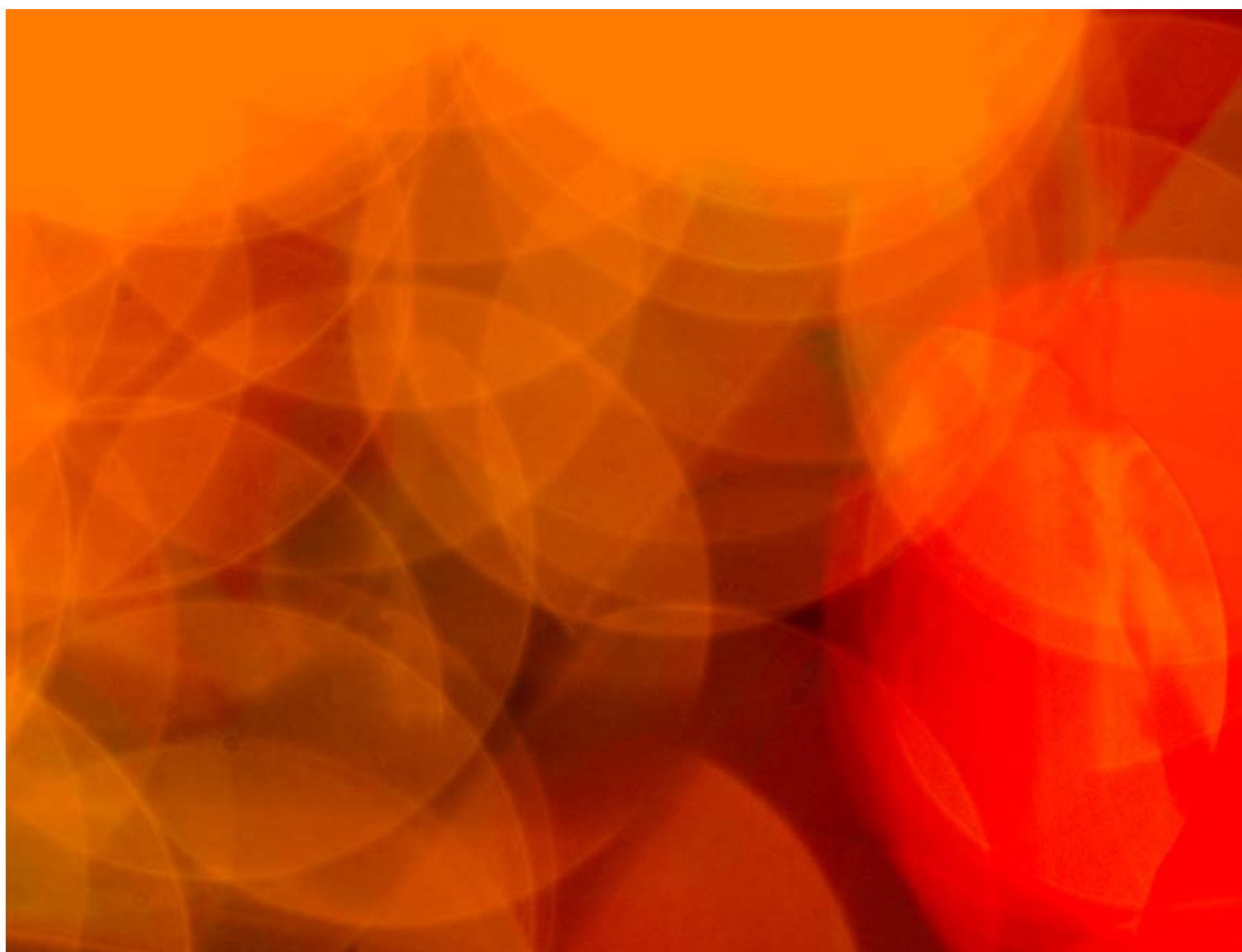


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Developing Responsive Provision

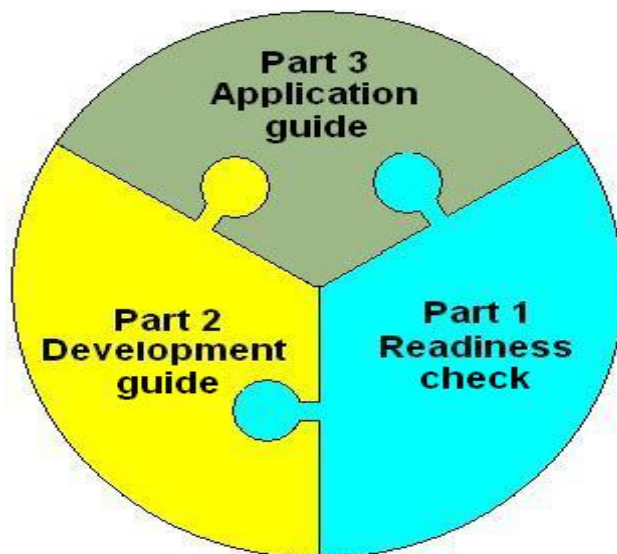


Training Quality Standard

Part B

*Support resources for training provider organisations
in the building services engineering sector*

Part 2: Development guide



Developed in association with:

Summit SKILLS
The Sector Skills Council for
Building Services Engineering

Contents

Section 1	Introduction	3
Section 2	A new kind of quality mark	6
Section 3	Developing sector expertise for TQS certification of excellence in building services engineering	8
Section 4	Next steps	30
Appendices		
A	SummitSkills 'footprint' guide	33
B	SummitSkills stakeholder table	35
C	Useful Contacts	36
D	Benefits of the Training Quality Standard	37

Section 1: Introduction

1.1 What is the Training Quality Standard?

The Training Quality Standard (TQS) is 'An assessment framework designed to recognise and celebrate the best organisations delivering training and development solutions to employers' (*Introducing the Training Quality Standard* CFE/LSC July 2008). Until May 2008 it was known as the New Standard.

For detailed information about the standard look at the Training Quality Standard website www.trainingqualitystandard.co.uk, particularly the *Eligibility* document which has details of the requirements, eligibility criteria and special conditions that will determine the eligibility of an organisation to make a TQS application. The website also has details of how to access further support and training.

1.2 Background to this activity

This development guide is one of the outputs of a project funded by the Quality Improvement Agency (QIA), via the Learning and Skills Network (LSN) between May and August 2008.

The project builds on the experience from previous TQS Part B support projects (completed in April 2008) that worked with most of the TQS certified providers in the construction and engineering sectors. This project was conducted with the help of the Sector Skills Council (SSC), SummitSkills, and training provider organisations working in the building services engineering sector. Their input has helped to define the content and shape the approach of this guide.

1.3 Who is this guide for?

This development guide is provided to assist training provider organisations that aspire to achieve TQS Part B certification of excellence in building services engineering.

When planning for TQS Part B, training providers need to determine the 'fit' of their provision with the relevant SSC to know what to include in their application. (See Appendix A SummitSkills 'footprint' guidance for details.)

1.4 Suite of resources

This development guide is the second part of a three-part 'suite of resources' produced to assist training provider organisations achieve TQS Part B certification of excellence in building services engineering.

