

Training & Skills Report 2009



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Foreword

No one needs to be reminded that this has been a very tough year for the economy in general and broadcasting in particular. It is clear that in the companies within the co-regulatory system the number employed has fallen from around 69,000 to 61,000. And yet the unbroken upward trend of improvement in Training & Skills provision has continued, though there has been some slowdown in progress in 2009. We consider that even the very modest progress this year is quite an achievement given the unprecedented economic pressures. Standards of training and development continue to be high, with an increasing number of broadcasters operating at Medium or High levels of provision. However, it is still proving challenging to make a significant step change to move companies operating at Base level to Medium and so ensure that training is delivered effectively across the industry.

We have now visited all 70-plus companies obliged to make returns and will now move to a rolling programme of validation visits so that the process and consequent support and encouragement can be more focussed. There is some evidence of a diminished spend on outside Trainers, so it is all the more important to ensure that companies are able to deliver the necessary training themselves. The challenge is to link the training strategy to the business plan. What is this company trying to achieve? What skills does it require to achieve it? And so on. But once having made that link, the appropriate evaluation systems need to be in place to ensure that the full benefit of the training is realised by the individual, the team, the company.

We will aim to improve our support material and also help provide a benchmarking system to stimulate progress. The BETR will be working with the broadcasters to improve performance. We have an ambitious plan to make the people development in broadcasting website (www.pdib.co.uk) the prime resource for the L&D Professional in broadcasting. After four years of a full co-regulatory model the BETR Board will be conducting a thorough review of the co-regulatory framework and later in 2010 will present to the industry and Ofcom our suggestions for any change to the existing structures and systems.



Stephen Whittle
BETR Chair



Format of the Report

This report has four sections.

The **Executive Summary** is a two-page document highlighting the findings from this year's self-evaluation and validation round, with key points for both broadcasters and Regulator to note.

The main report is in three sections.

Part I is the full body of the report, giving an analysis of the returns for 2009, complemented by commentaries by the Validation Team on the validation visits. There is also a section on the UK training environment and the broadcast industry context in which the L&D Professional has to operate. It reviews the data gathered in some detail, but for those with limited time we recommend they read the Conclusions and Recommendations section.

Where possible and practical, 2008, 2007 and 2006 data have been compared with this year's returns. To keep the report short and aid clarity, we have moved all graphics and detailed data to Part II.

Part II (available as PDF from Reports section of www.betr.org.uk)

Part II sets out the strand summaries in detail, with key statistics and analysis based on the four years (2006 – 2009) that data has been collated using the self-evaluation model. It has been provided for readers who wish to review the source data that underpins Part I. The data is presented over the four years and is segmented by Radio and Television. A bullet-pointed summary analysis for each year is provided at the end of each graphic segment. Two summary histograms are also provided.

These are:

1. A percentage performance rating of **None**, **Base**, **Medium** or **High** across the four years of the self-evaluation model to date.
2. A comparison between **None** and **Base** vs. **Medium** and **High**, also over the four years examined.

These last two graphics show the overall trend and change in performance.

Part III Appendices (available as PDF from Reports section of www.betr.org.uk)

The **Appendices** make up the final section of the report and provide further details on the self-evaluation grid and the broadcasters who received a validation visit in the first half of 2010. It highlights the sections of the 2003 Communications Act that apply to this work. Finally, it acknowledges those who contributed to this report.

Executive Summary

In 2009, 72 broadcasting companies, 16 Radio and 56 Television, submitted a self-evaluation report. This is the fourth year of the co-regulatory system and it has reached a significant milestone. It is now possible for us to see some trends over the period and report on the progress broadcasters are making to train and develop their people and to evaluate what they do.

The reporting process itself has been refined and streamlined in response to broadcaster feedback. Reports are now in a fully online format and guidance and other support is also available online. We are now able to report 100% compliance by participating broadcasters in the T&S co-regulatory process.

Once again self-evaluation is monitored through independent validation; this remains an essential aspect of our work. This year nine companies received validation visits, conducted by Independent Consultants, with support from the BETR, bringing to 71 the number of companies that have now been visited over the four-year period. The BETR plans to move to a rolling programme of validation visits from now on, with a closer focus on poorer performers and new Licensees. A number of High-performance working practices were identified through the visits and elements of High provision were noted in all seven strands of the self-evaluation framework. The case studies received during the validation process will be collated and added to the Training & Skills Case Study Portfolio. Discussions with individuals within companies revealed that knowledge of available sector resources is very patchy. This is a concern.

This report reviews the challenges broadcasters set the BETR this year. Some of these were around better communication, promotion and sharing of resources. We have used Web 2.0 social networking tools, and set up a new people development in broadcasting website (www.pdib.co.uk) to meet this stated need. The BETR has been disappointed by the early level of response but will continue to focus on this area.

In last year's report we noted the decline in training budgets as a worrying trend when the recession began to hit. Information gained through company visits, although statistically too small to draw firm conclusions, suggests that this trend continues. This is in line with surveys from the Chartered Institute of Personnel Development and from Skillset.

Despite the economic climate, overall performance by broadcasters continues to improve, continuing the trend seen over the four years the BETR has been carrying out its work. Now more than one third of companies are placed at a High level of provision, with nearly six in ten at a solid Medium level of performance. However, there is a stubborn cluster of Low-performing companies.

