

# Final Report

---

Accountancy Plus (Training) Ltd

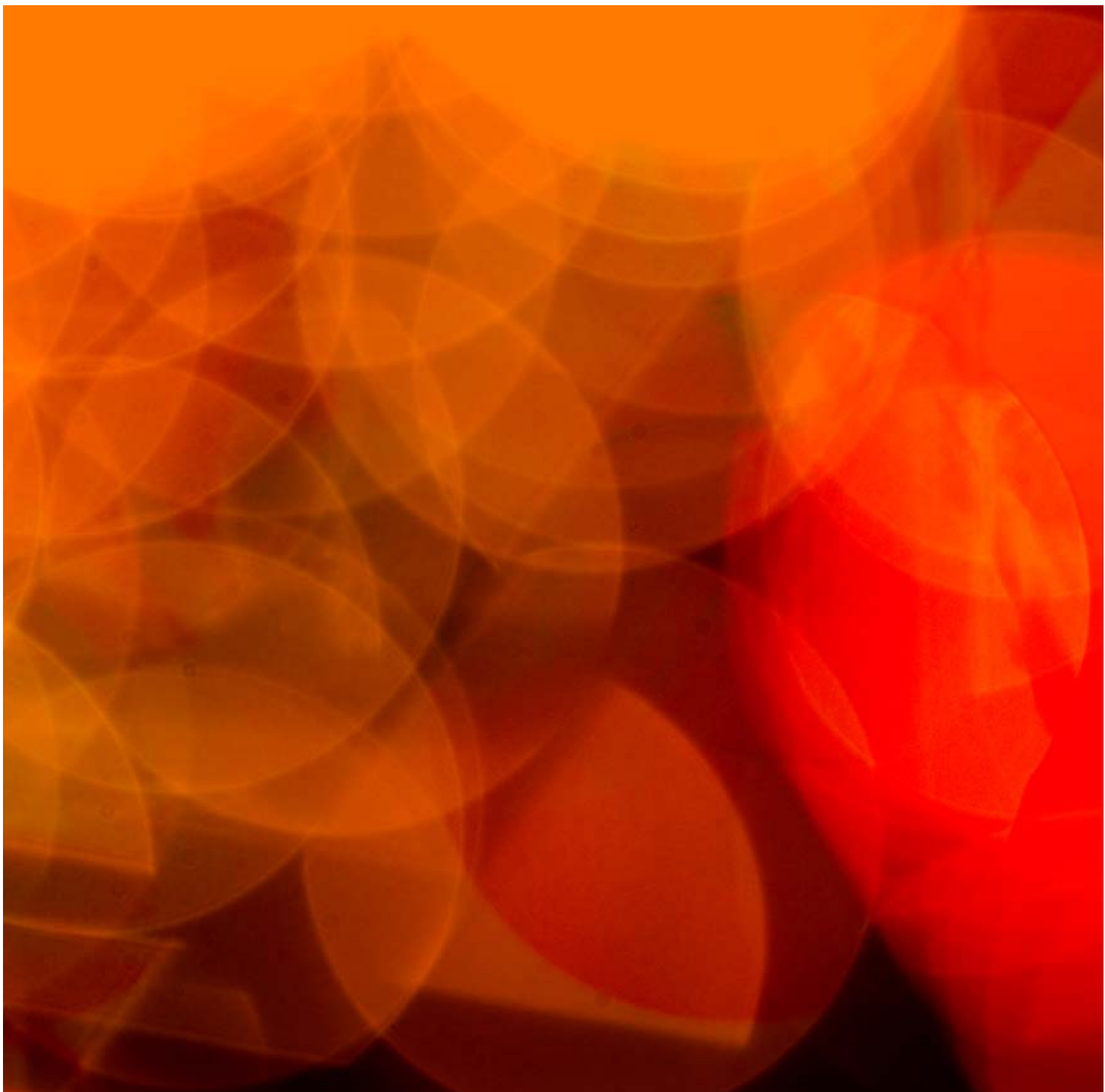
Supporting Assessors in Developing Employer Responsiveness

---

WCS

World Class  
Skills Programme  
Developing Responsive Provision

LSIS LEARNING  
AND SKILLS  
IMPROVEMENT  
SERVICE



# Developing Assessor Employer Responsiveness

## Paul O'Connell

### 1.0 Project Overview

#### 1.1 Purpose of the project

Please provide the following:

- a description of the project and the expected outcomes of the project.