The three parts are:

- Readiness check
- Development guide
- Application guide.

Summary of these resources

Readiness check

The readiness check is designed to enable a training provider to compare their systems and processes with the requirements of the TQS Part B. It can be used a quick 'first check' or as an 'audit tool' to ensure that all the required systems and processes have been implemented before the submission of a Part B application.

Development guide

The development guide (this document) is designed to support the organisational development of training providers in the building services engineering sector as they progress towards TQS Part B certification. Training providers who answered 'Yes' to 15 or fewer questions in the readiness check should consider using this guide before they use the application guide.

Application guide

The application guide is designed to assist training providers to complete a high-quality TQS Part B application in the building services engineering sector. It would only be appropriate to work immediately with this document if you were able to answer 'Yes' to all (or nearly all) of the questions in the readiness check.

1.5 Aims of this guide

The guide aims to support training providers as they work to:

- identify key development areas for their building services engineering provision linked to the requirements of Part B of the TQS
- plan their development journey towards certification
- undertake a range of development activities that will help them progress towards certification.

1.6 How to use this guide

Before you decide to use this guide you should refer to the accompanying readiness check to help you make a relatively simple assessment of your existing provision. The 'Interpreting your responses' section of the readiness check will enable you to decide whether you then need to use this development guide or the application guide.

This development guide may be used:

- to help you develop the understanding of everyone in your organisation of issues related to the implementation of the requirements of the TQS, and especially Part B of the TQS
- to help all your employer staff become familiar with the requirements of Part B of the TQS
- to support and enhance your organisation's development programme linked to Part B of the TQS
- to help you check your progress as you work towards preparing an application for certification.

Section 2: A new kind of quality mark

2.1 Overview

The TQS was developed by CfE for the Learning and Skills Council (LSC). Introduced in 2007 and officially launched in April 2008, the TQS provides a new certification framework and a new assessment model.

Since 2007 many training providers have been considering how best to implement the requirements of the standard. Some providers have also sought – and gained – certification.

Feedback from the first round of assessments and from recent applicant and potential applicant organisations confirms that the TQS is extremely robust and that gaining certification for Part A (responsiveness) and Part B (sector expertise) is very challenging.

Importantly, **even training providers who are confident that they have high-quality, employer-focused provision are discovering they have a development journey to make before they are ready to apply for certification!**

2.2 Why is achievement of the TQS important?

The TQS supports several key LSC initiatives:

- the introduction of demand-led funding
- expansion of the network of National Skills Academies
- expansion of the Train to Gain programme
- the Framework for Excellence
- the consolidation of the current Quality Assurance Framework.

Achievement of the TQS will also lead to valuable recognition from employers and industry that a training provider is responsive and that they have excellence in one or more sector.

2.3 Why is TQS certification proving challenging?

The fact that TQS is designed to be robust is only part of the reason why certification is proving challenging.

The TQS has a particular and clearly defined focus. It deals with how training provider organisations develop and manage successful customer relationships with employers, and how they ensure that the content of the training solutions they deliver achieves the necessary quality and impact to back up those relationships.

Training providers are typically unfamiliar with such direct scrutiny of their employer work; furthermore, the TQS assessment methodology is unlike other quality systems and the presentation of evidence in the way expected by the standard is proving problematic. It is clear that some applicants are 'brainstorming' evidence from staff who have been involved with employers and then 'slotting this evidence in' to each section of the application as it seems to fit. However, this typically leads to a weak application. Instead the approach needs to:

- tell a coherent story about the provision
- explain the processes that form the structure of the provision or
- explain the links between the processes, vital to a high-quality operation.

TQS guidance is explicit that the above features should form the basis of a completed application. However, what is happening is that applicants are typically using 'outcome' evidence rather than the evidence of 'processes' as the basis of their application. Outcome evidence is vital but should only be used to 'prove' the operational effectiveness of processes. Presentation of outcome evidence alone is usually a clear indicator of the lack of strategic direction of the provision.

Section 3: Developing sector expertise for TQS certification of excellence in building services engineering

3.1 Overview

Part B of the TQS demands that you demonstrate how you work to support the development of the sector in which you have specialist expertise. Therefore, this part of the TQS focuses on your sector expertise – that is on your relationship with the building services engineering sector.

Training providers can choose to work with Part B of the TQS at any time but if they want to gain TQS Part B certification they will need to adopt one of the following routes:

- work with Part A, gain certification for Part A first, and then work with Part B or
- work with Part A and a Part B area concurrently and seek certification for both parts at the same time.

Bearing in mind the explicit links between TQS Part A and Part B and the fact that research evidence and SSC feedback have identified linking and cross-referencing of Part A and Part B applications as ‘weak or non existent’, the recommendation is that training providers seriously consider the second of the above two options, especially if building services engineering is planned to be the first (or only) Part B area in which a training provider intends to seek certification.

If the first of the above options is adopted, it is recommended that the Part A application is revisited and through cross-referencing used to support the Part B application. The assessor feedback from the Part A application should also be taken into account as Part B assessors will need to see that earlier feedback has been used to influence development actions.

3.2 SSC Part B guidance

Most SSCs have produced TQS Part B guidance to assist training providers to consider their impact in the sector and to help identify possible evidence sources for a TQS Part B application. The SSC for building services engineering, SummitSkills, has just published its second version (July 2008) of the guidance that can be found on the TQS main website at

www.trainingqualitystandard.co.uk (follow the 'resources' link on the left-hand side of the home page). SummitSkills has also provided other resources in direct support of this development guide, including Appendix A SummitSkills 'footprint' guide and Appendix B SummitSkills stakeholder table.

3.3 Thinking about the development process

This section of the guide will help you to interpret the requirements of Part B of the TQS and the specific guidance produced for training provider organisations in the building services engineering sector. It will help you to assess how far you have progressed towards certification; to articulate your successes and achievements with reference to Part B of the TQS; and to identify any development actions you need to complete before you seek certification.

