



# **Evaluation of the Engineering Technicians Programme Case studies**

## **Part 1**

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# ASSA Case Study

## Introduction

The Automotive Sector Strategic Alliance is a leading provider of productivity training and workforce development to the automotive and high volume manufacturing sectors.

The purpose of the network was to develop a series of four workbooks that tackled specific productivity skills needed by technician level staff.

The workbooks cover the following topics:

1. Technician Productivity Skills Taster
2. Total Productive Maintenance
3. Visible Information Display
4. Just In Time

## Best practice issues:

- Provided modular training in a format that is easily replicated
- Material is applicable in other sectors
- The steering group was useful as a body of intelligence
- Useful to involve SMEs and partners in the development and piloting phases
- The level of the training must be decided in collaboration with SMEs.
- Contributes towards lifelong learning ethos and informs other projects
- SMEs can form a ready-made piloting facility.

## Key lessons learned:

- Sustainability has to be a consideration from the outset
- Needs to be embedded to be of lasting value – picked up by mainstream education / vocational training – and this should be one of the formal project objectives
- A longer funding period would enable more outcomes
- More time and resource is needed to develop and market a product simultaneously
- Developing paper-based materials is still relevant, and easily converted to another format
- There is an on-going demand for skills specific training

### SME example: Steptronik UK Ltd

Steptronik is an SME that offers a fast response industrial electronic repair service to all sectors of industry, including automotives. The owner / manager of the company was part of the steering group, and four of his staff took part in developing and piloting the workbooks.

*“We were happy to get involved, says managing director Peter Shouksmith **“We need foundation training and colleges aren’t interested. I have found the experience fascinating, why hadn’t anyone thought of this before? It has helped me to look again at the needs of my staff – it’s the people who count”.***

## Training delivered

**“We deliberately set out to make training more accessible”, David Warden ASSA**

The four workbooks are each made up of a number of modules (typically four), each of which takes four to six hours to complete. The ‘bite sized chunks’ approach suited learners, who were able to combine learning with other commitments. Working through the material can also serve as a training needs analysis, to determine whether or not the recruit has the basics. The materials contain quizzes at the end of each module, but also serves as a source of reference material.

**“SMEs are used to paying for training, not training materials”, Dee Stephenson**

The workbooks are currently available free of charge, and are not linked to a qualification. LearnDirect students will be assessed and certificated. The advantage of offering the material at no cost is that they are much more accessible as a result. It also provides a route for ASSA to explore other training opportunities.

***“In our industry, NVQs refer to ‘non-viable qualification!’” Peter Shouksmith***

The steering group agreed that to have a wider impact, the materials would need to be taken up by the mainstream. The lack of qualification was not a barrier to the SMEs in the steering group. In their present form, the learning materials are a powerful example of training that is of real value to employers, particularly when inducting new recruits, but that does not lead to a qualification.

***“Our message to employers has always been ‘work smarter, not harder’. So we developed materials that were pitched at a level employees can appreciate, and that make people want to learn.” David Warden***

At every stage in the development of the workbooks, SMEs contributed their opinions and many of these suggestions were taken on board. They suggested better ways to do things, for example, using a windmill to indicate if a machine’s air intake is working. Common sense, but effective. ASSA identified a strong demand for training from management level staff.

Employees from the three SMEs in the steering group were involved in piloting the training material. Two of the staff from Steptronik UK, responsible for repairs and collections and deliveries spoke about their experiences.



Employees at Steptronik  
with the ASSA workbooks

***“Training is normally delivered on the job, by learning from someone else. Going through the workbooks was fine for me, as I could do them when I had time. It has also given me more ideas about training, although I haven’t done anything about it yet.***

***“The sections about customer focus really makes you think. I’d recommend the training, especially for younger workers.”***

**“Employers have also said that the need training in specific skills, like hands on technical drawing, and we are looking at this possibility,”** David Warden

Employees from all three SMEs, along with Nissan staff, helped to develop and pilot the learning materials. The reactions of three employees, one a young graduate, one 30 year served technician and one job seeker are worth recording here. The graduate initially found the level of the training to be beneath him, but came to see the good sense contained in the materials. The experienced technician contributed to the development of the materials, and his employer has noticed that the training served as a useful reminder, and that he has now sharpened up in a number of areas. The third example, the new jobseeker, went through every step of the four workbooks, and found them *‘extremely useful’*.