Looking more closely at the individual strand of evaluation (see back cover for details), the BETR notes that:

Strand 1 – Some companies still struggle to link Learning & Development to overall business objectives; a basic building block of successful and efficient provision.

Strand 2 – Generally Radio and TV companies report a good level of provision in ensuring staff are equipped to contribute (induction). There is continuing concern that there are still some weaknesses, especially in supporting existing staff into a new role or when returning after a period away, for example, from maternity or paternity leave.

Strand 3 – More companies are moving to a High level with performance review processes, but this is patchy. It is challenging for some broadcasters to move beyond systems to assess salary and bonuses.

Strand 4 – Provision of on-job training is still one of the poorer performing strands, surprising given the increased reliance on on-job training, as a consequence of reduced budgets. This may be explained by difficulties in recording and evaluating sometimes informal on-job training and development.

Strand 5 – Most companies are evaluated as providing a Medium level of provision of off-job training. There is progress over the past four years, but Radio companies are apparently static on this strand this year.

Strand 6 – A gradually improving trend in communicating with staff.

Strand 7 – Evaluating training and development activity is still the most challenging strand for broadcasters but very significant improvement has been recorded by Radio companies in the past four years.

Overall, while there has been a substantial and unbroken upward trend during the past four years, there has been some slowdown in progress in 2009, but this may reflect the difficult climate in which Learning & Development Teams have been operating during the recession. We consider that even the very modest progress this year is quite an achievement given the unprecedented economic pressures. Standards of training and development continue to be high, with an increasing number of broadcasters operating at Medium or High levels of provision. However, it is still proving challenging to make a significant step change to move companies operating at Base level to Medium and so ensure that training is delivered effectively across the industry.

The BETR is pleased to report that overall the number of Low-performing TV companies has dropped from 14% to 4% of companies, and with Radio there is just one Low-performing company. Last year we noted that the dominance of three major players in Radio was having a beneficial effect, in sharing the rigorous systems of the parent company and improving capabilities of all the companies under their umbrella. We believe this continues to be reflected in the progress in Radio.

Part I



This is the fourth annual report on **Training & Skills** in the Broadcast Industry produced by the BETR based on broadcasters' self-evaluation returns and supported by validation visits. This report covers the period January to December 2009. It is based on the data request made by the BETR to broadcasters in January 2010. It sets out what our work means for the companies covered by our remit and, in turn, the Learning & Development opportunities that are available for the people who work for them.

Introduction

Firstly, for those new to our work, a reminder of our role within the co-regulatory system. This was set up under the auspices of the Communications Act of 2003, and empowers the Broadcast Equality and Training Regulator, formerly the Broadcast Training and Skills Regulator, in partnership with Ofcom, Skillset and broadcasters themselves, to ensure that the industry provides training and development opportunities to its people. This should be relevant, inclusive and cost-effective, so that companies grow, talent is nurtured and shared, and high-quality services to audiences are supplied. This is in line with broadcasters' licence conditions or obligations.

Under this system broadcasters agreed to comply with the co-regulatory partnership and to measure the effectiveness of their Learning & Development through a process of self-evaluation. This has been facilitated and structured using a framework developed by the BETR, which captures where broadcasters place themselves across seven key strands. These seven strands are designed to challenge and support broadcasters to measure their own performance as individual organisations and also to enable comparison across the broadcast industry.

The self-evaluation grid is presented at the end of Part I of the report.

For a more detailed view and explanation of the grid see Appendix 1. This model has now been widely accepted by the industry.

This is the fourth report produced under this system, and the first under the new name of the BETR, whose work now also encompasses Equal Opportunities monitoring. We expect in future to dovetail this work and move towards a single report, but for this year at least, the two strands of our work are reported on separately; this report is on Training & Skills alone.

Broadcasters' self-evaluation is validated by a programme of visits by Independent Evaluators. This year sees the completion of the round of visits and is a significant milestone, enabling the BETR to review its progress. We seek in this report to make a preliminary assessment of the impact we have made, and how we may continue to support broadcasters to improve their training and development provision.

Broadcasters Covered by the Report

Broadcasters with more than 20 employees are required to submit a return to the BETR, otherwise they must claim exemption. In 2009 there were 72 companies reporting: 16 Radio and 56 Television. Although the total number was very similar to 2008, when 70 companies reported, industry churn and mergers have meant there is some change in the actual companies reporting.

We have 100% compliance. This enables us to be confident in what we report, and the broad conclusions we draw. Such a return is almost unheard of with conventional surveys. However, some caution should be exercised by readers, as a small number of broadcasters, either changing their status, improving their provision, or otherwise, can have a large effect on the overall result. Changes in personnel with reporting responsibility within a company can also impact on reporting.

Under the co-regulatory model the request for information is in the first instance made by the BETR but, should companies fail to make a return or claim exemption the matter will then be passed to Ofcom to take action as appropriate.