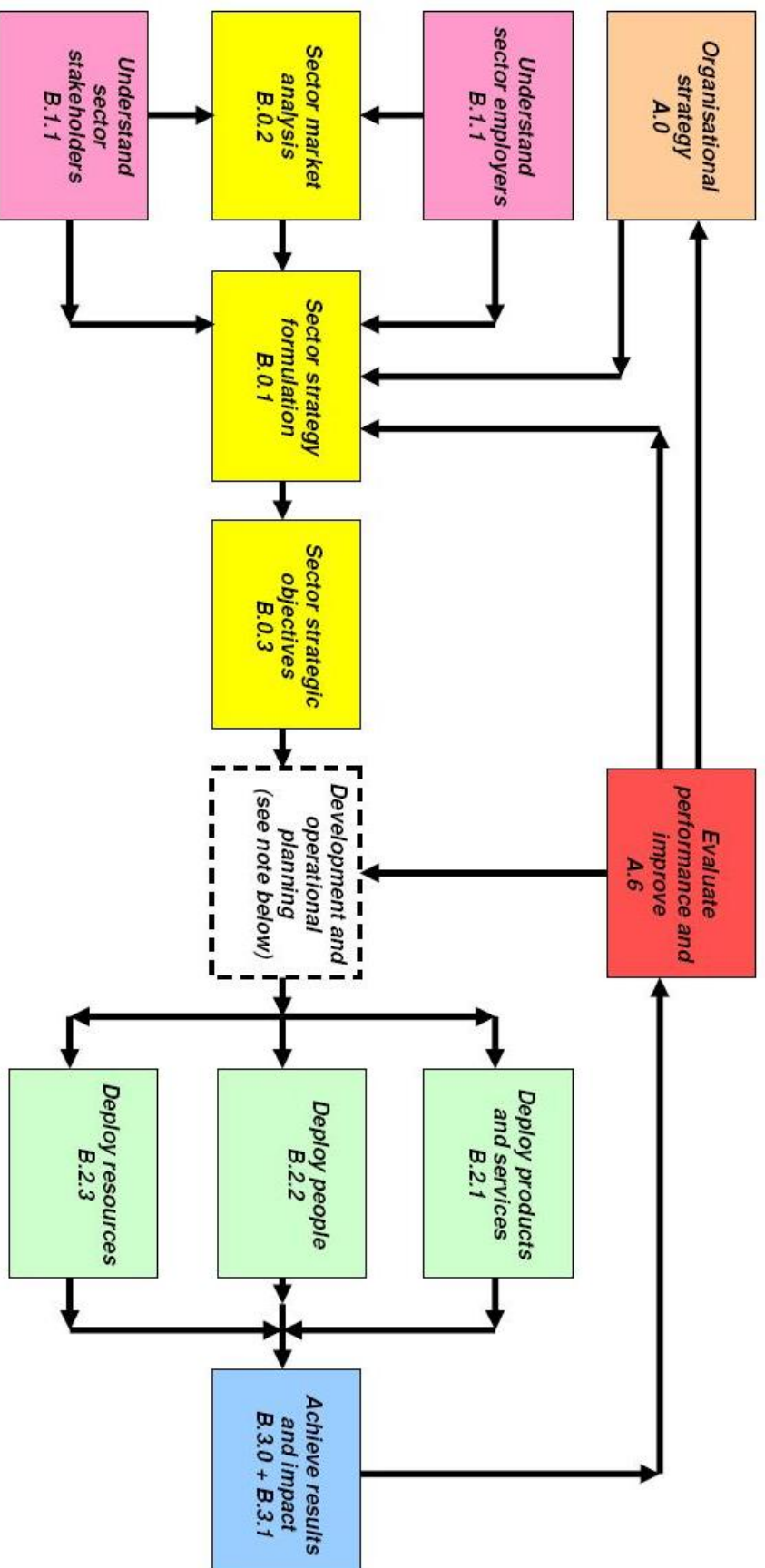
TQS Part B guidance is clear that training providers are required to **tell a coherent story of their employer provision as it relates to the sector** in which they operate and the previous section of this guide has explained that not all previous applicants have done this well. It would be inappropriate for this guide to instruct a provider what story to tell, and in any case every story will be different – unique to the provider and their own set of circumstances. However, this guide is designed to provide a detailed understanding of the processes that TQS assessors expect to see. Importantly, it also suggests a way that the processes and outcomes can be effectively linked (see flowchart on page 10) making presentation of a coherent story much simpler.

Training providers should be aware that they are not obliged to structure their provision as this guide recommends. The standard is non-prescriptive and providers can offer different solutions to the challenge of employer work. However, the Part B structure recommended by this guide is the culmination of extensive research and has been designed to incorporate all the processes contained in the detail of the Part B criteria.

This guide has been written from the premise that the training provider is starting from scratch with its employer-focused training service to the building services engineering sector. If not, you will need to judge whether your existing evidence should be included in an application. However, bear in mind that **an appropriate strategy that is implemented through a combination of sector knowledge, effective systems and processes, together with appropriate deployment of staff and physical resources, is the key to a TQS application and existing evidence should only be used to prove the existence and operational success of the structure they are describing.**

Training Quality Standard Part B

Flowchart – suggested process and outcome links



Note: Although there are not specific TQS criteria for operational and development planning, these processes are considered to be essential for the effective deployment and continuous improvement of products and services; people and physical resources. Development planning guidance can be found in section 3.7 of this guide; however, operational planning is considered to be a routine training deployment process and is not therefore covered in this guide.

3.4 The structure of the TQS Part B

Training providers who are committed to developing high-quality employer-focused provision and who then want to use the evidence from this to seek TQS Part B certification will first need to understand the relationship between the processes in the standard. Analysis of past applications suggests that training providers who simply read the Part B criteria are not gaining this understanding and are therefore completing relatively weak applications. **It is therefore very important that time is invested in working with this section before decisions are taken about development activities and timescales.**

TQS Part B consists of four sections:

- B.0 Sector strategy
- B.1 Understanding sector employers and stakeholders
- B.2 Deploying training solutions to sector employers
- B.3 Sector results and impact.

It may seem logical to start with the first criterion in B.0 and work through each section in the order it is presented in the standard. However, when training providers work with Part B they will realise that the criteria are not presented in a way that ‘flows’ logically (from an operational perspective) and understanding this is the key to the structure of the training provision. In some ways it is best to clear your mind of how you currently work with employers and start with a blank canvas on which to create an effective structure for your employer-focused building services engineering provision.

Imagine you have never delivered training solutions to building services engineering employers before. How would you start? Well, you would need a strategy that describes your aims and that ultimately details your objectives, but clearly you could not create this without taking into consideration important information from several sources. This is where the flowchart on page 10 becomes important. It suggests how all the things that you should take into account to form your strategy are linked, and following this, how the strategic objectives can then be deployed and ultimately produce your results and sector impact.

3.5 Sector strategy formulation

Looking at the TQS Part B suggested structure you can see that there is a major focus on the formulation of a sector strategy (Strategy Formulation B.0.1 on the suggested process and outcome links flowchart, page 10).

NB. At this stage the focus of the sector strategy should be quite general, looking at overall aims and approaches rather than specific objectives or targets which you will go on to determine later.

You can see from the flowchart that in order to formulate a sector strategy you need:

- information from the main organisational strategy (relating to working with employers)
- a process for understanding your sector employers
- a process for understanding your sector stakeholders
- a process for analysing the market in which the provision operates
- ongoing information from the performance monitoring and quality improvement processes that operate on the provision.

It should not be difficult to locate information from your organisation-wide strategic documentation that relates to working with employers (the application guide explains how to use this information).

More challenging is the implementation of the processes listed above which will ultimately provide information for the strategy formulation process.

Understanding sector employers

High-quality, employer-focused training provision will have a portfolio of products and services, coupled with a range of responsive and flexible delivery options that meets the needs of employers within the area of operation of the provision (see market analysis, page 16, for explanation of the 'area of operation' of the provision).

Within your processes you should demonstrate how your approach to work is shaped by your employers. You should also demonstrate that you are responsive and offer what sector employers want and need.

You need to have a systematic process that shows you have a 'dialogue' (in a broad sense) with sector employers and that you make effective use of the information you capture from the process.

