programme staff encourage learners to consider their next steps, and an exit session at programme end aims to ensure every completed learner has identified a progression route, whether to a higher level, FE or HE, another job or more training with another provider. As one learner put it: *We're always talking about careers and what's next.*

Learner outcomes concentrate on the personal well being of learners and are defined as improved confidence, positivity/self esteem, ability to learn from mistakes, healthy and balanced diet, recreational drug free, lack of stress, regular exercise, social and family networks, money management and sensible alcohol consumption. Learners' progress and improvements against these are measured using the recently introduced Ten Point Star; learners self assess against the star at the beginning of the programme and lower scores are picked up by staff who work with them to develop skills and strategies for improvement, regularly reviewing the scores at various stages throughout the programme, with additional support provided if required. The final score, and thus the extent of the improvements registered, is revisited at end programme on an individual basis with each user. No cohort wide analyses of improvements are carried out, but staff commented that improved confidence and life styles, including better money management, tend to be the areas where most positive changes are noted. Learners commented on the ways in which they had developed during the programme: *Helped me do the job better – greater insight; More confident in doing the day to day job; Greater spread of knowledge and understanding.*

The aims and objectives of the service are to *provide quality Information, Advice and Guidance to ensure all learners and employers can enhance their choice of learning, career, work and life goals; and to support learners through IAG in getting into learning, getting on in learning and moving on from learning.* These support wider Alliance aims and objectives to meet contractual targets and KPIs and underpin the Mission and Vision. The success of the organisation in meeting these is measured in a variety of ways. The Board meets monthly, informed by detailed reports from the CEO on performance, developments, changes in policies that could impact on the company, and updates on quality, safeguarding and Prevent. The management group meets in a weekly 'huddle' to review overall performance against targets, learner achievements, issues impacting on delivery and development, and so on, and there are also weekly huddles for Operations, Project and Business Development manager groups, to reflect on and review these matters.

Monthly team and group meetings look in detail at their own performances against targets and are also able, with the help of the OneFile system, to drill down into individual learner progress and to identify at risk learners in order to address the cause of the fall back, whether a personal issue for the learner or external factors or workplace difficulties. Since the last Assessment the number and frequency of cross-team meetings, or instances where staff members sit in on other team meetings, has increased, as the need for coherent and synchronised support has been recognised through improved recording on OneFile. Another recent development, which has improved communication within the company, has been the quarterly staff briefings, in which all staff are updated on the current position of the business, quality matters, strategic issues, developments being implemented, staff achievements and issues impacting on the business.

Review of recent analyses highlights overall achievement rates for the last full year at 80.41%, with timely achievements at 72.46%, in each case an improvement over the previous year. The progression rate into full time employment for the current funding year so far is 84.8%. Further analyses show 86.7% of previous learners are still employed by the company that provided the Apprenticeship, 4.05% had found new employment, 4.05% had progressed to FE, with just 5.2% unemployed.

All staff are involved in the planning, review and quality improvement arrangements, through the approaches described and through the business development process, in which demand levels and enquiries about new provision from existing and prospective customers, consultations with this group as to likely future requirements, impacts of Apprenticeship reforms on delivery processes.

Strategic links through various networks to the Greater Manchester Combined Authority gives access to LMI on current and future skills needs to help shape provision, and all this data feeds in to the creation of programmes and ensuring that resources are sufficient to deliver effectively and to standard. These factors also feed into the Business Plan along with strategic input and oversight from the Board.

The Self Assessment Review (SAR) and resulting Quality Improvement Plan (QIP) are developed at team level in the first instance, and take account of consultation with stakeholders, employers and learners as well as staff. The components are collated into a single document by the Operations Management Team, and progress against improvements identified is monitored, and the plan updated, via the methods described. On a day to day basis, all staff are encouraged to implement changes and improvements to make provision more engaging, relevant and effective, and to come up with ideas to improve the business – *We're all encouraged to take risks – mistakes are not viewed negatively, because you've tried it.* The development of the Enterprise Resource Planning (ERP), a system to improve inter-team communication and co-working, ensure all parts of the business are in synch and that duplication is avoided, has been highly successful in identifying areas for improvement and in making systems much more efficient and cost-effective.

Other quality processes include staff supervision and observation of learning and assessment, the annual performance review and regular one to ones with line managers to review learner progress and issues for staff requiring action; staff development and CPD are major strengths of Alliance, with all undertaking significant amounts of development, training and updates on data protection, safeguarding, British Values and so on, along with formal qualifications. And as demand for particular provision fluctuates, staff affected are retained and redeployed to other subjects, with appropriate development, thus maximizing use of resources and demonstrating significant loyalty and commitment to staff. Internal quality assurance ensures programmes are delivered to awarding body standards and that staff are adhering to required processes, while standardisations ensure all are delivering consistently and help to develop approaches for accommodating any changes required, while external compliance audits from ESFA, regular reporting on recruitment and learner progress, and close contract scrutiny by the Alliance team, ensure the company is meeting its obligations contractually.

