This paper sets out the findings of the review of delivery models, activity levels and activity costs for the Active Leisure and Learning frameworks.

**Background**

The review of activity costs is based on a standard methodology and modelling tools that are being applied consistently across all sectors in scope.

The approach is based on:

- Access to LSC data to inform the review
- Dialogue with the sector body on apprenticeship issues
- Interviews with effective providers (i.e. those providers with good or above average inspection grades and success rates) to establish activity levels
- An expert panel meeting to review data and evidence on activity levels
- Modelling of activity costs against provider data and panel advice
- Consultation with the sector on the panel advice and issues emerging
- Moderation of panel advice by an LSC project group

**LSC Data**

LSC data from 2004/05 ILR data used to inform the review were:

**Numbers in Learning**

<table>
<thead>
<tr>
<th></th>
<th>Starts (Monthly Average 2005)</th>
<th>In Learning (July 2005)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>16 - 19</td>
<td>19+ Total</td>
</tr>
<tr>
<td>Apprenticeship</td>
<td>47%</td>
<td>53%</td>
</tr>
<tr>
<td>Advanced</td>
<td>48%</td>
<td>52%</td>
</tr>
</tbody>
</table>

Total 3,261

1,183

Source: ILR 2004/2005

*Average taken from quarterly reports (January/April/July/October 2005)
Funding Rates for NVQs and Apprenticeships

Success Rates

<table>
<thead>
<tr>
<th></th>
<th>Framework</th>
<th>NVQ</th>
</tr>
</thead>
<tbody>
<tr>
<td>Apprenticeship</td>
<td>31%</td>
<td>19%</td>
</tr>
<tr>
<td>Advanced</td>
<td>21%</td>
<td>11%</td>
</tr>
</tbody>
</table>

Source: ILR 2004/2005 Period 12

Average Length of Stay in Months

<table>
<thead>
<tr>
<th></th>
<th>Non completion</th>
<th>Framework</th>
<th>NVQ Only</th>
</tr>
</thead>
<tbody>
<tr>
<td>Apprenticeship</td>
<td>8.2</td>
<td>13.3</td>
<td>15.4</td>
</tr>
<tr>
<td>Advanced</td>
<td>11.4</td>
<td>21.5</td>
<td>22.2</td>
</tr>
</tbody>
</table>

Source: ILR 2004/2005 Period 12 and LSC Data

Framework NVQ Routes

There are a number of NVQ routes available through the framework. ILR data from 2005/06 shows the average in learning by NVQ route as:

<table>
<thead>
<tr>
<th>NVQ Title</th>
<th>Average in Learning</th>
</tr>
</thead>
<tbody>
<tr>
<td>Apprenticeship</td>
<td></td>
</tr>
<tr>
<td>NVQ in Instructing Exercise and Fitness</td>
<td>1699</td>
</tr>
<tr>
<td>NVQ in Sport, Recreation and Allied Occupations: Operational Services</td>
<td>1056</td>
</tr>
<tr>
<td>NVQ in Sport, Recreation and Allied Occupations: Activity Leadership</td>
<td>468</td>
</tr>
<tr>
<td>NVQ in Sport, Recreation and Allied Occ: Coaching, Teaching, Instructing</td>
<td>211</td>
</tr>
<tr>
<td>NVQ in Playwork</td>
<td>78</td>
</tr>
<tr>
<td>NVQ in Customer Service</td>
<td>12</td>
</tr>
<tr>
<td>Advanced Apprenticeship</td>
<td></td>
</tr>
<tr>
<td>NVQ in Sport Recreation and Allied Occupations: Operations and Development</td>
<td>503</td>
</tr>
<tr>
<td>NVQ in Sport, Recreation and Allied Occ: Coaching, Teaching and Instructing</td>
<td>303</td>
</tr>
<tr>
<td>NVQ in Instructing Physical Activity and Exercise</td>
<td>191</td>
</tr>
<tr>
<td>NVQ in Playwork</td>
<td>69</td>
</tr>
<tr>
<td>NVQ in Outdoor Education, Development Training, Recreation</td>
<td>37</td>
</tr>
</tbody>
</table>

The review was based on delivery of the Instructing Exercise and Fitness NVQ route.
Funding Rates for NVQs and Apprenticeships

The LSC has asked Skills Active to review activity levels for Operational Services and other NVQ routes in 2007.
Provider Interviews

A sample of effective providers was identified in discussion with Skills Active. These providers were interviewed during May 2006 and June 2006 through a series of visits to provider locations. A completed survey form was shared with each provider to review and update. A summary of the activities and issues emerging was shared with the providers in the interview sample for comment and feedback.

Models of Delivery

Key features of the delivery models were:

- Learners based in hotels and sports and fitness centres
- Most recruited from employed status
- Working across a range of centres – some centres with multiple learners
- Some group based with self directed materials and learning
- Assessment and support in the work place

Some learners progress from the apprenticeship to the advanced apprenticeship. Other advanced apprentices may have qualifications and experience that meet the entry requirements. The same programme is offered to all advanced learners regardless of entry.