You could implement a process based on the following three stages:

- plan the way you intend to gather and analyse information from sector employers
- show that you have done what you planned to do using real examples and referring to the results of your analysis
- show how the views of employers have had an impact on the training solutions on offer and how their views have influenced or changed your strategy.

Further guidance

1. Plan the way you intend to gather and analyse information from sector employers

There are many and varied opportunities to seek employer (or employer representative) views of the training solutions you intend to offer:

- employer federations
- Sector Advisory Committees
- SSC forums
- Skills Academies
- when undertaking organisational needs analysis (ONA) and training needs analysis (TNA)
- programme delivery
- on-site or work-based assessment
- site visits, industry placements for staff
- projects
- visiting speakers
- specialist advisers
- employer update events
- workshops
- questionnaires

and many more!

Employer consultation should not just consider the training products or solutions on offer but also take account of common business needs. High-quality training solutions will help employers to develop their businesses and be ambitious about 'business impact', so employer consultation should include the range of possibilities that training solutions can offer to improve and develop businesses. There should also be quality processes to capture the satisfaction levels of employers and trainee delegates about training solution delivery.

You will need to explain your plan for capturing and analysing information from this vast array of opportunity, eg which opportunities you consider most valuable and why; when, how often and how you will capture the information; how the information will be analysed and used; by whom and how often.

2. Show that you have done what you planned to do using real examples and make references to the results of your analysis

Having explained how you intended to gather and analyse information from employers, employer representatives and training delegates, you should evidence the outcome of these processes. Explain how well your planned activities actually worked and what they produced in terms of volume and extent of information.

The results of the analysis process will be the key information, supported by appropriate references to evidence sources (minutes of meetings, workshop planning, consultation papers, completed questionnaires, etc). This information may be presented in different formats but would probably include the summarised views of employers. The summarised views of employers can be used to inform your market analysis. It will then be necessary to consider your reaction to each view and determine appropriate courses of action. Also, information relating to the availability and delivery of products and services (training solutions) can be used to inform the development-planning processes explained in section 3.7 of this guide.

3. Show how the views of employers have had an impact on the training solutions on offer and how their views have influenced or changed your strategy

Consultation is pointless if the information gathered and the views formed as a result do not influence or change the strategy and operational procedures of the training provision on offer. On the other hand, where issues have been raised and changes suggested and there is an 'audit trail' of effect through the quality improvement, development planning and/or strategic planning process, this reflects a responsive and high-quality operation. The outcome of the above analysis will have produced evidence that sector employers have had opportunities to express their expectations of training solutions and the links to common business needs and business impact. The general link to strategic planning will be clear if the information has been used in the 'market analysis'

process and subsequently to inform the general strategic aims and approaches through 'strategy formulation'.

Ultimately, when you complete a TQS Part B application you should also be prepared to show specific examples of strategic or operational changes as a direct result of employer views (the application guide explains this further).

Understanding sector stakeholders

You need to show that you engage with an appropriate range of sector stakeholders and that you have dialogue with them. The process you implement needs to prove that you systematically use your contact with sector stakeholders to ensure you have a current and robust understanding of the sector's common business needs.

Who are you in contact with? How often? How do you use the opportunities to gather information? What form does the information take? How is it analysed? By whom? Etc.

To help with this SummitSkills has produced a table (Appendix B) for this guide identifying a range of possible stakeholders and possible sector objectives/needs. The table is not exhaustive but is provided to assist you with communicating what you are doing or plan to do in a **sector-related context**. For example, these will give you ideas for the agenda of stakeholder meetings and in time this will help you set performance objectives designed to have an effective impact on the sector.

(Text explanations of stakeholder contact, internal and external, can become very complicated, and ultimately may be difficult to portray in a TQS application. For clarity, you may prefer to use a diagram.)

The key reason for the process you will be implementing is to show that stakeholders have the opportunity to influence the formation of your strategy. The TQS also expects you to be able to show that you communicate with stakeholders about your strategic performance (see section 3.6).

Within the stakeholder section, the TQS also expects training providers to demonstrate a proactive approach to sharing sector-related good practice. You need to think about opportunities for this, through training provider networks and/or partners, for example.

How is this planned? What dissemination processes are used? Who is involved? What processes are used to consider the information captured from partners etc? Who is responsible? Etc.

You should be able to show that key information from best practice exchanges influences your work within the sector. You could show, for example, that this has been used within the strategy formulation process or more directly on products and services through the development-planning process explained in 3.7 of this guide.

Market analysis

You need to show that you have a process that regularly and systematically analyses the market in which the provision operates and identifies what the specialist area of provision considers to be its key customer groups. A summary of a general analysis of national labour market intelligence (LMI) in the sector would be a good starting point, including the documents used and the organisations that produce them (LSC, SSCs, sector bodies, etc). However, most providers will also have a geographic area of operation based on a combination of local and regional delivery and linked to key customer groups. Information relating to the determination of this would be useful to set the context of an effective market analysis and demonstrate a sound understanding of the factors in play.

Analysis should go on to include the range of ways in which local and regional LMI and other relevant information is gathered, including documents published by the RDA and regional LSC, where they specifically refer to the sector, and information from regional observatories, economic support organisations, local employer bodies and group training associations. Information from both the employer consultation and stakeholder consultation processes will also provide important market analysis contributions.

Other initiatives that identify and target 'hard-to-reach' customers (such as micro businesses and small/medium-sized enterprises, SMEs) would enhance the analysis and provide further evidence of a proactive approach to the needs of the sector.

Your market analysis process needs to show clearly the structured way in which all the above information is analysed (who is responsible, how often does it happen, what information sources contribute, what analytical processes are used, etc). The outcome of your market analysis process is likely to be a paragraph of text containing key information points, which could be called your

'market view'. The systematic way in which you have analysed information from all the key sources will be strong evidence that your 'market view' is current and robust.

Performance monitoring and quality improvement

Your strategy formulation would use information from the processes you are creating as it became available. However, if you had not already begun to deliver training solutions there would no information from performance monitoring and quality improvement processes. The rationale for the inclusion of this input to strategy formulation is a clear indicator of how your sector employer strategy should be a living document, regularly and formally updated in the light of, for example, economic targets, sector developments, and performance and quality issues.

TQS Part B contains clear guidance on performance targets and objectives, explained in section 3.6 (sector performance objectives) of this guide. However, it is also clear that there should be clear links between the performance of the specialist provision and the organisation-wide processes for performance monitoring and quality improvement (TQS Part A section A6). If specialist provision is still under development it may be some time before information from these processes relating to the specialist provision can be fed back in to the strategic formulation process. However, the process should include means to acknowledge and anticipate this even before performance and quality feedback information becomes available.

Completing the sector strategy formulation process

Once you have introduced the above processes and brought together all the relevant information you can complete the sector strategy formulation process. You should explain your strategy for working with the building services engineering sector and how this strategy was informed and created. The relationship with the employer engagement elements of your organisation's strategic plan should be explained as simply as possible. The sector strategy will need to show how well the management team understand the building services engineering sector and how this understanding translates into **general aims and approaches**. The way in which the 'market view' and relevant information from the processes for understanding employers and understanding stakeholders are integrated into the strategy will need to be clear. You should show how the strategy will be delivered (in a general sense);

if this is not already clear from the way the aims and approaches have been presented. It is also necessary to make clear how the effectiveness of the strategy will be reviewed, although this may be built into the performance review of your strategic objectives (see 3.6).