#### Project Description

This project set a number of aims in order to improve employer responsiveness. These were to engage assessors in driving up progression rates, being able to cross sell non-accounting products and improve timely completion rates.

### 2.0 Outcomes of Development Work

#### 2.1 Key activities and related findings

The aim of this section is to detail the main activities that have been undertaken as part of this project and the key findings that have emerged. Please give:

- a brief description of the activities carried out followed by some detail on the progress that has been made as a result
- the key findings and recommendations that could be made to other providers as a result of the development work
- any issues and challenges which arose and how were these overcome

#### Development Plan summary

The Thematic Development Plan identified nine good practice indicators (GPI). Four of these were considered as priority:-

- Have a Timely Success Rate of 80% or more for all provision (GPI 3)
- Learner progression onto higher/additional learning programmes is more than 40% (GPI 6)
- At least 50% of employers who are new clients request training for additional employees (GPI 8)
- Assessors are conversant with the current provider offer and LSC eligibility criteria (GPI 9)

## 2.1 Key activities and related findings

Good practice indicator	Key Activities	Findings
Timely Success Rate (TSR)	<p>The following were considered key:-</p> <ul style="list-style-type: none"> <li>• Establish an assessment team to co-ordinate the assessment procedure</li> <li>• Allocate a maximum number of pieces of work to each assessor</li> <li>• Create a control sheet for monitoring of student progress</li> <li>• Appoint two admin assistants</li> </ul>	<p>The disparity between achievement of learners and timely achievement had led to a severe backlog of learners who while having passed their exams some as far back as 2007, had not completed their coursework. The backlog has largely been cleared although the tangible evidence will only be seen in the next contractual year.</p> <p>Of the activities that were felt to be key, it was the establishment of a control sheet, which led to the greatest improvement. This effectively led to the creation of Hit Lists – one the ‘Old’ Hit List for those that had fallen behind their target completion date, the ‘New’ Hit List for those with expected target dates in August/September 2009.</p> <p>The Hit Lists have proved an enormous success. Assessors are updated daily on progress via Moodle. In the immediate aftermath of the June 2009 exams, a decision was taken to establish Hit List teams. Each team consists of about 5 assessors, all with their own individual personal tutor list of students. Each team is lead by one of the directors and the pooling of resources and teamwork has seen a rapid rate of assessing being undertaken.</p> <p>To enable assessors to undertake more assessing the appointment of the two admin assistants has helped significantly. Funding paperwork is gradually being released from assessors. A feature for future benefit will be that admin staff will have a greater role in the sign up process for learners; some 15 staff are being trained to undertake health &amp; safety training monitoring of learners work establishments. This will free up assessors for more assessing/teaching.</p>