Clearly, these materials will help to meet the need to upskill new recruits, but can be of value to any employee. The son of an SME owner also worked through one of the workbooks, and offered a range of comments that helped to make the lessons more accessible. ASSA is now exploring the potential to offer materials to schools.

## **Network practices**

***“The main thrust of the project was that it was geared up towards SMEs.”*** Dee Stephenson

**“We already had a network, so we did something new”** David Warden

**“Whilst Nissan is an excellent manufacturer, the project needed to be led by smaller companies and the supply chain”** John Armstrong, One NorthEast.

***“We need to encourage young people to enter the industry. We are such a specialised company so it would be great to give young people this training to do – as a foundation, then build on it. The lack of specialised training is a real issue for us.”*** Peter Shouksmith, Steptronik UK.

ASSA was already a hub in a network originally set up to serve the needs of Nissan. Now each part of the ASSA group has its own remit and all deliver productivity training. The fact that the network was seen as distinct from both ASSA and more importantly Nissan was a definite advantage. ASSA also operate a forum to regularly obtain employer views, backing up their view that ***“You have to be employer led”***.

*The sector was recognised to be in demise, and urgently requiring training capable of producing a highly skilled workforce. David says: “The network was not just about training, but meeting industry need”*.

David Warden, who led on the project for ASSA, says: ***“We targeted a very focussed area that we had identified by being on the pulse with local employers<sup>1</sup>, and from work done by One NorthEast. It is also a neglected area, the productivity skills of engineering technicians and those in high volume manufacturing.”***

One NorthEast had previously carried out research that had highlighted the need for productivity training among technicians – both new entrants to the industry and older technicians without formal training. The Business Forum also keeps ASSA up to date with employer needs.

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<sup>1</sup> ASSA is based in Washington, Tyne & Wear and has developed a business forum for SMEs in the region, through which to identify training and skills needs.

**“The steering group can tell you if you are going down the wrong road.”**

ASSA benefited from good **partnership working**. The way in which ASSA brought together and sustained a steering group is one of the major learning points to come from this network. Representatives from One North East, a competing training provider (formally from NTO National Council) and an SME met to discuss the project. Six individuals kept the group manageable, and offered constructive criticism, advice on outputs, and comments at key junctures.

The materials were developed in consultation with a steering group that included four SMEs, NTO National Council, New College Durham and One NorthEast. An external consultant who had worked extensively for Nissan also contributed his expertise. The aim was to create a product with a national reach. The group agreed that this was now in place – and it was a relatively minor job to adapt the examples to a particular industry or sector.

**“Everything we do is designed to make companies more productive”** David Warden

ASSA provides a good example of how **best practice** can be adopted. The network achieved its stated aims, and has developed training materials that have been developed in consultation with, and piloted by, SMEs and a larger company. The materials, adapted subsequently, are being taken up by LearnDirect, to reach a much larger audience of distance learners.

## **Business benefits**

***“Companies attitudes towards training are changing. They are starting to realise that the better skilled an employee is, the more valuable they are to the company”,*** David Warden.

***“It has refocused staff on the basics, so making them more efficient”,*** Peter Shouksmith, Steptronik UK.

***“A company that is productive will also have a good bottom line, with less breakdowns and returns, and so on.”*** David Warden

As the Steptronik example illustrates, it is perhaps too early to notice an impact on the bottom line as a result of working through the productivity training. Sets of the workbooks have gone out to Nissan and two of the other networks involved in this evaluation. That there will be benefits is not in question, since, the employer interviewed has seen improvement in the way his staff are working, and in combination with his new training plan, aims to maximise these benefits.

## **Sustainability**

***“The project is like a strong flowering shrub, it could spawn much more material”*** John Armstrong, One NorthEast.

The steering group recognised that the project could be taken further, and ASSA was currently exploring the means, and gaining the internal support required, to take this forward.

There were three clear options available:

- 1) Accredite the training locally, via the awarding body NCFE (which has funding available (ESF co-financing) for training at level two or above)

- 2) Explore the potential for Sector Skills Council Funding to take the benefits to other sectors (for example food manufacturing)
- 3) Look at the possibility of introducing training materials into schools

The training materials were developed with the automotive sector in mind (Nissan is a major local employer), but one of their strengths is that the format, and the productivity skills covered are potentially applicable to all sectors.

