

LSIS funded Improving training and related services for employers

PROVIDER END OF PROJECT REPORT

**Project title: Driving commercial training in the schools sector
Training and learning together**

Section 1: Introduction

(Give a brief introduction to your organisation and the project.)

STAR (Training and Consultancy) Ltd was established in 2000 and is a small private training provider, which specialises in training school support staff including Teaching and Learning Support Assistants, School Administrators, Parent Support/Family Liaison Advisors and Mid Day Supervisors.

The project's focus was to increase STAR's ability to deliver high quality training to generate more income from employers through the development of three key areas.

- Developing staff expertise in marketing and employer engagement.
- Developing more innovative delivery methods and learning materials, reducing delivery costs and subsequently reducing fees for customers.
- Developing a robust customer journey in relation to distance learning.

Please explain how and why the project emerged?

Over the last 11 years, STAR has accessed a range of government funding from both the Skills Funding Agency and Local Authorities, which has heavily subsidised learners and employers to access our training and qualifications. Over the last year or so, some of this funding has ended. We recognised that the government's priorities are no longer with employed people aged 25 and over, which is the vast majority of those employed within the school sector. We therefore knew we needed to diversify our income streams and attract more privately paying learners and employers to grow our business.

Our primary focus until recently was to offer high quality learning programmes leading to nationally recognised qualifications, which met the requirements for funding. This involved offering a programme of intense face-to-face support for our learners on their employers' premises. Both our research and very high customer satisfaction ratings informed us that this method was what employers, learners and our funder's wanted. However as this method of delivery is very costly our course fees were high. The delivery method we used also restricted the geographic area that we could deliver in to Yorkshire and parts of the North East, or to only very large groups of learners from other areas.

Because of our high delivery costs, we found that many employers and learners said they could not afford to undertake the training with us. Also, as a result of our delivery model, we turned down the opportunity to recruit single learners from wider geographical areas.

We therefore decided that in order to maximise the opportunities for growth in commercial training, that we needed to change our delivery method to reduce the costs to employers and learners, and make our programs more accessible to a wider range of employers and learners across the country. With this in mind, we decided to offer and market our courses using a distance learning delivery model.

Research into the competitors in the distance learning market suggested that many providers were offering distance-learning packages for school support staff, but few were offering full nationally recognised qualifications. We know from our research and experience within the sector that the nationally recognised qualifications are highly valued by employers. They are used as criteria for recruitment, and are therefore desired by learners. We therefore decided that we would continue to offer the full qualifications via the distance learning method.

Changing to this new delivery method and how we market our courses required a lot of work and care to ensure that we retained the quality we have always strived for.

What are you trying to achieve within the project?

We set four main objectives for the project:

- To increase the level of employer contributions for training by 100 per cent in 2011-2012 in comparison to 2010-2011.
- To develop high quality distance learning programs which will reduce the cost of training to employers and learners, whilst continuing to meet the demands of the school support staff sector.
- To achieve a minimum of 85 per cent customer satisfaction from both learners and employers across all programs.
- To make all schools nationally aware of STAR and its products and services, and increase market share by delivering to learners outside of Yorkshire and the North East.

Section 2: Activities

Who has been involved? (Departments and/or job roles)

As a small organisation employing eight staff it was very important to have all staff supporting the project and involved in the new delivery model to maximise its long term success. All staff have been involved including the senior

management team, trainers/assessors, administration and an external associate employed to assist us with our ICT requirements.

What's happened so far?

We reviewed the customer journey to reflect the requirements of the new distance learning delivery model. All staff were involved in this process and we utilised the initial feedback from our learners and employers.

All staff have been trained to market and respond to employer and learner requests for commercial training. This has included training the administration team to be able to respond to incoming employer and learner requests for information regarding courses, including providing quotes and proposals. The assessors have been trained and equipped with resources to market all courses and the new delivery model to existing employers and learners. This includes identifying buying signals and using non-invasive questioning techniques to uncover needs. The senior management team have been trained in using Google Adwords and Facebook advertising.