Revisions to the System

We continue to develop and refine the reporting system in response to broadcaster feedback. Last year the self-evaluation framework was converted into a full online reporting tool and an online Self-evaluation Guidebook linked to the reporting tool was developed to provide reference definitions, good practice guidelines and case studies. The Guidebook is freely available on the web to anybody who wishes to use it (see <http://www.ldinbroadcasting.co.uk/gb/>). The Guidebook includes a facility for all users to recommend additional links, such as training programmes and good practice examples. The Training & Skills Case Study Portfolio has been significantly revised and updated. It is also available online and as part of the BETR DVD, which holds all published documents.

Once again a section was included in the return with further questions from our co-regulatory partner, Skillset, which is used for their wider research.

Challenges for 2009 Reviewed

In last year's report we set out some challenges for both the broadcasters and for the BETR. We are pleased to see that there are some real changes in performance, especially amongst the Medium and High-performing companies. This is to be celebrated and, indeed, some of the best performers have been recognised through the National Training Awards. We congratulate the 2009 Winners of the Broadcast Award: Global Radio, Ideal Shopping Direct and LincsFM. Their presentations and award entries can be found on the BETR website and on YouTube see: www.youtube.com/user/betradmin

At the lower end of performance, however, there are still some companies who are finding it difficult to improve the quality of the provision they are offering to their staff to improve their capabilities and skills within the organisation. It is also clear that our ambition to encourage and improve the approach to Performance Management and decouple it from the implicit assumption that it is linked to salary and bonuses, is still to be realised. We did set up some opportunities both at the L&D in Broadcasting Conference and at a one-off event in partnership with Skillset, to enable broadcasters to attend development events on evaluation and return on investment

(ROI), but it is still challenging to engage broadcasters with this and to convince them that real benefits can accrue for their company by improving Performance Management and evaluation. Despite some disappointing responses to our initiatives, we will continue again to focus on this area in more detail in 2010 and into 2011.

Broadcasters in turn set the BETR the challenge of improving our communication with them, and so widening the knowledge of the support and resources we could bring to bear.

Many broadcasters told us they wanted a networked community, particularly through the use of Web 2.0 tools.

So in response we:

1. Established a LinkedIn network <http://www.linkedin.com/groups?mostPopular=&gid=147556> <<http://www.linkedin.com/groups?mostPopular=&gid=147556>>
2. Formed a subgroup of the Learning and Skills Group (LSG) <http://learningandskillsgroup.ning.com>
3. More recently, established a people development in broadcasting website (www.pdib.co.uk). This provides a portal and one-stop shop for colleagues involved with Learning & Development to find and gain access to other resources.



Broadcast Industry Environment and Economic Context

The UK Employment Landscape

According to the UK Commission for Employment and Skills, between 23–24 million people are in employment overall. It is generally an ageing workforce, with 40% aged 45 years old or older and with a growing proportion of the over-60s still in work.

We are an economy based on small companies; an extraordinary 95% of all companies employ fewer than ten people.

Broadcasters are members of two overlapping sub-sectors of the economy, which the government expects to be drivers of growth and recovery in the next few years. The first of these are the so-called Creative Industries. These include Film, TV, Radio, Photo Imaging, Interactive Content Design, Publishing, Computer Games, Advertising, Cultural Heritage, Music and the Performing / Visual Arts.

Their contribution to the economy is estimated at around 6% of GVA (gross value added) or around £60 billion per annum, and the government estimate is that they employ around 1.5 million people.

The second sub-sector is the so-called Digital Economy. This has two components: the Technology and Content Industries, including the Creative Media and covering: Film, Animation, Commercials, Pop Promos, Corporate Production, Facilities and Interactive Media, Advertising, Music and Design. Exports from this sub-sector total £7 billion per year and it employs approximately 930,000 people. NESTA (National Endowment for Science Technology and the Arts) reported in 2009

“that between 2009 and 2013 the UK creative industries, which are responsible for films, music, fashion, TV and video games production, will grow on average at 4% – more than double the rate of the rest of the economy. By 2013, the sector is expected to employ 1.3 million people, likely to be more than the financial sector”. This remains their view.



Skillset, the Sector Skills Council for the Creative Industries, has a growing footprint and its reports cover broadcasting, both Television and Radio, in this wider context. It is worth noting that Skillset’s Employment Census for 2009 (available to read in full at www.skillset.org/research) suggests inter alia:

- Employment within both TV and Radio broadcasting has decreased over the past three years, with particularly marked falls in Terrestrial Television;
- The age profile of employees in broadcasting is younger than in the overall UK employment landscape – especially in the Cable & Satellite broadcasters, where the mean age of employees is 37.2 years.

The BETR’s co-regulatory remit currently covers almost 61,000 staff within 72 TV and Radio companies with more than 20 staff. For more details on the workforce please read the BETR’s report on Equal Opportunities.

Terrestrial Television

This year demonstrated the remarkable resilience of Television, in the face of the worst economic climate for at least 30 years, and arguably since the birth of the medium. Ofcom's communications research suggests that in hard times Consumers prioritise their Television, Radio and phone consumption: they are the new 'essentials', it seems.

The commercial Terrestrials: ITV, Channel 4, Five, GMTV, STV, UTV, and S4C were all challenged by the decline of their advertising revenues, the traditional staple of their business model, but viewing by audiences stayed high. ITV enjoyed a particular revival in its audiences through its top-rating entertainment programmes, such as the X Factor, and Britain's Got Talent. This live and interactive event television developed into truly multi-platform phenomena, through social networking websites, mobile phone and digital channel spin-offs.