		<p><b>Conclusion:</b> While our actions have not followed the activities that we felt would bring us to our goal, we feel that the advent of teamworking for Hit Lists gives a sound foundation to ensure that our high achievement rate is now achieved more timeously. As well as satisfying learner/employer expectations it will also improve cashflow!</p>
<p>Learner progression to higher/additional programmes &gt; 40%</p> <p>Increase engagement in learning from new employers</p> <p>Assessors are conversant with product range, courses and LSC funding availability</p>	<p>The following were considered key:-</p> <ul style="list-style-type: none"> <li>• Identify and analyse those learners expected to progress to the next level</li> <li>• Identify top 3 clients per personal tutor and outcomes that could be generated.</li> <li>• From this top 3 identify personnel who will undertake the client management role</li> <li>• Conduct employer visits</li> <li>• Compile and circulate for assessors (in fact all staff) details on products, courses and funding</li> <li>• Training sessions on products, courses and funding</li> <li>• Supply stock of marketing materials</li> <li>• Observe sign up visits/exit interviews to ensure opportunities for cross selling/progressions are not missed</li> </ul>	<p>These three GPIs (6,8 &amp; 9) have been the focus of attention but as above not in the manner it thought likely in the Development Plan.</p> <p>The Business Development Manager (and lead for this project) left A+ on 17 April. Since then her role has been absorbed by one of the new directors with responsibility for communications.</p> <p>Barriers to progress have been time, new staff coming on board and needing supervision and direction, other staff changes/sickness, resulting on the focus in this area being less than was hoped for.</p> <p>However some progress has been made.</p> <p>We now have in place professionally designed information sheets for all the non-AAT programmes that we are running – we have something tangible to hand out to employers.</p> <p>We have set up client manager roles for large employers in the public sector, with quarterly meetings to review progress and plan future delivery.</p> <p>The commercial manager has undertaken pro-active visits to employers in the west of our region. In addition, he has established a placement register to place would be apprentices with local businesses. In these difficult economic times, we are seeking to keep open opportunities for apprentices to meet the eventual up turn in the economy and thus have a ready supply of trained staff to meet employer requirements.</p> <p>We have also taken the step to go beyond our comfort zone on accounting programmes! The reality is that</p>

		<p>progression from one level to the next on AAT is expected as the norm by learner and employer alike. Achieving a 40% progression rate in our sector has never been an issue. Where we have not responded in the past is to the fact that around 50% of our NVQ4 learners progress to the professional exams of the chartered accountancy bodies. With effect from September 2009, we shall be delivering the ACCA qualification in Exeter. By releasing staff from other commitments, we have been able to develop a programme to meet the clear demand for local provision of this qualification.</p> <p>At taught courses, visits to employers and mailshots, the message has been going out that we will be running this course. We also intend targeting employers with whom we do not currently have any relationship.</p> <p>Another development has been to offer the ATT qualification for those learners particularly in practice who wish to expand their tax knowledge; this too commences in Exeter in September 2009 and an active campaign has shown a healthy level of enquiry and interest.</p> <p>While time has been a major constraint in being able to cross sell products, there has been some notable success in the area of SfL. For adult learners the chance to brush up on maths skills ahead of an engagement on a full NVQ programme has given confidence and enabled a gentle easing back into learning after what is likely to have been a considerable period of absence from a learning environment.</p>
--	--	---

## 2.2 Production of case study

Please describe:

- What format will your contribution to the sector outputs (case study) be taking?
- What is the rationale behind this?

See separate Case Study attached, **“Targeting timely completion of learners”**

## 3.0 Conclusion

### 3.1 Overall impact of project

Please provide:

- A summary of the overall impact that the project has had on your work in this area
- Your perception of the project as a whole and comments on how the process could be improved in the future

The project has served to focus our attention on employers needs. Those needs are not just employers but their staff too and of course ourselves. The most tangible benefit has been the success of the Hit List teams, this has served to drive up completions and for the next contract year we expect to be on track with timely completions. Satisfaction all around; the learner gets their qualification, the employer has a more qualified and therefore more productive member of staff, we get paid for keeping the learner on track.

In the six months since we embarked on the project we have had to adapt to change. Our business needs have been focussed on the completion of learners. While major structures have been put in place to carry this forward we now need to look at the development of future engagement of employers. We need to be realistic as to which personnel are best placed to engage employers. The barrier of current assessor staff being reluctant to ‘sell’ to employers will be overcome, with senior staff being freed up to perform the engagement process in support of the commercial manager.

In hindsight, we probably set ourselves too challenging a series of targets. Personnel changes brought with it additional learning curves and staff involved in the initial phase of the project were not involved as the project developed.

Part of our expectation was to receive training for all staff on sales awareness; this is still outstanding and it is hoped will be made available before the project’s conclusion.

### 3.2 Next Steps

Please provide some detail on how you will build on the development work carried out to date.

Our next steps are to involve two of the directors to assist the commercial manager in promoting the increase in course, qualifications and products that we now offer. We have AAT established, we now need to get out to our employer network (and beyond) and let them know about our new areas and as always advise them on what funding is available to them.