The involvement of Learn Direct perhaps confirms the potential to convert the generic materials into underpinning knowledge that would contribute towards a qualification. Within the project lifespan it was not possible to really explore these issues, due to a number of internal and external factors.

# Boldu Ltd / Frederick Woolley Case Study

## Introduction

The supply chain network of Frederick Woolley Limited, a Birmingham based, second tier supplier of pressed metal parts and assemblies and Boldu Ltd – a learning materials and training provider – has proved that, even in difficult economic times, a network can be developed that achieves a range of positive outcomes for the companies involved.

The network, led by Shirley Woolley and Boldu's Peter Sinclair, was able to build upon an existing network of suppliers, and a long track record of training and development, to push down to involve technician level staff as well as broadening the membership to include other companies.

## Best practice issues:

- Employer led network with a mix of larger companies, SMEs, suppliers and customers;
- The combination of industry and training experience to facilitate and develop the network;
- Real networking benefits derived from involvement – for example joint bids, new products and business relationships;
- A model that can be applied to other industries;
- Positive and sustained impact on the supply chain.

## Key lessons learned:

- A constant driver is required to engage SMEs and maintain their interest;
- Networking and informal learning have real value for the companies involved;
- Supply chain networks can work together to deliver quality products;
- Involving technicians empowers employees to embrace change;
- Larger companies working together draw SMEs into networks.

## Large company example: Hadley Industries PLC

The Hadley Group is a privately owned multi-million pound company of 480 people that produces cold rolled sections and allied products. Frederick Woolley acts as a supplier, and involved the company (based in West Bromwich) in the network. The involvement of larger companies is drawing other companies into the network.

Managing director Phillip Hadley says: ***“We now go to existing and potential customers as a team, which offers them the most cost effective solution. Sixty percent of the benefit is informal. I take away something from each meeting. For example, we were struggling with lean manufacturing, then saw a traffic light system at Frederick Woolley. We took that system, improved it by adding another measure, and then applied it to the whole group. It would have cost us far more in time and effort to develop the system ourselves, and now we can return the favour by showing the new look system at network meetings. You have to approach networks with an open mind, and put in some trust and faith. I'd certainly recommend the network to others, and can't see why it would fail as it has real business value.”***

## Business Benefits

The network used the DTI's own model for measuring business benefits<sup>2</sup>, as well as success factors identified by the Industry Forum masterclass.

Measures included turnover, stock turns, delivery and quality – hard business outcomes that are well known in the automotive sector. Moreover, companies can measure their own performance against a national database. Although time consuming (“this isn't getting many kits out the door”), the process was a valuable one.

**“If you try to introduce measures and evaluation too early, you will lose them [SMEs]. Once they had seen the business benefits from network involvement, then they were happy to do it. Flexibility is the key”.** Peter Sinclair

Business benefits resulted from managing directors learning from one another

## The facilitator's role

**“The learning broker's role is to act as a buffer between funders, training providers and SMEs and provide the best solution possible. Gaining the trust of SMEs is vital.”** Peter Sinclair

Peter Sinclair's background (pictured right with Shirley Woolley) in the automotive industry and his current role as head of an independent training provider, combined with Shirley Woolley's proactive approach and influential position within the supply chain proved an ideal combination for running the network. Even with this blend of skills, it has not always been plain sailing. A constant driver is required to ensure take up of training and attendance at events.

The network's direction came from the companies themselves.

**“The growth of the network should be organic, with a fluid structure that changes shape and focus over time. This network is very different compared to how it was originally. Once a company is happy with the network, they will walk away, but they will come back.”** Peter Sinclair

## Networking

***“People contact is vital”*** Shirley Woolley

The companies involved have developed relationships with one another, and meet regularly. Meetings are organised on a relevant topic – for example innovation or accessing funding. Meetings often include a site visit, where SMEs can learn by seeing how processes are applied in other organisations. As there is trust between member companies, no one is afraid to ask questions. Network meetings are also a useful form for agencies such as the Manufacturing Advisory service or MOD. A cluster of member companies are exhibiting together at a forthcoming trade fair.