Terrestrial Television was in some ways, though, treading water. The debate over the future of public service broadcasting, and in particular, of ITV's regional news provision, of Channel 4 and Five's long-term sustainability, and of the role and size of the BBC, was not resolved even by the long-awaited publication of the government's Digital Britain Report. There were also changes at the top of both ITV and Channel 4, and moves by RTL, Five's owners, to sell the company.

With some key regulatory and ownership issues still to be determined, it was clear that the digital and internet revolutions continued to gain pace. The terrestrials were all positioning themselves for the fully digital future, planning to grow audience share through their digital channels, available free to air, through Freeview and Freesat, as well as seeking new revenue streams and / or audiences through multiple platforms.

The BBC, with its relatively recession-proof licence fee, was at the forefront of this multi-platform charge. Its iPlayer continued its extraordinary growth. The BBC, in

preparing the ground for the next licence fee review, sought ways to make its resources more widely available through a range of partnerships. Although not all of these developed successfully, there was notable progress in the training and development area. The BBC Academy and College of Journalism made a growing amount of material openly available on their website.

Cable & Satellite Broadcasting

The Cable & Satellite sector is extraordinarily diverse, covering as it does global multimedia conglomerates, through to small companies, catering often very successfully to niche markets, whether of interest or minority ethnic communities. For many the economic context was as challenging as it was for the Terrestrials, although those with a subscription business model were a little more protected from the storm of recession.

For the largest player, BSkyB, 2009 was another good and very profitable year. Their success was driven by increasing subscription revenue, not just by increasing audiences, but also by turning technological innovation into revenue generation. By the end of 2009 sales of High Definition subscriptions had doubled in a year to 1.3 million.

No sooner had customers got used to HD, 3D started to become the new big thing. Hollywood's blockbuster successes, such as Avatar, were followed remarkably quickly by pilots of 3D for Television, in sport for example. While there were many 3D sceptics, it was clear that technological innovation was never going to stand still.

Multichannel broadcasting, while dominated by BSkyB and Virgin Media (who put their channels up for sale this year) is still characterised by diversity. Niche audiences, whether of interest or ethnic group, may be more loyal than general audiences. In the face of recession, while there were some redundancies and some churn, the large majority survived, even if they did not thrive, in this most difficult of years.

Radio

As with Television, the main story this year was of resilience and of remarkable audience loyalty. This was a year of stabilisation for commercial Radio after the consolidation of the industry into the fewer, bigger groups that had been formed by the mergers and acquisitions of the previous two years. BBC Radio continued its strong performance, with some concern from its competitors that some of its networks, notably Radio 1 and 2, were making too great an inroad into their market.

As with TV, there were two main trends evident from the recession, one positive, and one negative. The positive was the growth in listening, on both analogue and digital. RAJAR figures indicated that Radio remained one of the most popular media, with nearly 46 million people tuning in every week, and with some 31 million people tuning into a commercial Radio station.

The downside was the decline in advertising revenue, which hit Radio early, as well as the

growth of competition for buyers' decreasing budgets from the internet and mobile media. There were some encouraging signs by the end of 2009 that revenues might be bouncing back; commercial Radio reported 7% growth in the last quarter.

Whether recovery would be sustained into 2010 was still to be seen, but the more structural changes in the industry continued. The move to digitalisation, both of platforms and content creation continued. RAJAR reported that 20% of Radio listening was via a digital platform by the middle of the year, and Ofcom surveys suggested that nearly half the population claimed to own a digital radio.

The Digital Britain Report and the Digital Economy Bill, which became law in the dying hours of the old Parliament early in 2010, set a framework for Radio to move to a digital future, with the possibility of a switch-over in five years or so. The Radio industry welcomed this bill, giving, as it said, greater certainty and increased flexibility for Radio.



The Co-regulatory Process

Self-evaluation

The self-evaluation strands provide a structure for broadcasters to identify where they perceive themselves to be in relation to a grid of four distinct levels of provision: at **None, Base, Medium** or **High** (see back cover and Appendix 1). Over the last four years guidance and workshops have been provided by the BETR to explain the process of self-evaluation. Workshop presentations are available on request from info@betr.org.uk. The self-evaluation grid is now an established diagnostic tool for broadcasters to use to review their internal processes. The conversion to an online format has had the added benefits of enabling broadcasters to look back on their previous year's rating and look at their accompanying narrative. The system also enabled shared contribution and editing within a company.

Self-evaluation is supported by the online Self-evaluation Guidebook. This document, to which broadcasters themselves are encouraged to contribute online, provides expansions of definitions of the self-evaluation levels, together with examples, and also provides suggestions towards good practice. Broadcasters are only just beginning to realise the potential of the Guidebook – and renaming it 'Guidebook to Good Practice' might help indicate what it can do – but already it has the potential to become a highly effective tool to support self-evaluation and further development. We are considering whether it might be possible and worthwhile to enhance the Guidebook and the self-evaluation tool to enable broadcasters to log on and check and update their own company progress throughout the year – potentially making the application of self-evaluation even more effective.