The final key feature of the process is to show how your strategic aims and approaches are formally communicated to appropriate stakeholders. Real examples of stakeholder influence in action will contribute powerfully to a TQS application, so you should aim to capture these, but at the very least an assessor should be left in no doubt that stakeholders support the content and extent of the strategic aims and approaches (for example, through relatively formal stakeholder processes, minutes of meetings, and so on).

3.6 Sector-strategic performance objectives

This is the most important section for TQS Part B because **the sector performance objectives that you set are the ones against which you will need to later display your results**. However, evidence from previous applications has shown that this has not been done well for two main reasons:

- applicants have displayed actual results data in this section of their TQS Part B application, which they should not have done (possibly because the heading in the B.0.3 section on the documentation template is 'define results' which is subject to misinterpretation)
- the results that applicants have typically displayed later in their applications (in the B.3 section) have not related to the performance objectives from this section even though this is an explicit requirement.

Before you reach this point you should have formulated your general building services engineering sector strategy and described it in terms of general aims and approaches. You now have to use this as the basis for the creation of a series of performance objectives (or targets). The strategic performance objectives should set the challenge of high-quality building services engineering sector work in the context of the marketplace in which your provision operates.

NB. Remember that although the TQS B.0.1, B.0.2, B.0.3 (Strategy) indicators carry no points, all other indicators are point scored, and are reviewed and assessed in the context of what is communicated from the strategy section. Failure to set **sector-specific** strategic aims and performance objectives will inevitably lead to a weak and possibly unsuccessful application. This guide is not about telling you what to do or who to work with – that is your decision. However, you must have a clear sector-related rationale for providing the product and services that you offer.

It is essential that your sector objectives are specific, measurable, achievable, relevant and time-based (SMART) to ensure that there is clarity in the comparison between them and the actual performance of the provision. The processes for reviewing performance against the objectives should be explained clearly. Who is responsible, how does it happen, how often, etc. When you eventually complete a TQS Part B application you will need to be able to demonstrate the effectiveness of the performance review process. The best evidence of this is likely to be provided by explaining your processes for taking action on underperforming areas. Actual examples of how these processes have improved performance through strategic modifications, ie how the cycle of quality improvement has been effective, will contribute powerfully to a TQS application.

It should have been clear from the strategy formulation section that you communicate your strategic aims and approaches to appropriate stakeholders and that stakeholders have opportunities to influence your strategy. Stakeholders should also have access to your strategic performance information and it would be effective to clarify how you organise this and what impact this has on stakeholder influence.

3.7 Deploying training solutions

When you reach this stage you will have already planned thoroughly and laid out your intentions of how you will deliver training solutions to the building services engineering sector through your strategic performance objectives. The next stage involves demonstrating your sector expertise by proving that you meet the needs of employers and the expectations of industry operationally through your products and services, staff and resources.

Deploying products and services

Although this guide has been written on the premise that the training provider is starting from scratch, most providers, realistically, will have some existing employer-focused products and services (and staff/resources) and may want to use this evidence. This may not be a problem, but it is very important that you can show that these were formally and systematically designed to meet employer needs and that you rigorously evaluate their effectiveness, especially the business impact.

The use of existing provision alone is unlikely to meet the full requirements of TQS Part B because:

- your performance objectives should have set a **challenge** of high-quality sector-related work; for example the latest industrial developments, 'priority' guidance from stakeholders and changing economic factors
- the TQS Part B is clear that expert training providers should be constantly developing their training solution offerings through improved products and services, staff development and resource investment.

Bearing in mind these factors, you may be able to start your work in this area by explaining what you already have to offer but you will also need to show development activity. TQS requires that you show evidence of the quality and effectiveness of your management processes and for this reason you should consider implementing a robust and dynamic development planning process for implementing and monitoring your improvement actions. Such a process is most likely to be based around a formal development plan. However, you should be clear that although a development plan can indicate the extent of the ambition of management to improve the products and services on offer it may not show the rationale that predetermined its creation, the processes for reviewing progress, or the processes for evaluating the impact of the new products and services.

Implementing a development plan

Rationale and content

You should explain the consultation, research and internal decision-making processes that predetermined the creation of the development plan. The original aim or approach that initiated the creation of a development plan should be linked to your strategic aims and strategic performance objectives. There should be multiple sources of evidence that support a sound rationale from the content of your work during the strategy formulation process and the key elements of this should be referred to in your explanation.

For example, there is research and sector-needs information from sector-based guidance documents such as the Sector Skills Agreement (SSA) and Sector Qualification Strategy (SQS). (Copies of the SSA documents may be viewed and/or downloaded from www.horizon-ssa.org.uk. At the time this guide was produced SummitSkills was in the final stages of producing the SQS and related action plans. The SQS should be published in October 2008. For further SQS information please contact SummitSkills.) You should also refer to section B.2.1 of the TQS Part B guidance (July 2008 version) provided by SummitSkills, which provides advice on sector-specific products and services.

There is national, regional and local LMI from the market analysis process, and consultation outcomes from employers and stakeholder organisations will show that your plan is designed to develop products and services to meet employers' needs and sector expectations.

It will also be very important to consider the implications of your development objectives for your existing staff and resources. It makes sense to incorporate resource development targets and related staff-development targets into the development plan, to demonstrate a cohesive approach to the overall process.

Last, but definitely not least, consideration of the results of evaluation impact studies of the previous development plan compared with the targets in the new plan, would also demonstrate quality improvement in action.

What is the process that uses the above information in the production of the development plan? Who is responsible? How often does this happen?

Progress review

Your development plan should be a 'living' document to show that you are proactive in achieving your targets and that you regularly review progress towards reaching them. Minutes of section or management meetings in which progress is specifically discussed could be used as evidence, and actions taken to boost underperformance formally recorded. A relatively simple spreadsheet with the targets listed, review dates and outcomes, action taken, etc, would be an effective way of presenting evidence of a proactive approach.

Evaluating the impact of new products and services

The quality of the development-planning process should be reinforced by evidence that you take a close interest in monitoring the impact of new products and services. This should include a planned approach to evaluation, especially of business impact/improvement, and specifically including feedback from delivery staff, employers and employer delegates.

How are you going to do this? When? Who is responsible?

You will need to show that the results of the evaluation are used constructively and effectively, for example, to inform future strategy formulation and development-planning processes. Examples of how successes or failures in this area have tangibly influenced strategy or development planning would significantly enhance your eventual TQS Part B application.

Deploying expert staff

The next stage is to show that the people arranging and delivering products and services have the knowledge and skills to meet sector expectations. There is likely to be a tendency to simply show that all the technical teaching and assessment staff in the Part B area are qualified to recognised industry standards and appropriate teaching and/or assessment qualifications. However, consideration should be given to the whole process of arranging and delivering the products and services that you have identified. Staff involved in **all aspects of this process** should have an appropriate set of skills and knowledge.