Activity Levels

Apprenticeship:

- Learners interviewed and assessed at their work place
- A group based induction to the programme where this can be arranged
- Some group activities for Industry and Organisational Awareness with self directed learning materials and work based 1:1 or small group support
- A planned programme of group based activity for the Certificate in Instructing Fitness with self directed materials and work based 1:1 or small group support
- Group based hours between 30 hours and 90 hours – Note QCA recommended hours and LSC funded hours = 150
- Some group based key skills and work based 1:1 or small group support often delivered by a skills for life/key skills specialist in addition to
Funding Rates for NVQs and Apprenticeships

tutors/assessors

- Full-time assessor caseloads of around 1:30 up to 1:35 over a planned 12 month period

- Assessors may meet with individuals or small groups at one centre

- Monthly visits over 12 month planned duration of the framework to provide:
  - knowledge and skills support
  - complete assessment for NVQ and Technical Certificate
  - some key skills support
  - regular review sessions – at least 4 sessions of ¼ day per session
  - learner support and advice – equivalent to 1 day per learner

Advanced apprenticeship:

- Planned for completion over 24 months

- Significant programme of group based activity up to 15 days in total  Note QCA recommended hours and LSC funded hours = 300

- Self directed learning materials

- Assessor visits for Knowledge and skills development, NVQ Assessment and support, Portfolio review and assessment, Learner support, Regular review

Expert Panel

Skills Active convened an expert panel with representatives from:

- Skills Active

- Adult Learning Inspectorate

- Awarding body representatives

- A provider nominated by the Association of Learning Providers

- The consultant to the project

Expert Panel Meeting and Advice

The panel met on 28 June 2006 and reviewed the data and evidence from the LSC and provider surveys. The panel used this evidence to formulate advice on activity levels for effective delivery.
Skills Active advised that sector code 231 covers a number of occupational sub areas including:

- Instructing Exercise and Fitness
- Operational Services
- Play work

The panel noted that the data and evidence from providers was around delivery of the Exercise and Fitness programme consisting of:

- NVQ in Instructing Exercise and Fitness Level 2
- Level 2 Certificate in Sport and Recreation Industry and Organisation Awareness
- Key skills in Application of Number Level 1 & Communication Level 1
- Additional requirement - Certificate in Fitness Instruction
- One other additional requirement usually First Aid at Work

Skills Active advised that they were seeking approval for a separate sector code for the Instructing Exercise and Fitness framework but that the framework specification and requirements for delivery would remain unchanged.

The panel advised that there should be separate reviews of activities and activity costs for other framework routes where there are sufficient learners to warrant a review.

The advice from the panel was circulated to panel members after the meeting for their further comment and approval.
Expert Panel Advice - Instructing Exercise and Fitness Apprenticeship Delivery

The expert panel set out their advice as a basis for establishing the costs of a model of effective delivery. *This is not intended to be a ‘recipe’ that providers should follow.*

<table>
<thead>
<tr>
<th>Activity</th>
<th>Panel Advice 2006</th>
<th>Notes and Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Planned Time to Complete</td>
<td>12 months</td>
<td>Estimated time for effective delivery based on provider interviews and LSC data</td>
</tr>
<tr>
<td>Group based knowledge and skills</td>
<td>125 hours</td>
<td>A series of block programmes to deliver and assess the technical certificates with access to self directed learning materials</td>
</tr>
<tr>
<td>Work based knowledge and skills</td>
<td>3.0 days</td>
<td>A programme of regular visits to the work place with most visit time allocated to knowledge and skills development and work based observation and assessment</td>
</tr>
<tr>
<td>NVQ assessment and support</td>
<td>2.5 day</td>
<td>Lead internal verifier time per learner for joint assessor visits, portfolio sampling and moderation meetings and activities</td>
</tr>
<tr>
<td>NVQ quality assurance</td>
<td>1.0 days</td>
<td>Key skills delivered through work based visits with group based activity for preparation and tests</td>
</tr>
<tr>
<td>Group based key skills</td>
<td>15 hours</td>
<td></td>
</tr>
<tr>
<td>Work based key skills</td>
<td>1.0 days</td>
<td>At least 4 regular reviews of ¼ day per review with additional time for learner support and advice delivered as part of the programme of work based visits by assessors</td>
</tr>
<tr>
<td>Regular review</td>
<td>1.0 days</td>
<td>An entry programme: an interview (1/2 day), assessment (1 day) and a work based induction (1/2 day) all 1:1 time with an assessor</td>
</tr>
<tr>
<td>Learner support</td>
<td>1.0 days</td>
<td>Induction through early work based visits</td>
</tr>
<tr>
<td>Entry activities 1:1</td>
<td>2.0 days</td>
<td>Based on costs of NVQ, Key Skills and sector body certificate</td>
</tr>
</tbody>
</table>

**Note:** The allocated time for work based assessor activity is equivalent to a *full-time* assessor caseload of 1:23 where all activity is delivered through work based assessors with increasing assessor caseloads where specialists deliver key skills, regular review and learner support.
Funding Rates for NVQs and Apprenticeships

Activity Costs for Instructing Exercise and Fitness Apprenticeship Delivery

The activity costs model has been set up to compare the LSC funding in 2005/06 to the reported activity levels with the following costs assumptions:

- Group based classroom activity weighted at factor A
- Assessor employment costs weighted at factor B based on independent research on salary rates and employment costs
- Registration and Certification costs of £214 based on information collected from awarding bodies
- Costs of self directed learning materials estimated at £150 per learner

The model includes a factor for success rates and this is based on the reported 2004/05 success rates of 31% uplifted to a minimum level of 50% to reflect improvement in success rates by 2007/08.