Each year, as part of the review process for self-evaluation, all broadcasters who are required to complete a self-evaluation return are invited to a feedback session at Ofcom. This year was no exception and the meeting took place on 14 June 2010 at Ofcom in London. Representatives from some 17

broadcasters attended the presentation and workshops for the morning. The general consensus from the event was that it was informative and useful to hear the headlines from the report and the feedback received by the BETR was very helpful in ensuring that the information and approaches we were presenting to the broadcasters were useful and valid. The workshop sessions not only provided a good opportunity to take soundings from broadcasters but were welcomed as a very useful networking event.

The workshop debates focussed on the following questions:

- Is the data we (the BETR) are presenting valid?
- What are the challenges for them as a company as well as an industry?
- What should the BETR be doing to support and encourage change in the Training & Skills remit of companies in the industry?

These three questions have informed this report and also inform the observations and recommendations we make.

We see these feedback sessions to industry and the opportunity for broadcasters to feed back to us as a vital component in the development of a more effective self-evaluation process for the following year.

It is useful to note the mix of companies that we are working with through this self-evaluation process. Although we have the obvious and clear-cut division between Terrestrial, Cable & Satellite and Radio companies, we have companies that fall within our framework that are not what many would call traditional broadcasters. We have companies such as Arqiva and WRN, who are both service providers to the industry and between them employ many thousands of staff. There are also companies who are subsidiaries of multi-nationals and their main role in the UK is to provide a sales and marketing function for airtime for programmes that are assembled and transmitted abroad to be re-transmitted

within the UK. Whilst we do not differentiate between them in terms of the way that they work with their staff, given that they are all required to work under UK legislation and therefore terms of employment and contract and, with that, the HR processes they apply, we have to take on board that the range of skills and capabilities that many of these companies demand differs significantly from the majority of broadcasters.

So this year for the first time we have also considered the types of companies that we work with in the co-regulatory partnership. This enables us to differentiate between not only those who are Terrestrial, Cable & Satellite and Radio, but also service companies and sales and marketing organisations. This is a way of analysing the data and seeing if there is any significant difference between these models of business operation.

The returns from the 2009 self-evaluation reporting round, substantiated and moderated by the validation visits, plus feedback from broadcasters, provide the primary data for this report.

Validation

This year validation visits have been conducted on nine companies thus far; a relatively small number as this programme effectively completed the first full round of validation visits. This makes a total of 71 companies visited over the four-year cycle.

Validation visits were led by two Independent Learning & Development Consultants (see Appendix VI) and supported by a member of the BETR Board or Core Team. In general, each validation visit sought to capture evidence to substantiate the self-evaluation assessments made and also the views of representatives and employees within each organisation, as supporting evidence. Outcomes of the validation visits have helped broadcasters to better understand what differentiates them from others, identified good practice or provided broadcasters with an agreed action plan and ongoing support.

“I would like to pass my thanks to the Validation Team for the constructive way in which this process has been completed. I have spoken with my CEO and he is keen to take forward the suggestions that you have made, and I look forward to your contact in the autumn.”

All broadcasters visited were supplied with a summary report of the visit, which detailed the key outcomes and recommendations. This was agreed by them before being finalised and formally submitted to the BETR.

The summary report offered to each broadcaster visited during the validation process included the following information:

- A profile for each broadcaster outlining background to the organisation and key activities in the last year.
- Details of the validation visit and core contacts at the broadcaster and within the Validation Team.
- A brief description outlining the validation visit day.
- Observations from the self-evaluation form review, including an assessment by the Validation Team, identification of evidence to support broadcaster ratings and developmental actions identified in discussion with broadcasters.
- Other information to support details regarding training priorities, and the Skillset questions (where applicable).
- Areas of strong performance / good practice identified or an ongoing action plan with BETR support agreed.
- Quantitative data including training budget, turnover and staff numbers.

The value of the validation visits was, as last year:

- To encourage and support broadcasters in their Training & Skills development work;

- Yet to challenge broadcasters robustly where limited or no progress has been made;
- To allow the time and opportunity for a full dialogue and for questions to be raised;
- To recognise innovation and the continued contribution from Human Resources and Training and Development Professionals in the sector, and,
- To recommend improvement and give practical advice, such as the Good Practice Partnering Scheme¹, as to how companies could build upon existing successes.

In early 2010 the nine remaining companies visited were very different in both size and positioning within the industry, and it is therefore neither straightforward nor appropriate to draw firm 'conclusions' based on the sample the Validators saw. The following comments, even if only based on one or two visits, may nevertheless be of interest.

Our Validators set out their observations below.

As advertising rates decline, it is naturally difficult for locally based commercial broadcasters, particularly Radio stations, to maintain their level of investment in staff and in their Learning & Development. A majority of those companies visited had introduced a pay freeze, for example, and some had reduced (or even abandoned) expenditure on off-job training. Many companies are considering approaches to Learning & Development that were either cost-free or involved opportunity costs only; it would be unreasonable for the BETR to expect formal training expenditure not to be hit in the current recession.

On the other hand, there is a great deal that can be done to boost colleagues' Learning & Development that does not involve direct costs, as the next three paragraphs illustrate.

First, effective induction need not be costly, and ensures that when new staff are taken on (or existing staff take on new roles) they are quickly put into the best possible position to make an effective contribution to the business. Setting clear objectives for induction can help reassure new colleagues that too much will not be expected of them in their first weeks, and (on the other hand) can also help ensure that any difficulties that arise in those early weeks can be identified and promptly acted upon.