A good starting point would be to consider the general way that a training solution is delivered to an employer, from first contact right through to post-delivery evaluation. The organisation will need to explain its procedure for dealing with initial employer enquiries in a TQS Part A application and reference should be made to this process. Your explanation should then expand on this to explain what happens from the point at which the enquiry reaches the Part B area.

How do you respond to this? Who responds? When? What processes are used to establish the needs of the employer (eg TNA, ONA, etc)? How do these take account of the business needs of the company? Who is responsible for establishing these needs? If business development staff and technical delivery staff are involved at this point, what integrated working practices are established? If training solutions are agreed, do business development staff continue to be involved throughout the delivery phase or is this left to delivery staff? How is the impact of the training solution evaluated? Who is responsible?

The explanation will put into context appropriate sets of skill and knowledge for those involved in different aspects of the process. It would be inappropriate to include a 'list' of possible skills or qualifications here but these will need to be predetermined for each role in the process and evidence of compliance with these will need to be provided.

You will also need robust evidence of staff development. Elements of this could form part of the development plan, because the development and delivery of new or modified products and services will be adversely affected by staff who do not have an appropriate skillset. This should also be linked clearly to the acquisition and deployment of up-to-date resources. Furthermore, you will need to leave no doubt about your commitment to maintaining the credibility of your staff with employers through a methodical and well-resourced programme of

continuing professional development (CPD). You should have records of professional development that are likely to include industry placements, exchanges, award body certification, specialist training (eg manufacturers' courses), etc. Finally, you will need evidence that staff arranging and delivering training solutions are respected by employers (for example, through positive feedback reports).

Deploying high-quality physical resources

The final part of this section is to show that the physical resources used to arrange and deliver products and services meet sector expectations. Physical resources include your buildings, equipment and teaching/learning materials but may also include the resources of employers you work with, if delivery takes place in-company. You may have chosen to use some of your existing products and services earlier in this section and if so you should have explained how these were formally and systematically designed to meet employer needs. You will need to explain the same about your existing resources. You will also need to show how you will systematically evaluate the effectiveness of the resources in action and that you are continuously striving to improve resources in support of the improvements to your products and services.

If you are introducing a comprehensive development-planning process as described previously, you should consider including the resource implications that are attached to the development plan objectives. You should have assessed your existing resources against current industry standards, technological developments, industry expectations and have considered employer feedback on resource quality and evaluated the options for resource improvements. The process should demonstrate that you have taken account of sector research and that you have consulted employers and stakeholders, including manufacturers.

Ultimately, you should be able to use your development planning and quality improvement documentation for reference, to show that you have existing resources that have been proven to meet current sector expectations, but also that you have systematic processes in place that ensure your resources continue to improve in line with changing sector expectations.

Once again, you should refer to the Part B guidance (July 2008 version) provided by SummitSkills, which includes resource-related suggestions in section B.2.3.

3.8 Your performance and sector impact

This part of the TQS deals with the results you achieve in terms of **fulfilling the objectives you have set out in your sector strategy** and the **impact your work has on the sector**.

The narrative in this section is different from the bulk of a TQS Part B application because it should be **based mainly on data, analysis and evaluation**. It was made clear earlier in the guide that some previous applicants have overlooked the **need to link this section of their Part B application to their own strategic performance objectives**. This development guide has explained in detail how to plan and eventually define your building services engineering sector-specific strategic performance objectives. It should also be clear that having done that you will need to systematically monitor your performance against these objectives. Only when you have been able to collect sufficient data to show that your sector-related expertise is causing 'improving results or sustained good performance' **against the defined objectives** will you be able to complete this section of a TQS Part B application effectively.

Some previous applicants have also struggled to understand the distinction between the two parts of this section, B.3.0 and B.3.1. TQS guidance is not particularly clear about this but the key distinction between the two sections is that the second section is focused specifically on 'sector impact'. The recommendation of this guide is that for B.3.0 you need to consider displaying **all your results that relate to your sector performance objectives** and then for B.3.1 you need to consider how you will analyse and evaluate what impact your strategy (B.0) understanding (B.1) deployment (B.2) and results (B.3.0) have had on the sector. To analyse and evaluate the sector impact of your results you will need to refer back to the building service engineering sector priorities and also consider business impact (see further explanation below).

Further results guidance

This results section is very important to your TQS Part B story because it provides the opportunity to demonstrate the effectiveness of your performance review process and the vital contribution this plays in the 'improvement journey' of your provision. Although TQS guidance explains that this section should be based mainly on data, you should be careful about this. The data you collect to provide evidence of 'improving results or sustained good performance' should be presented as a continuation of the story of the provision, effectively a

culmination of all the hard work of planning and delivering to the employer audience. Effective processes will have been planned from beginning to end, and therefore you should be able to show that you have delivered against your performance objectives, which in turn will have delivered against your general strategic aims.

The form in which your results will need to be presented will depend on the sector performance objective you are addressing, but they could be made up of figures, graphs or tables and may relate to recruitment, retention and achievement data, new courses offered, workforce qualifications delivered (against LMI and sector priorities), etc. You should plan to provide brief commentary on each achievement in your eventual application, explaining the way each of your performance objectives has (or has not...see following text) been met and including issues that were encountered on the journey to achievement, and other relevant features, such as trends.

You have been made aware that you need to show an 'improving trend or a sustained high level of performance' but a key point to remember when you are working on displaying your results is that TQS is not about perfection. Showing how you deal with performance objectives that have not been reached is as important as presenting the evidence of your success. You will therefore need to show how your performance review links to your improvement processes. This provides a key opportunity to link your Part B application to the Part A application, which has an improvement section (A.6). You should work to demonstrate harmonious interaction between the improvement processes used in the Part B area and those in use across the wider organisation. It is also important to link back to the development planning process explained in section 3.7 above. You should plan to capture evidence of real examples of the improvement process in action because these will do much to enhance your Part B application when you come to complete it.

Further sector impact guidance

The focus of this final part of Part B of the TQS is that you demonstrate that your strategy, understanding, deployment and results have had an impact on the businesses and workforce of the building services engineering sector. It is imperative that you are able to do this in order to prove your credibility as an expert provider of employer training solutions in this sector. If you researched effectively and reviewed key sector documentation during the 'market analysis' and 'strategy formulation' processes described earlier you will have developed an effective understanding of how you can achieve this impact. You should consider the following two areas as key requirements of this section:

- impact on workforce development priorities and sector targets contained in the SSA, SQS and other sector documents
- business improvement impact on a range of specific businesses (see further guidance below).

The strategic performance objectives that you set earlier should relate particularly to these requirements and eventually you will need to provide data, analysis and evaluative comment on how these have been achieved.

Once again, you should refer to the Part B guidance (July 2008 version) provided by SummitSkills, which includes sector impact guidance in section B.3.1.