Various methods of marketing have been trialled including e shots to all schools nationally and Google Adword campaigns., The website has been updated to increase search engine listings, to sell training that is more commercial and to allow users to navigate it more easily and make enquiries online.

We have created a number of resources including knowledge packs and assignments for each of the qualification units and have uploaded these to our existing candidate support system, **2develop**.

What has been achieved?

Three of the four objectives we set for the project have been fully achieved. The objective to increase income over the academic year is on track and is expected to be achieved by the end of the academic year. The activities have that have taken place to achieve the objectives are described below.

Objective 1. *To increase the level of employer contributions for training by 100 per cent in 2011-2012 in comparison to 2010-2011. For the academic year 2010-2011 we collected employer contributions of £18,500.*

Administrators are now able to deal with enquiries for training, provide quotes for fees and book individuals onto courses. This has helped considerably over the last couple of months as it has enabled us to deal effectively with higher enquiry volumes. This has allowed the senior management team, who would normally deal with all enquiries, to undertake more employer visits and spend more time focusing on developing programmes.

Assessors are able to effectively promote all learning opportunities that STAR can provide; they have developed their understanding of our products and

services, delivery methods, prices etc. They have developed their sales techniques to promote new offers to employers through questioning and referrals. Since their training in February, they have provided a number of leads for higher level (level four) programmes in management and business administration.

The management team has tried new marketing methods and has learned what works well and what does not. The e shots to schools have been the most successful marketing method to date, using plain text rather than html. More detail on the marketing methods trialled is provided in the report section overcoming the challenges. We are still refining and trialling more marketing techniques and we see this as an ongoing process, but what we have learned so far is allowing us to focus our efforts to generate more enquiries and business.

The menus on the STAR website have been restructured to place more emphasis on commercial programmes and less on government funded programmes. The pages that promote training have been structured by job roles to make them more targeted for individuals and to enhance search engine results. For example, previously there was one page for all school support staff courses. We have now created separate pages for Teaching Assistant courses, School Administrator courses and so on. We have also added enquiry links to each page.

As a result of our activities, enquiries for commercial programmes have increased by over 100 per cent this academic year in comparison to the last academic year. Learners undertaking commercial programmes have increased so far this academic year by over 300 per cent. In 2010-2011, ten learners undertook programmes that were fully paid for by them or their employer. So far this academic year, 37 learners have been recruited. The income generated to date in this academic year from commercial programmes is £30,000 (March 2012) compared with £18,500 for the last academic year. We expect that by the end of August we will have more than met our target of increasing revenue by 100 per cent.

Objective 2. *To develop high quality distance learning programmes which will reduce the cost of training to employer's whilst continuing to meet the demands of the school support staff sector.*

We held an initial meeting with the senior management team and assessors to go through the qualification standards to discuss how we could meet the awarding body, learner and employers requirements and deliver the nationally recognised qualifications via distance learning. We then looked at the customer journey from start to finish and agreed what changes needed to be made to the process to make it work for distance learners and their employers.

We knew from feedback from our government-funded programmes that learners and employers value a personal service. Learners who build strong relationships with their assessors frequently want to continue in learning

following their programme and are more likely to recommend us to others. We therefore wanted to maintain a personal service even though we would not be seeing learners and employers face to face.

We decided to keep a number of elements of the existing customer journey in place for our distance learning programmes. This included providing a named assessor who could be contacted at any time via phone and email and would provide structured targeting of outcomes for learners. Formal records of support are kept so learners and employers know what has been covered, where candidates are up to and what they need to do next, with agreed deadlines. We reviewed all of the documentation we use for our funded programmes and kept what would be useful for distance learners, discarded what would not and revised the documentation including employer guides and induction packs.

We developed workbooks for all of the mandatory units and a selection of optional units for the qualifications including Supporting Teaching and Learning in Schools and Business and Administration. We also developed handouts, booklets and recommended reading lists to develop learners' underpinning knowledge. All of these resources have been uploaded to **2develop** our learner portal, which was previously only used for initial assessment. Learners on distance learning provision now have a structured programme and some support 24/7. These documents have been made available to all of our learners and so we are enhancing the support in all delivery models.