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<sup>2</sup> “Quality Cost Delivery” Seven Measures for Improving Competitiveness in Manufacturing Industry (2000)

During the period the network was funded by the DTI, the Rover / BMW factory closure shook the whole of the West Midlands. One member company went bust as a direct result, while others clung on. At such a difficult time, the network came into its own as a coping / support mechanism for managing directors. Although it is difficult to attribute directly, the network was a key factor in keeping a number of member companies in business.

***“Networks can really help in a crisis,” says Peter. “We have managed to survive and grow”.***

## Impact on the supply chain

***“We are striving for continuous improvement which is high on quality and high on profitability. This requires excellence from each stage of the supply chain. The demand side has become far more demanding. Right first time is now a given.” Shirley Woolley***

SMEs are now doing business with one another, and collaborate to bid for larger pieces of work.



With a high proportion of the low value manufacturing work already relocated offshore, network members are able to work together to secure the higher value work that remains – which requires innovation, technical excellence, outstanding quality and perseverance. SMEs and customers alike have been influenced by the quality standards expected at Frederick Woolley.

Member companies are all equipped with ICT technology that enabled both Internet access and video conferencing, with on-going support to use it. Member companies were able to obtain the equipment at a good price through a joint bid submitted to the Warwick Manufacturing Group. ***“It has***

***made the companies more aware of the possibilities the technology offers, all they needed was a push,”*** says Peter.

Bringing technicians and managers together has also resulted in improved communication up and down the supply chain. Regular meetings help to maintain the initial impetus to change and improve. Member companies are considering setting up their own networks with suppliers, taking the lessons learned here and applying them elsewhere.

***“The network has proved the value of putting people in touch with each other,”*** says Shirley Woolley. ***“Just by talking to one another while training, problems are being resolved at technician level further down the supply chain.”***

### A Technician’s example

The network formed a quality group to implement QS9000 (TS16949)– the quality standard for the automotive sector. A group of technicians and quality managers met to learn from each other, and move the process along. Richard Egglestone, a production engineer at Frederick Woolley’s is part of a cross-functional team within the company that meets twice a week to enact continuous improvement.

**Richard says:** ***“We were given training by the Industry Forum – the best training I’ve done as it was so job specific. We started with the 5Cs and then progressed to quality, cost and delivery. The training is just the beginning and commitment from management is required as you have to keep on trying and learning from your mistakes. Otherwise you may fall by the wayside”.***

## Training delivered

**“Training is not a natural feature of business networks. It is unlikely to thrive unless it is part of... models for inter-company collaboration which stress trust, co-operation and mutual dependence”.** Learning Through Business Networks (DTI)

**“SMEs would rather give you money than time,”** Shirley Woolley

**“We have created opportunities for staff at all levels to get involved”,** Peter Sinclair

The network members decided that networking meetings should be the main focus of activity. This has resulted in no less than business survival for some member companies.

The majority of learning that has occurred has been informal, with members taking away tips or advice picked up at network meetings or from site visits. The on-going emphasis on quality is likely to result in increased uptake of relevant quality standards, such as QS9000. Learning could relate to process improvement, or quality, but the important point is that the learning is then applied in other companies. The network has also run training courses, organised by Boldu, on topics including ICT, productivity and health and safety. Frederick Woolley has its own dedicated training area, initially set up by Boldu. Other larger companies in the network have now followed this lead and set up training spaces of their own.

## Sustainability

**“The important thing is that businesses get to see added value and a real contribution to the running of their company”** Peter Sinclair

The Frederick Woolley / Boldu Ltd network is now financed by membership fees and funding from Accelerate. The network receives regular requests from other companies to get involved. Now the network has a track record of success, funding has become easier to obtain.

Sustainability has been achieved as a result of a number of factors:

- The skills and credibility of the project leaders – in other words combining training and industry experience;
- Using economies of scale to buy training / equipment;
- Effective partnership working with SMEs and intermediary organisations;
- Developing an existing network, rather than developing something from scratch;
- Responding to employer needs;
- Developing trust between companies.