The activity costs emerging from the review were:

This suggests that activity costs for effective delivery are below the current funding rates

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1 This is based on the LSC programme weighting factors for guided learning hours
2 A separate report on employment costs provides more details of the bands and methodology used to map sectors to employment bands
Expert Panel Advice for Instructing Exercise and Fitness Advanced Apprenticeship Delivery

The expert panel set out their advice as a basis for establishing the costs of a model 'of effective delivery. *This is not intended to be a ‘recipe’ that providers should follow.*

<table>
<thead>
<tr>
<th>Activity</th>
<th>Panel Advice 2006</th>
<th>Notes and Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Planned Time to Complete</td>
<td>24 months</td>
<td>Estimated time for effective delivery based on provider interviews and LSC data</td>
</tr>
<tr>
<td>Group based knowledge and skills</td>
<td>165 hours</td>
<td>A series of block programmes to deliver and assess the technical certificates with access to self directed learning materials</td>
</tr>
<tr>
<td>Work based knowledge and skills</td>
<td>6.0 days</td>
<td>A programme of regular visits to the work place with most visit time allocated to knowledge and skills development and work based observation and assessment</td>
</tr>
<tr>
<td>NVQ assessment and support</td>
<td>4.0 days</td>
<td>Lead internal verifier time per learner for joint assessor visits, portfolio sampling and moderation meetings and activities</td>
</tr>
<tr>
<td>NVQ quality assurance</td>
<td>2.0 days</td>
<td>Key skills delivered through work based visits with group based activity for preparation and tests</td>
</tr>
<tr>
<td>Group based key skills</td>
<td>0 hours</td>
<td>At least 8 regular reviews of ¼ day per review with additional time for learner support and advice delivered as part of the programme of work based visits by assessors</td>
</tr>
<tr>
<td>Work based key skills</td>
<td>1 day</td>
<td>An entry programme: an interview (1/2 day), assessment (1 day) and a work based induction (1/2 day) all 1:1 time with an assessor</td>
</tr>
<tr>
<td>Regular review</td>
<td>2.0 days</td>
<td>Induction through early work based visits</td>
</tr>
<tr>
<td>Learner support</td>
<td>1.0 days</td>
<td>Based on costs of NVQ, Key Skills and sector body certificate</td>
</tr>
</tbody>
</table>

**Note:** The allocated time for work based assessor activity is equivalent to a *full-time* assessor caseload of 1:30. This is lower than reported caseloads and was recommended by the expert panel as a basis for effective delivery.
Activity Costs for Instructing Exercise and Fitness Advanced Apprenticeship Delivery

The activity costs model has been set up to compare the LSC funding in 2005/06 to the reported activity levels with the following costs assumptions:

- Group based classroom activity weighted at factor A³
- Assessor employment costs weighted at factor B⁴ based on independent research on salary rates and employments costs
- Registration and Certification costs of £219 based on information collected from awarding bodies

The model includes a factor for success rates and this is based on the reported 2004/05 success rates of 21% uplifted to a minimum level of 50% to reflect improvement in success rates by 2007/08.

The activity costs emerging from the review were:

This suggests that activity costs for *effective delivery* below the current rates based on panel advice.

The activity costs for effective delivery based on panel advice are just below the level of LSC funding before any assumed employer contribution.

³ This is based on the LSC programme weighting factors for guided learning hours
⁴ A separate report on employment costs provides more details of the bands and methodology used to map sectors to employment bands
Funding Rates for NVQs and Apprenticeships

Moderation and LSC Data Modelling

The LSC has established a moderation group with representation from the Association of Learning Providers to review panel advice and activity costs.

The advice from the Skills Active expert panel was reviewed at the moderation meeting in August 2006. The panel advice on activities was used to model the activity costs and the funding rates for the apprenticeship and the advanced apprenticeship.

The group noted that there were a number of NVQ routes available in the framework and took the view that the activity costs for Instructing Exercise and Fitness should be applied across all NVQ routes pending further reviews by Skills Active in 2007.

Funding Rate Changes

The LSC is implementing changes to the funding rates based on the review and the advice on activity levels and activity costs and the decisions of the moderation group.

The changes are:

Apprenticeship

- A reduction in the NVQ 2 rate of 6.1% phased in over 2 years

- This is equivalent to a 4.4 % reduction in the overall funding rate for the framework consistent with the activity costs data and evidence.

Advanced Apprenticeship

- A reduction in the NVQ 3 rate of 24.4% phased in over two years

- This is equivalent to a 17.2% reduction in the overall funding rate for the framework consistent with the activity costs data and evidence.