The availability of online support materials reduces the amount of time that assessors need to spend with learners explaining things and teaching. The materials also make the marking process more efficient as they provide a more standardised structure to a portfolio and are referenced to the standards.

We calculated the costs involved with distance learning working out a package for assessor support via phone and email, the awarding body costs etc. We found that we could reduce the cost of our programs to employers and learners by over 50 per cent by delivering in this way. We also now offer an enhanced distance learning package where learners get some face-to-face support in addition to the distance learning support. This method still saves over 30 per cent of our previous costs.

Objective 3. *To achieve a minimum of 85 per cent customer satisfaction from both learners and employers across all programs.*

We measure learner and employer satisfaction through interim and end of programme evaluation forms. Whilst we have still yet to complete our first distance learners, the interim evaluations show that 100 per cent of learners and employers are satisfied with the programme delivery so far against all aspects.

Objective 4. *To make all schools nationally aware of STAR and its products and services and increase market share by delivering to learners outside of*

Yorkshire and the North East.

We have compiled a mailing list of all the schools in the country and are emailing information to them once a month. We now have learners spanning the entire country including from London, Wales, and Devon. We think we have increased awareness of our company and what it offers and have extended our market share.

Section 3: Success factors and challenges

In this project what have been the critical success factors (up to three) and why?

We feel that the critical success factors have been as follows.

1. Getting the involvement and commitment from all staff, ensuring that they understand our targets and how they contribute to meeting them. Without all of the staff being committed to helping us, and without ensuring that they were provided with training and understanding to assist them achieve our goals, we would not have fulfilled these initial objectives and be able to build on them long term.
2. Trialling different marketing methods to find out what works and what does not with employers and learners. This is now enabling us to build on the successful methods to continue to bring in further commercial business.
3. Developing the customer journey and the new support materials using the feedback from all staff and customers to allow them to shape the delivery. We continue to gain feedback from our learners and employers, and this will allow us to perfect the journey and adapt it ongoing to meet emerging needs.

What have been the key challenges? (up to three)

The key challenges have been:

1. Developing the skills and confidence of staff to 'sell' training - in particular with the administration team who had very little experience of speaking to learners and employers and who were very nervous about this.
2. Evaluating what marketing methods worked within the sector and what did not.

And how did you overcome the challenges?

Developing the skills and confidence of staff to 'sell' training

We started by providing interactive in-house training with, for example, role-playing to develop staff knowledge and confidence to promote courses and respond to enquires.

We provided many aids to assist staff with the promotion of courses. This included a table matching different school support staff roles to appropriate qualifications for these roles with progression routes, so the team could clearly see which qualifications would be most appropriate to respond to enquiries.

We provided a frequently asked questions (FAQ) sheet with example answers of how to respond to questions.

We also provided the staff with qualification flyers so they had information on the delivery, course syllabus etc, price lists and referral forms and more.

Following the training, we provided mentoring to assist the staff to implement the skills. This included the staff listening to calls from employers to see how they were usually handled, then taking calls themselves with a manager observing and encouraging responses.

The staff have been positive about the process and have been excited when they have converted learners onto programmes.

Evaluating marketing methods

We have tried a number of different marketing methods including Google Adwords, website advertising and e-shots. We tried methods to target both employers and individuals, as we were not sure if our courses would be mainly purchased by employers, learners or a combination of both.

E shots

We spent a lot of time compiling a mailing list of all schools in the country. Head teachers often change and are always very busy and there is no standard person in a school who looks after staff development. We therefore decided it would be best to send the mail shots to the administration accounts and then if possible to change our lists once we gained the appropriate personal contact details.