Further information about data

If you have read this whole guide you will realise that your strategic performance objectives form a vital part of your formalised and high-quality service to employers in this sector. You should have realised that you need to set the objectives very carefully, not just because of the needs of the sector and its employers, but also so that you know that you can prove that you have met the specific objectives. You will need measurements, analyses, trends and statistics. You will also need to confirm that you are measuring the right things and collecting information about the issues that will help you to fulfil the requirements of your strategy completely (these will also help you to run your business more effectively). However, before you decide to draw on any statistics you will need to be clear about the case they make. How do your figures and graphs illustrate the case you want to make about your successes? Do you have any comparative data about the sector, locally, regionally and nationally you can use to help you with this task?

Training providers have lots of experience of collecting information about learners: retention rates, achievement rates, qualifications rates, etc. Often they have information and analyses that go back for several years. However, the analyses in themselves have little value in the context of your work with the TQS until you are clear about what they mean in business terms and how they relate to what you are trying to do to support employers in your sector. You may need a new mindset? In addition to statistics about achievements and similar information, think about statistics that relate to the things that are of interest to employers. These will help you to make the case that you are supporting the development and improvement of the sector and to demonstrate

that you are also helping individual employers – as well as their employees – to be more successful.

Further information about business impact

This is one area of the TQS that has proved particularly challenging for training providers. When they start to think about business impact they think about the turnover and profit of a company and begin to get very nervous about issues such as the sensitivity of company data. However, there is an effective way to consider this. Ask a simple question every time you negotiate training with an employer – why are we doing this? The training solution that you propose should not only be meeting the employer's needs but should be designed to tangibly improve the business. Your quality procedures will need to measure if this has been the case and therefore your pre-training dialogue with an employer should set out what you plan to achieve so that you can prove the impact during post-delivery evaluation!

There is huge variation in the organisation structure of training providers but in most cases there will be strong links between the technical and professional training staff in the TQS Part B area and their business development colleagues who usually have a more generic employer responsibility. Bearing in mind the importance of business impact to the TQS it is critical that potential applicants look closely at this relationship, especially, the procedures in place for negotiating training solutions with employers (ONA, TNA, etc), and the way in which the impact on the business can be tangibly measured.

One impact you should consider is that of **worker productivity**. Statistics relating to worker productivity usually deal with the impact of the employee's ability to use new skills. Often this is measured in terms of doing tasks more quickly or reducing error rates.

The above information should not lead you to preclude fiscal matters in your business impact deliberations; it is simply that it may be impossible to measure financial gains as the result of many training interventions. However, the subject of **enhanced business profitability** should be considered wherever possible. Statistics relating to enhanced business profitability usually relate to the measurement of what an employee will be able to do once he or she has gained new skills and how this will benefit the business. A comparison with what the worker could do before the training and with what he or she can do afterwards will help to make the point. This approach also allows you to undertake profitability calculations.

If you are able to measure the same things in many of the businesses with which you work you will very rapidly start to build up a useful profile of the success of your training solutions. If you measure quarterly, for example, in less than a year you will start to see trends and you will be able to make a case for the impact you are having in the building services engineering sector. Using this approach will also help you to begin to benchmark performance more effectively.

Section 4 – Next steps

4.1 Overview

You will have realised while working with this guide that very few training providers can achieve TQS Part B excellence certification in building services engineering without first embarking on a development journey. If you have implemented all the recommendations of this guide (or at least checked that you have a comparable process in operation), you will probably be thinking about progressing to TQS Part B assessment and certification. Before you make this decision it is important that you consider the following.

- Have you implemented **all** the processes and systems that TQS Part B requires?
- Have the processes that you implemented **had time to make a difference** to your building services engineering employer-focused provision?

4.2 Checking you have implemented all the processes

You could now revisit the readiness check and use the simple assessment again to 'audit' your newly improved provision and ascertain whether you have implemented all the required processes.

4.3 Evaluating the impact of your development actions

Evaluating the impact of your development activity is not as straightforward as checking that all the processes have been implemented. Nevertheless, it is vital that you do this before you decide to make a Part B application to give you the confidence that you will be able to generate effective outcome evidence to support your case.

You will now have a strategy that sets the challenge of high-quality work with employers in the building services engineering sector. You should ensure that your new systems and processes will allow you to prove in an application that you:

- regularly, formally and systematically consult sector employers
- regularly and formally consult sector stakeholders
- analyse your market systematically, and regularly update your 'market view'

- review your sector strategy on a regular basis
- set general strategic aims and approaches for your sector work
- set sector-specific strategic performance objectives
- deliver products and services that meet the needs and expectations of employers
- deploy expert staff and high-quality physical resources
- regularly and systemically review your performance against your sector performance objectives
- meet the needs and expectations of building services engineering employers
- are having an impact on the businesses of employers in the sector
- understand the needs of the building services engineering sector
- are having an impact on the building services engineering sector as a whole (You will need be engaged with SummitSkills to help you to demonstrate that your work with the sector as a whole meets sector needs and expectations)
- are continuously improving your products and services, staff and resources in line with sector need and expectations
- measure the satisfaction of your work with sector employers (needs and expectations)
- measure the satisfaction of your work with sector stakeholders.

If you are not confident that your sector processes and systems will enable you to provide outcome evidence for all these things you may not have fully understood the development requirements of TQS Part B. Alternatively, you may not have given your new processes time to become properly effective. Whatever the reason, you will need to clearly identify the issue and plan accordingly.

4.4 Thinking about application, assessment and certification

This development guide has deliberately avoided methodical referencing against TQS Part B criteria. The main reason for this is that it is not an application guide. It is a tool to help you to develop your building services engineering provision so that you will eventually be able to meet the requirements of Part B of the TQS and seek certification if you so wish.

The timing of your building services engineering TQS Part B application rests with you. If you have worked with this guide and believe that the development of your provision has reached the point at which you are ready to seek certification you should now refer to the application guide, which is the third part

in the 'suite of resources' along with this development guide and the readiness check. Unlike this guide, the application guide relates the evidence of your processes and outcomes to the specific criteria in the TQS Part B and will therefore assist you to complete an effective application.

In addition to using the application guide you should refer to the latest information provided by CFE, which can be found on the TQS website at www.trainingqualitystandard.co.uk. The website provides detail on a range of related topics, such as:

- how to apply for assessment
- detail of the assessment process
- how assessments will be conducted
- applicant training
- support available to providers, via the World Class Skills programme.