## Next steps

The network continues to thrive, despite, or in spite of, tough trading conditions. Boldu Ltd has taken the lessons learned through its involvement in this area and applied it to a £1.7 million project, part funded by the European Social Fund under the **Equal** Community Initiative Programme, to help employers deliver training to disadvantaged groups in the workplace called “ACORN” (‘Adaptive Capabilities for Organisational Renewal through Networks’). The ACORN project will see Boldu moving beyond the automotive sector into food and drink and jewellery manufacture. Six networks will be created across the UK. Partners include City College

Birmingham, the Open University, Liverpool John Moore's University, ISCAN Ltd and Crystal Presentations Ltd.

# Bolton Institute Case Study

## Introduction

**“There was a real need for a Foundation level course that used distance learning to serve a wider area.”**

The Engineering Technician Network run by the Bolton Institute achieved its revised aim to produce NVQ Level four training for the textiles, clothing and footwear industries in the form of a distance learning foundation degree. The first of its kind in the UK. Foundation degrees are the Government’s new vocational higher education qualifications. The network, which worked alongside partner organisation NWTEXNET successfully developed and implemented a modular course, delivered on-line to technicians / supervisors and managers. Students were identified by NWTEXNET or by the companies themselves.

The Foundation degree takes between two and three years of part time study to achieve. Students typically study two modules per 14-week semester. There are a total of 12 modules. There is some freedom with regard to the order in which they do them but if they want the final award they must do them all. Students who are not interested in the award but who wish to study individual modules for information (effectively an on-line short course) are free to do so. The academic content is delivered over the Internet for the first half of the module (accessed via <http://www.bolton.ac.uk>), with the second half spent applying the lessons learned in the workplace. The course is backed up with three day-release sessions per module. 12 students are currently enrolled on the programme.

### Best practice issues:

- Learning that meets the higher level skills needs of employers;
- Industry specific training materials delivered on line, the only one of its kind in the UK;
- A developed system of student support both inside and outside the company;
- A flexible system enables students to apply their skills where they work;
- The ‘novel educational methodology’ is applicable in many other sectors.

### Key lessons learned:

- Distance learning requires fewer students to be financially viable;
- Face to face contact is still very important;
- Materials need to be regularly updated, which is expensive;
- Working with industry partners gives greater credibility to HE institutions.

### A key partner perspective: NWTEXNET

NWTEXNET was created, using North West Development Agency funding, to identify clusters of textile companies, then maximise the links, impact and influence with the region’s other wealth creating sectors. Managing Director Trevor Rowe says:

***“The textiles and clothing sector has over 2,000 companies and employs between 50 and 60,000 people. Lack of training is a major issue across the sector. Our role is to offer business support to these companies, and to upskill the sector by offering the Foundation degree. We are involved in starting an incubator unit to encourage start-up businesses, and looking to secure funding to develop the Foundation degree in other sectors and for lower level staff”.***

## Designing Training materials

***“Its easy to under-estimate the time it takes to develop learning materials, and the high maintenance costs involved in keeping them up to date”, Dave Hill***

Staff from the Department of Product Design and Development at Bolton Institute, led by Course Leader Dave Hill, designed the training materials. Textiles at Bolton Institute can trace its origins back to the latter half of the 19<sup>th</sup> century. Although the importance of the industry in the Northwest has declined markedly since then, Textiles Product Development is still the leading research area within the institute, with the bulk of the funding coming from industry. Dave Hill’s background is as a production technologist within the industry and in product development at the Institute.

**“We have been trying to do this for a long time,” says Dave. “The North West textile industry hasn’t always recognised its common interests and the importance of working together. NWTEXNET, with its strong links with education and industry, was an ideal vehicle for us to develop our knowledge of cluster developments and deliver training that was identified as important by employers. There was a real need for a course that used distance learning to serve a wider area and which was at the right level.”**

The modular course includes both technical and commercial skills, and covers the following topics:

1. Science and technology;
2. Methods of manufacture;
3. Health and safety;
4. Marketing and the consumer;
5. Design principles;
6. Textile supply chain;
7. Processing routes;
8. Business studies;
9. Environmental issues;
10. Product evaluation;
11. Product development;
12. Personal development.

## Implementing Distance Learning

**“It is fair to say that the textile industry regrets the passing of local day release provision”**

**“...We can now include people who would never have accessed full or part time higher education at all.” Dave Hill**

The Bolton Institute is now working with the Sector Skills Council, “Skillfast-UK”, to develop the training materials and make them relevant to other sectors. The realities facing the textile industry means that there is little training provision available to the regions, because there are simply not enough students to make it financially viable. Machine manufacturers are best placed to deliver highly specialised technical training in the workplace. The advantage of operating a distance learning course is that it can operate with as little as five students, whereas a traditional course would require a minimum of 15.