We initially tried sending colourful HTML emails to all schools as we felt that this would look more professional. The emails included links to our website pages to enable viewers to find out more about particular courses. The responses were very limited and those that did respond were mostly asking for more information by email. We then tried sending out plain text emails with a poster in an attachment that could be printed and put in the staff room at school. This method has worked much better.

The plain text e shots have been the most successful form of marketing to date with over 75 per cent of our conversions coming through from this method.

Google Adwords

We decided to use Google Adwords to enhance the searchability of our courses to anyone that was looking for school support staff training. We created a number of adverts and, with the help of the administration team at Google, learnt how to make sure our adverts matched users' search requests.

For example, if the user typed in the term 'Teaching Assistant Training', our advert would display this text. However if the user typed in 'Teaching Assistant Qualification' or 'Course' it would display this text instead.

By selecting appropriate search terms, we can ensure we only attract the correct kind of enquiries. For example, if a user puts in 'teaching assistant training', our advert comes up in the search results but if a user puts in 'teaching assistant jobs' it does not. This has taken some tailoring as initially we were getting many enquiries around training to be a teacher rather than a teaching assistant.

The adverts are quite costly per click but are very targeted. They have generated many hits to the website but not very many enquiries. The enquiries that they have generated are mainly from individuals who want to be teaching assistants rather than from schools wanting training for their staff or from staff already working within the sector. We do not think that this method has been very effective for the courses we are offering at the moment, as candidates must be already doing the role in order to meet the assessment criteria for the National Vocational Qualifications. We have therefore had to turn away business from those that are not working or volunteering in schools. It has, however, made us see the potential for a new market and we are considering designing a knowledge-based in-house accredited course which could later be topped up to the full qualification once the individual is working in the sector.

Section 4: How has something changed?

What difference has the project made?

What impact has the project had so far (for learners, staff, employers) -or what impact might it have?

Learner impact

The new delivery has:

- reduced the cost of courses to learners;
- removed barriers to learning by learners being able to study in their own time - at times most convenient to them; and
- ensured that learners receive a high quality programme with different types of support available (phone, email and online support materials, textbook) to suit all learners' needs.

The impact of the programme is:

- more learners can afford and can access a nationally recognised qualification which will support their job role and career progression;
- learners develop new skills, knowledge and confidence in their role; and
- more learners will be qualified and can enter paid jobs in the sector.

Employer impact

The new delivery has:

- reduced the cost of courses to employers;
- removed barriers to releasing staff for training, allowing more flexibility

- for study; and
- made it more accessible for employers to have staff who hold professionally accredited qualifications.

The impact of the programme is:

- employees develop new skills, knowledge and confidence in their role which enables the school to meet its objectives and keeps pupil and parent satisfaction high; and
- the standard of pupil support in school is increased.

Staff impact

- Staff are more confident to deal with employer and learner requests.
- Staff are equipped with the skills to be able to generate more income.
- Staff feel valued and can see the contributions they are making to the organisation.

Organisational impact

- Revenue is increasing, making the organisation more sustainable in the longer term.

How are you measuring the impact?

We measure the impact to employers and learners through an objectives and impact form, which is completed at the beginning and at the end of the programme. This asks employers and learners to identify their objectives and areas where they would like to see an impact at the beginning of the programme and confirms at the end what has been achieved. We use this for both employers and learners where the employer is paying for the course, but only for the learner if the learner is paying for the course.

We also use interim and end of programme evaluations for learners and employers. As the distance learning delivery method is new for this academic year we have yet to complete any learners. We therefore currently only have interim feedback from 14 learners. The graph overleaf shows learners responses to the interim evaluations, which are completed approximately 12 weeks into their programme.

The initial feedback shows that learners are receiving good or excellent support from their assessors and most learners have commented on this. A few learners have only found the materials satisfactory and on investigation learners said they found some of the unit workbooks/assignments repetitive. We are revising the workbooks and assignments over the Easter break, so hope the future evaluations will all be rated as good or excellent.

We keep a record of all enquiries, including where the lead came from and conversions from enquiry to take-up to measure our success rates.