Appendix A: SummitSkills ‘footprint’

Typical Job Roles	Occupational Area					
	Electrotechnical	Electrical and Electronic Servicing	Heating and Ventilation	Domestic Heating	Plumbing	Refrigeration and Air Conditioning
Skilled worker	<ul style="list-style-type: none"> Electrical Installation Electrical Maintenance Audio Visual Systems Installation Electrical Instrumentation Installation Data/Communications Systems Installation Electrical Panel Building Electrical Machine Rewind and Repair Building Management Systems Installation and Maintenance Security Systems Installation 	<ul style="list-style-type: none"> Domestic Appliance Installation Commercial Electronic Equipment Installation Domestic Electronic Equipment Installation Signal Reception Systems Installation 	<ul style="list-style-type: none"> Heating and Ventilation Ductwork Installation Heating and Ventilation Industrial and Commercial Installation Heating and Ventilation Systems Maintenance Heating and Ventilation Systems Servicing and Commissioning 	<ul style="list-style-type: none"> Domestic Heating Systems Installation and Maintenance 	<ul style="list-style-type: none"> Domestic Plumbing Systems Installation and Maintenance Industrial and Commercial Plumbing Systems Installation and Maintenance 	<ul style="list-style-type: none"> Refrigeration Systems Installation Refrigeration Systems Testing and Commissioning Refrigeration Systems Service and Maintenance Air Conditioning Systems Installation Air Conditioning Systems Testing and Commissioning Air Conditioning Systems Service and Maintenance
Technical worker (Roles stated may be across occupational areas)	<ul style="list-style-type: none"> Building Services Engineering Design Engineer Building Services Engineering Commissioning Engineer Building Services Estimator Building Services Engineering Contract or Project Engineer 	<ul style="list-style-type: none"> Higher level roles as stated for technical worker Building Services Engineering Contract or Project Manager 		<ul style="list-style-type: none"> Building Services Engineering Computer Aided Design Technician Building Services Engineering Service and Maintenance Engineer Building Services Engineering Quantity Surveyor Building Services Engineering Site Supervisor Building Services Engineering Consulting Engineer 		
Professional worker						
Environmental Technologies/ Microgeneration	<p>The design, installation and maintenance of systems employing the following environmental technologies fall within the SummitSkills footprint:</p> <ul style="list-style-type: none"> Solar Water and Heating Combined Heat and Power Ground Source Heat Pumps Air Source Heat Pumps Biomass Bio-Fuels (Liquid) Rainwater Harvesting 					
	<p>In relation to the above technologies, the footprint that is primarily covered by SummitSkills is typically associated with the production of electrical energy up to 50 kilowatts, and the production of heat up to 45 kilowatts thermal.</p>					

Please note: The building services engineering sector does not include downstream (of meter) gas installation and maintenance occupations; therefore, training provision that relates solely to gas installation an maintenance occupations should not be included. Where gas training provision is offered in relation to the occupations that fall within the building services engineering sector such as gas training for plumbers, it is appropriate to include this provision within the scope of the TOS Part B application.

Appendix B: SummitSkills table of possible stakeholders and objective/needs

	Sector specific	National	Regional
Possible stakeholders	<ul style="list-style-type: none"> • Employers • SummitSkills • Professional bodies (CIBSE, CIPHE, etc) • Trade associations (HVCA, ECA, APHC, etc.) • Industry bodies 	<ul style="list-style-type: none"> • Central government (DIUS, DSCF, etc.) • Learning and Skills Council • apprenticeship managing agents 	<ul style="list-style-type: none"> • Regional Development Agencies • Regional Skills Partnerships • Regional Observatories • Skills academies • Employer forums/federations • Careers organisations • apprenticeship managing agents
Possible objectives/needs	<ul style="list-style-type: none"> • Sustainable entry routes (14–19 Diplomas, programme-led apprenticeships and employer-led apprenticeships/advanced apprenticeships, etc) • Increasing participation and achievement at L3 • Accredit the competence of unqualified or part-qualified existing workers including upskilling L2 workers to L3 • Upskilling existing qualified workers to support the installation and maintenance of environment technology and renewable energy systems • Progression and development of first-line managers • Developing enterprise skills • Wider and sustainable higher education provision including foundation degrees • Developing skills to increase business competitiveness and business development • Continuing professional development opportunities • Upskilling linked to competent persons schemes/legislative requirements • Upskilling related to health and safety requirements • Promoting a positive image of the sector and attracting new entrants including entrants from underrepresented groups • Activities or training to support specific projects eg 2012 Olympics • Reducing the use of non-economically valuable programmes, eg stand-alone technical certificates • Development of one-stop shop arrangements to serve employer needs. 		

Appendix C: Useful contacts

Training Quality Standard Team

Enquiry line: 0845 225 1310

info@trainingqualitystandard.co.uk

Website: www.trainingqualitystandard.co.uk/

Information about support for the Training Quality Standard is also available from the new Learning and Skills Improvement Service (LSIS) programme,

World Class Skills- developing employer responsiveness.

Website: <http://wcs.excellence.qia.org.uk/>

Email: wcsenquiries@kpmg.co.uk

Telephone: 0800 3286075

Appendix D: Benefits of the Training Quality Standard¹

We outline below some of the key benefits of achieving the TQS.

Informing Employer Choice in a demand led system

In a truly demand led system employers will be free to choose where they purchase their training and development solutions. It is, therefore, important to ensure that employers recognise what TQS represents and what they can expect from a provider with TQS. The LSC is working with a range of stakeholders to ensure that providers with TQS are highlighted to employers as their preferred provider. The LSC is working on The Employer Guide to Training Providers to ensure that employers with TQS are 'flagged' as being highly responsive.

Train to Gain

As the Train to Gain service is enhanced for 2008/09 it is vital that the service continues to be high performing, helping employers identify and meet their skills needs. Providers with TQS will play a major role in further raising the credibility and equality of the Train to Gain service.

Train to Gain Brokers have been made aware of providers with TQS and what this represents. These providers should be prioritised over those without the standard when referring new TTG business. The Employer Guide to Training Providers will link in with this when TQS providers will be flagged as preferred.

National Apprenticeship Service

As the apprenticeship programme expands TQS will play a major role in the delivery of responsive provision that meets the needs of the employer and the learner. Providers who have invested in a responsive infrastructure and excellence in vocational areas will drive the apprenticeship programme forward.

Framework for Excellence

The Framework for Excellence is an annual quantitative assessment of performance across all LSC funded providers. The Framework will provide an accurate, independent picture of the performance of the further education sector, validated and supported by published data.

¹ Information provided by the Learning and Skills Council

The evidence used to assess the employer views measure in the Framework will be based on a subset of the assessment criteria from TQS. Providers that achieve TQS for their whole organisation will automatically be rated outstanding across the whole Responsiveness to Employers KPA for the period for which TQS is awarded (three years).

In a reciprocal arrangement, from summer 2010 any provider that is in scope for the Responsiveness to Employers KPA may need to achieve a rating of good or outstanding in this particular area before it can apply for TQS. This alignment means providers do not need to do both.

Framework for Excellence evidence will be highly relevant to support an application for TQS, not least because the Frameworks Employer Views survey is based on elements of TQS.

The operational relationship between TQS and Framework for Excellence was agreed by Ministers in March 2007 and published in the Framework for Excellence provider guides in July 2007 and July 2008.

Capital skills prospectus: implementing the key priorities of building colleges for the future

The LSC Capital Strategy published in March 2008 had confirmed the intention to help drive increased specialisation among FE providers, and ensure that capital investment supports provision to address identified skills needs. Providers with TQS will have priority access to specialist capital funding. The capital prospectus states that 'colleges applying for capital funding will need to demonstrate their commitment to employer engagement. In most cases, colleges will need to show that, at the point of application, they have at least applied for TQS, and they must have achieved the TQS before funding is released. This requirement will apply to other providers of employer responsive provision as well.

National Skills Academies

The LSC is working with the new and emerging National Skills Academies so that they adopt TQS as their key quality criterion in selecting and working with provider partners. This will ensure that only the highest standard providers are part of the National Skills Academies networks.