A decision was taken early on that it would not be possible to develop materials specific to each of the different sectors of the UK’s textile industry (which tend to be regionally based, for example, cotton in Lancashire, wool in Yorkshire and linen in Northern Ireland). This was too expensive and time consuming. Instead, an innovative method was devised whereby each of

the modules was split into two parts; the first theory applicable to all parts of the industry, and the second half required the student to apply this learning wherever they worked.

**Dave Hill says: “Each student can have a unique learning experience. The materials are delivered using CDs, web-based interactive lessons and online discussions, then students agree a learning contract to apply the material to a specific work context.”**

**“Studying online doesn’t suit everyone. Students have to be self-motivated and make use of the supportive tutor system and employer mentors. The upside is that we can now include people who would never have accessed full or part time higher education at all.”**

## Business Benefits

**“The ability to benefit is one of the key criteria. We can only successfully offer training to employers once they acknowledge that a need exists.”** Dave Hill

The training materials were being developed at a time when there was a shortage of training at NVQ level four (higher technician / manager) level. By applying the knowledge to their own situation, students are in a position to use their new knowledge to bring about business benefits. The training materials are validated by the Institute itself, which ensures the quality of the course and enables the materials to be more industry specific and matched to the needs of employers than would be otherwise possible. The result is a more versatile workforce. Distance learning means that students are off-site far less, and thus contributing to the business. No employers have quibbled about paying the course fees, which are set at £170 per module, and employers receive a formal progress report every three months.

## A Technician’s Perspective. Kelly Harvey: Perseverance Mill Ltd



Kelly (pictured left) has worked for Perseverance Mill for five years, since she left school. Perseverance Mill Ltd, located in Burnley, designs and manufactures fabrics and finishes for the high performance outdoor market. Kelly has worked her way up to the post of design technician, and her role includes the design and testing of materials.

Kelly was one of the very first entrants on to the Foundation degree, and has completed four modules to date and is currently studying for numbers five and six – health and safety and design principles.

Perseverance already used Bolton Institute for its day release HNC course, and a manager referred Kelly to the Foundation degree. The

first seven weeks of the modules (studied two at a time) deal with the theory, and in the second seven weeks the lessons are applied in the workplace.

Although she has experienced teething problems associated with any new course, she is generally happy with the course so far. **“I really want to get my degree, and that is what motivates me”** says Kelly. **“Although you can feel isolated on the course, it is good to have something to work towards.”**

## Sustainability

“The Institute is now serving a wider area and tackling the regional need for part time courses. We are now looking at cluster development in creative industries and how the materials developed by this network can be applied in the clothing and footwear sectors” **Dave Hill**

The network achieved its objectives and this project has now finished. The end result was a set of materials, indeed a course, that can be taken forward within the textiles industry and applied in other sectors besides.

### **Working in partnership: Skillfast-UK**

**“Working with the SSC means we are now part of the bigger picture” Dave Hill**

The Sector Skills Council for the Apparel, Footwear and Textiles Industries, Skillfast-UK has been involved with the network since its inception last year.

Celia Thornley, Workforce Development Co-ordinator for Skillfast says:

**“Distance learning has been identified as one of the best model to serve the sector. The model piloted by the Bolton Institute has the flexibility employers want, and the interactive elements that all sectors want, and the footwear industry is particularly keen on.”**

The SSC funded three trainees on the course, and received encouraging feedback from all three. ***“The trainees thought the modules were relevant and appropriate to their job roles”, says Celia.***

***“We have to accept that the industry is global, and give companies flexible training that helps them remain competitive, and thereby to keep high level skills and expertise in this country”.***

The SSC is seeking to encourage partnership working, so that the learning responds to sector needs appropriately. Skillfast-UK and the Bolton Institute are now in the process of developing additional modules to extend the Foundation degree to the clothing and footwear industries.

**“The training model offered by the Bolton Institute is an opportunity to take open learning to a new level within the sector. We are now encouraging companies to consider this delivery mode as a way of developing skills to remain competitive”**