So far this academic year we have received 90 enquiries for distance learning programmes, 37 of these have converted, a conversion rate of 41 per cent.

Of the total enquires 68 have come from the e shots to schools (75.5 per cent), seven have come from the website through Google Adwords (7.7 per cent), seven have come from assessors (7.7 per cent), eight have come from other course search engines including the TDA and CWDC website (8.8 per cent.)

Section 5: Reflections on learning

What changes did you make as you went along and why?

We are still learning and making ongoing changes to the programmes. The materials that were created for the units, including the workbooks, have now been in place for a couple of months and both assessors and learners have provided feedback on some areas which could be changed. This includes questions where the learners do not understand the phrasing and some repetition. We are utilising the Easter break to make amendments to the workbooks in line with this feedback.

We have changed the way we email marketing from HTML emails to plain text as this generates a better response from schools.

What has worked well?

The staff training has worked well and we now have our first learner conversions from the administration and assessor teams.

The plain text e shots with posters to schools have been the best marketing method trialled to date.

The materials available for learners and the textbook are working well.

We recognise that one of our strengths is that we are consistently asking for feedback and making changes to continue to improve, and this will be ongoing after the project.

What needs improving?

In order to ensure that learners and assessors do not become confused by any ongoing changes to materials we need to set up a formal process for reviewing these and communicating any changes to learners.

If you did this project again what changes might you make?

We are very happy with our achievements during the project and we have met the original objectives. However we need to continue to build on this and our overarching aim is to become non-reliant on government funding for our courses long term.

We have identified though the project a potential demand for non accredited distance learning courses which can then be built on to achieve full qualifications. We are investigating this.

Section 6: What learning and outcomes from the project could be shared with the wider sector?

What else could be useful to capture what's coming out of the project?

The initial research we conducted to find out if there was a demand for distance learning programmes within schools was undertaken with existing employers and learners on face-to-face programmes. The research results informed us that distance learning was their least favourable way of undertaking a qualification and that many would not do it through distance learning. However, we were also getting feedback that employers and learners could not afford our face to face courses. We therefore decided to develop a distance learning route and try it as an addition to our face-to-face provision. It has been a success.

Our advice to other providers would be to not assume that employers and learners will not pay for training, to think “outside of the box” and try new delivery and marketing methods to learn what is good for the sectors they are working with.

To ensure maximum conversions of learners, ensure that all staff in the organisation are aware of the organisation's objectives and are equipped with knowledge of all products and basic sales techniques to be able to engage with employer and learners.

What resources will be created that would be useful to share?

Whilst the resources that we have developed are very sector focused and qualification specific, other providers may find these documents useful to follow our approach so they may replicate these to suit their own organisations and qualifications. The resources that we have developed include the following

- Distance learning customer journey (see resource 1a)
- Distance learning induction pack.
- Employer guide.
- Evaluation forms.
- Workbooks and knowledge packs for qualification units for Supporting Teaching and Learning in Schools .
- Staff training agendas and materials poster (see resource 1b)

How could we use the learning from the project to drive forward the Further Education and Skills sector?

It is important that the education sector communicates the value of training to employers and learners and does not assume that employers and learners will not pay for training. Over the past few years a number of providers have promoted ‘free’ training, which in fact is government funded and this can lead to employers and learners not realising the value of their courses.

Continuous evaluation and improvement is essential for success. It is important to listen to employers and learners needs but to also take a risk

sometimes and try something new - whether this is new methods of delivery or courses.

Section 7: Future planning

What next?

STAR will continue to grow its commercial training through the distance learning programmes and will continue to make adaptations to its programmes because of employer and learner feedback.

We already have identified that we would like to offer some non-accredited courses. We have also identified a demand for a level four Teaching Assistant qualification.

What is the legacy?

Long term, we hope that we can change our business model to be less reliant on government funding and generate most of our income from those paying for our programmes.

We want to build on the success of the project and design more programs to ensure that we can meet the needs of all support staff in schools.

Section 8: Further information

Please supply contact details to help people who want to know more about the project.

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