Next, on-job training can be as valuable as off-job training, particularly if it provides the opportunities for effective skills development, internal secondments / experience (which can be quite brief) and the acquisition of new skills that may be needed later. We saw some companies that were being creative in the preparation of staff now to meet post-recession challenges. The important step here is to ensure that competences gained in on-job training are recorded (securing evaluation of impact in a light-touch way): this can be done in a very simple fashion through performance review and using role specifications that include lists of skills and recording when these skills have been demonstrated to a Supervisor's satisfaction.

Finally, annual performance reviews should most definitely not be abandoned simply because of a decision not to award pay increases or performance bonuses this year. Performance reviews are far more than pay reviews, and indeed there is an argument for decoupling the two even in good years, when money for pay increases is available. At its simplest, an annual performance review need contain only three questions:

- What can the company do for you (and what has it done so far)?
- What can you do for the company (and what have you done so far)?
- What do we (jointly) need to do to make things happen?

¹ This scheme was established in 2009 to partner high-performing and poor-performing companies to share knowledge and best practice.

The opportunity to 'make things happen' need not cost very much.

More generally, in times of economic hardship, good communication with staff at all levels is key to maintaining their commitment and morale. 'Cascade' communication, where each Manager conveys messages to his or her direct reports in turn (and presumably seeks their views too, for upward transmission), is all very well but cannot be relied upon. Ideally, all organisations ought as well to have some form of all-staff briefing (or 'Town Hall meeting') where Leaders communicate directly with (and listen to) colleagues at all levels.

This is particularly important where a company is a wholly owned subsidiary of a multinational broadcaster based abroad, and where it can be quite difficult to communicate the parent company's business strategy to staff many thousands of miles from its corporate headquarters. It is equally important that such multinationals do not neglect the more general Learning & Development needs of their remote staff.

Where funds do remain available for direct investment in Learning & Development (for example the purchase of off-job training provision), then it is vital that this investment is coordinated with the overall mission and strategy of the company concerned. Planning of training, rather than letting it happen ad hoc, is important to maximising its effectiveness. If training activity is planned, then companies can negotiate effectively with off-job training providers to ensure that their needs are met at a price they can afford, rather than relying upon – or, more often, turning down – what providers happen to offer them.

Validation, Looking Ahead

From September 2010 onwards the BETR is revising the validation cycle to introduce a rolling programme to target support and guidance for those companies struggling to show year-on-year improvement, especially those still at None or Base provision, as well as liaising with consistently High performers to identify good practice that can be shared with the industry. Validation visits will be conducted throughout the year from 2010 onwards.

The criteria used for the selection of broadcasters will be:

- Broadcasters already engaged in an agreed action plan;
- Broadcasters new to self-evaluation and / or have received a new licence;
- Broadcasters reporting a significant positive or negative change in a number of strands who were not visited in 2008 or 2009;
- Broadcasters who submitted a late self-evaluation form in 2009, and,
- Broadcasters demonstrating interesting or innovative approaches to training and development that could be subjects for future case studies.

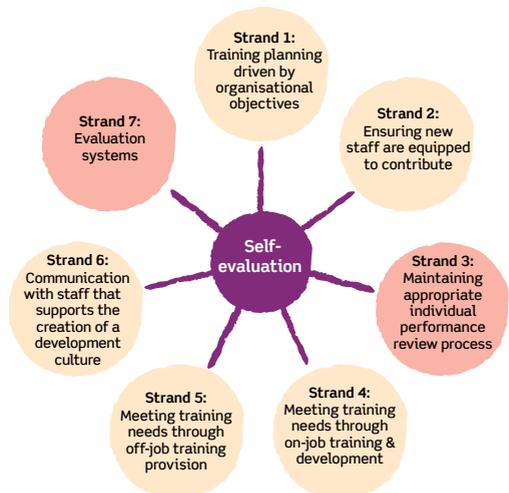
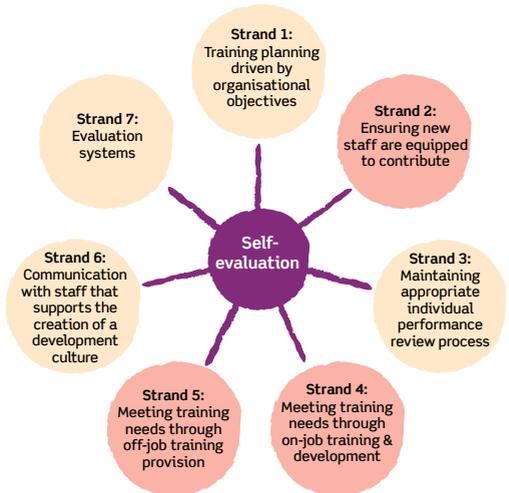
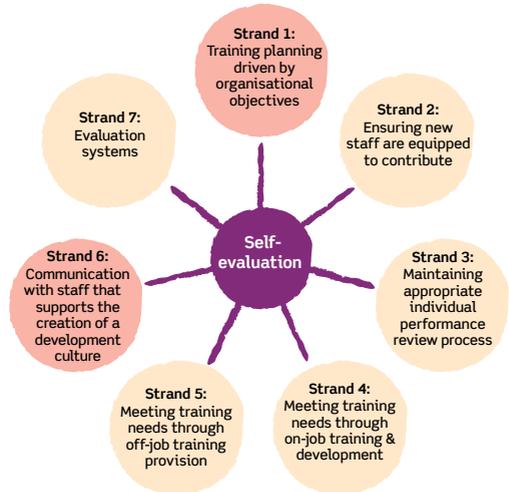
Findings – Interrogating the Data