Feedback from learners and stakeholders is also actively sought, as are the views and inputs from staff; this has seen a major increase in emphasis as Alliance strives to learn as much as possible from as many sources as it can about ways in which it can improve. Learners are able to feedback in group sessions or one to ones, and through regular surveys, while employer feedback is gathered through ongoing engagement and at learner reviews, as described. Staff feedback is gathered through staff meetings and informal gatherings.

As a result of these approaches, a large number of improvements has been made, such as: offering new commercial courses in Safeguarding and Mental Health Awareness, Functional Skills and Operating in Confined spaces; development of a day-release model to meet the new 20% Off-The-Job requirements for the new standards; putting on breakfast meetings for employers to help them understand the Levy arrangements and their implications; changes in delivery methods and techniques to keep provision fresh and to adhere to standards; creation of a smoother IAG process, with text reminders of appointments and alerts to new vacancies.

Additional improvements include provision of separate joining instructions for employers and learners; creation of a referral guide and status journey on the intranet; an extended staff induction to enable recruits to absorb all the information and avoid overload; introduction of joint OLA and Team Leader observations to ensure teaching and learning techniques as well as technical knowledge are appropriate; cessation of grading staff performance by individual sessions and switch to an overall annual grade; techniques graded as good practice become expected practice within a year; working with an employer to bespoke a qualification to a newly created job role; providing safeguarding training for learners' managers;

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.

- The IAG on offer at Alliance continues to be of high quality and thoroughly effective in raising the aspirations of learners, meeting and supporting their needs and helping them to progress. IAG is ‘threaded through’ everything the company does, is fully learner centred, integrated, and involves all staff supporting and recording their every intervention; its positive impact is reflected in the positive learner achievement and progression statistics, showing a year on year improvement. (3.2)
- The quality assurance and continuous improvement arrangements are comprehensive and thorough and include: close monitoring of staff performance, with targets linked to Alliance wide KPIs; emphasis on staff training, development and progression, with many examples of how staff had taken on greater responsibilities and expanded their roles; an ethos of actively seeking and acting upon feedback from all sources, with many examples of improvements resulting from this approach; an atmosphere of innovation, supported by active encouragement to all to take risks; and the increased development and expansion of IT systems, including OneFile and in particular, the ERP process, which have led to increased efficiency and improved processes. (1.7, 2.1, 2.4, 4.3, 4.5, 4.7)
- Exceptional internal communication, including regular whole team briefings to ensure all are aware of the current position and the issues facing the business, and increased cross-team meetings that share valuable information, along with numerous informal gatherings, fosters an environment of inclusivity, in which all are valued, and all are involved in the quality assurance and business development and improvement processes. (1.2)
- Partnership and networking continue to be a major strength of the organisation, with links at many levels to external partners supporting strategic and business planning, curriculum development, marketing and promotion, practical support for learners, including, through the Partnerships in Engineering, donations of equipment and kit for the Training Centre, inward and outward learner referral opportunities, and delivery of the company’s community responsibilities, alongside regular good practice sharing and joint development of provision, and a growing cohort of quality assured, satisfied customers who bring repeat business to the company and provide a range of development and employment opportunities for learners. These partnerships all support the longer term ambition of Alliance to become a ‘One Stop Shop’ for its customers by offering, or providing access to, a full range of provision to meet a wide variety of staff development needs. (1.8)

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 ongoing 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.

- As mentioned, Alliance has a wide network of regular customers, many of whom are willing contributors to promotion and learner development, and the company may wish to consider engaging some of them to undertake mock interviews for learners, to give them exposure to real life scenarios and to help bring home the skillsets and personal qualities employers are looking for. (1.8, 2.1)
- During the Review feedback from some learners suggested that in some employers the development and support for those who have completed their Apprenticeships may not always continue; Alliance will no doubt wish to expedite its exploration of the efficacy of introducing a post-Programme commitment arrangement equivalent to the current in-Programme commitment. This would help ensure that development and progression opportunities continued for learners who have completed the formal programme, and would add to the already robust quality assurance arrangements for employers taking Alliance learners. (4.5)
- Throughout the Review Alliance demonstrated its strong commitment to quality assurance and sound governance, and the company may wish to consider seeking accreditation to the Leadership and Management standard, or the bespoke '**matrix** Plus' option; this would provide further evidence of the exceptional leadership and inclusion ethos within Alliance Learning. (4.8)

The annual **matrix** Continuous Improvement Check will allow the organisation to demonstrate on an ongoing 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.

Visit to the Alliance Learning Headquarters and Training Centre at Horwich Loco Estate

Interviews with one Board member, one manager and two members of staff

Group interviews with a total of three senior managers, five managers, twenty eight members of staff, and seventeen learners

Telephone interviews with seven partners and seven learners

Review of key documentation, including the Alliance Learning Business Plan, SAR/QIP, learner documentation, evaluated feedback, performance reports, and the Alliance Learning website

Feedback was provided at the end of each day to the Acting Chief Executive and the Projects, Contract and Quality Manager, and to the Acting Chief Executive and five managers at the end of the Review

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@assessmentsservices.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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