As with the previous years the self-evaluation and validation process has highlighted many common areas of strong performance across Radio and Terrestrial / Cable broadcasters, but also those areas requiring further development, guidance and support. The broadcasters, although they have ranged in size and scope and with a variety of resources available to them, have all been characterised by employee drive and enthusiasm. The strongest evidence in support of the self-evaluation rating has been where the employees themselves describe their organisation as a deliverer of effective training and development.

For a broader view of company performance, the strands contained in the self evaluation grid can be clustered under the themes of:

- Linking to your Business: Strands 1 and 6;
- Meeting the Training Need: Strands 2, 4 and 5;
- Performance Management: Strands 3 and 7.

The three clusters of strands do highlight some of the particular attributes of different businesses in their ability to engage and embed Learning & Development into their organisations. See Appendix 1.



Quantitative Data

Turnover

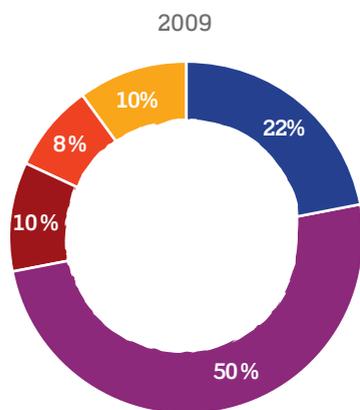
Both the TV and Radio industries are characterised by a small number of large businesses (with a series of mergers in recent years) and a larger number of much smaller organisations. Broadcasters' turnover is not always published in the public domain due to a number of organisations being privately owned, or some broadcasters reluctant to share their turnover. We decided not to formally request this data in the 2009 return.

From published data, we can say with some confidence that, as in previous years, a large proportion of broadcasters are operating at a turnover of less than £50 million per year. This contrasts with the big three: BBC, BskyB and ITV, who are operating at over the £1 billion per year threshold.

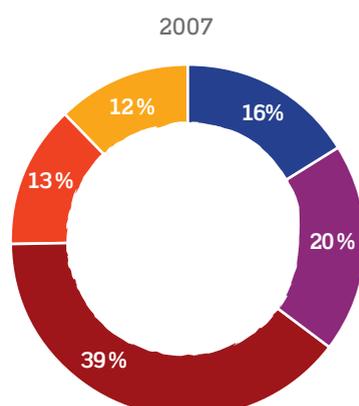
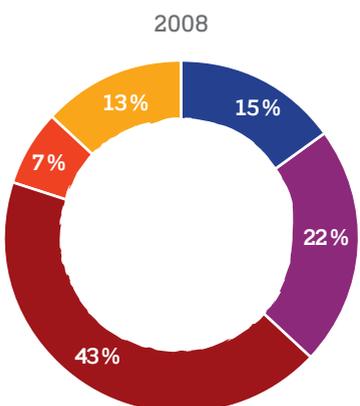
Company Size

In 2009 we rejigged the company size bands slightly to be in line with the government model. This aligns us with the National Training Awards and with other government statistical measures.

The broadcast industry has a few big players, but nearly three-quarters of the regulated companies have fewer than 250 employees (and remember that the very small companies are not reporting). Only 18% fall within the 500+ band with 10% representing seven companies with 1,000 staff or more. This means there has been very little movement in the overall shape of company sizes within the sector between 2008 and 2009.



■ Very Small Companies	21 – 50
■ Small Companies	51 – 250
■ Medium Companies	251 – 500
■ Large Companies	501 – 1000
■ Very Large Companies	1,000 +



Training Budgets

Last year the BETR reported that training budgets were under pressure because of the economic climate, and this trend has continued into 2009. The majority of broadcasters visited in 2009 reported that they had a dedicated training budget. However, several indicated that budgets were under pressure and on a 'needs must' basis. Given the small number of validation visits at the start of 2010, it is not possible to draw any inference of a percentage downturn in funding for training from this group. This suggested drop is consistent with the CIPD report and anecdotal evidence from broadcasters that training budgets, which are often not dedicated, are being cut. The CIPD suggested that overall, over half of the organisations across the whole of their membership (not just broadcast related) that they surveyed early in 2010, reported that their Learning & Development budgets were down, with only one in ten expecting budgets to increase this year. Skillset's Recession to Recovery Report of the Creative Media presented a slightly more optimistic picture. While one in three of the organisations they surveyed had reduced their training budget, a quarter reported actually increasing funds available for training. The BETR continues to be concerned to see training budgets recover and supports the view that those companies that invest in their workforce, particularly in difficult years, are best placed to survive and grow. The UK Commission for Employment and Skills, UKCES, (www.ukces.org.uk) suggests they are four times more likely to succeed.



Overall Performance

Despite the economic conditions the standard of training and development declared in the returns continues to be of a high quality, with a significant number of broadcasters declaring Medium and High levels of provision. This has also been captured in the quality and volume of case studies provided for the BETR to consider in the last four years. Validation visits conducted so far in 2010 and the entries for the National Training Awards have provided additional sources of good practice in the industry.

As in previous years the methodology has been to collate individual grades against each strand of the self-evaluation by the percentage of returns, to give a view of overall strand performance across the industry.

In addition, to give the industry an indication of overall company performance within the self-evaluation model, a simple **rank ordering** scalar value, based on 0,1,2,3 being the numerical attributes for None, Base, Medium and High respectively, was assigned to the grid. Therefore, any company performance will be in the range of 0 (None for all strands) to 21 (High for all strands). This enabled a rank ordering table for all companies for the four years surveyed. From this rating we have developed a benchmarking tool that will go live in the 2010 return round, to give each broadcaster an additional indicator of their performance.

Any one company may have differing strengths and weaknesses across the strands, but this provides an overall rating.

Individual companies can easily work out their own ranking; the BETR will not publish individual data.

For the 2009 returns this data was further subdivided by company size of Small, Medium and Large (although please note the changes in definition of size, as mentioned previously, make direct comparison more difficult).

By this process the following analysis was produced:

- Performance by strand across the industry.
- Performance by all companies, rank ordered as an overall score.
- Performance by company size.

The detailed charts and accompanying data are all available in the Appendices of this report.

For the reporting round for the year to December 2009 the BETR assessed 72 companies, of which 56 were Television and 16 Radio. It has to be noted that considerable effort was put into integrating the databases from Ofcom and the BETR, given the new remit for reporting on Equal Opportunities, the sister report to this one. We also made efforts to ensure that all of the data was correct for these companies. Hence some companies were captured by the new arrangement and others were no longer required to report to us.

Overall there has been a performance improvement across the strands and, as in previous years, we allocated High, Medium and Low performance to companies within the industry, as shown in the table below.

Performance	2009	2008
High	35%	30%
Medium	57%	61%
Low	8%	9%

From these results we have concluded that there has been an uplift in High performance of over 5%, but this has been due to the fact that there are fewer companies in the Medium range. In other words, we are seeing some companies moving from Medium to High, but not being replaced in the Medium range. This in itself is not necessarily a cause for concern, but it does mean that those companies who are still reporting Low performance remain a group unto themselves and are not really engaging with the issues and potential for developing their staff within the UK working environment. As mentioned in an earlier section of this report, the consolidation, churn and mergers and acquisitions within the industry have also meant that we have fewer, yet larger, players in the Radio sector. They have brought with them considerable multinational expertise and capabilities, which has resulted in quite a step change in improvement. This is especially to be seen in the area of evaluation, which has shown a substantial improvement compared to previous years for the Radio sector (and is not replicated to the same extent in TV).

In the next section we analyse each strand in detail; below we set out a few general observations.

It is a matter of concern, especially in these economic times, that companies are still not all truly linking their Learning & Development strategy with that of their overall business objectives. It is hardly surprising that some Business Leaders will still struggle to see the relevance of Learning & Development if they are not tightly bound to the performance of the business. Elsewhere we have mentioned the fact that both government and CIPD Reports indicate that companies that continue to train their staff in times of recession are up to four times more likely to survive in a period of recession.

Similarly, there is a perception that Performance Management's (Strand 3) only true function is to enable Managers to appraise their staff on the basis of performance for potential bonuses or salary

increases. A point stressed by the Validation Team. We would suggest that its value is also to look at the individual's performance needs as a whole. It has been reported in many staff surveys and research reports that whilst salary is clearly a number one priority, number two on the list of needs of an individual is appropriate support and development whilst in their role within the organisation. So we continue to urge that in times of economic constraint where pay may be frozen, one of the things that companies can still do for their staff is to respond to their Learning & Development needs. This doesn't necessarily mean the allocation of a major training budget; companies can be a little more creative in the way they meet those needs by mentoring, coaching and additional on-job training. If a company cannot thank staff by paying them more, at least they could give a little more time and flexibility to develop their capabilities.

This leads us to the overall view that learning has become more ad hoc within many organisations and driven by what many typify as a 'needs must' basis, particularly where defined funding has been removed or in many cases decreased. It is also true that many companies are using fewer external training agencies within the industry and this is mirrored by the CIPD Report showing a reduction in over 30% of use of third-party training companies. Indeed within the broadcast industry several specialist agencies for training provision have recorded that they are struggling to maintain a viable business.

This implies that there is even more responsibility thrown on the Learning & Development people within a company to take on not only the management and organising of Learning & Development, but also a higher degree of delivery and development work. This has suggested to us a greater need for 'Train the Trainer' programmes, as people within the business are being asked to train their colleagues. But we have found there is little appetite for attending formal Continuing Professional Development (CPD) specialist courses for L&D staff, due to the cost

involved and the time away from the business. The approach that was prevalent last year and it would seem remains so, is to rely a great deal on informal mentoring and coaching, which is sometimes rather disparagingly called the 'sitting with Nellie' approach.

There is nothing wrong with informal mentoring, indeed a lot to be said for it, but there are risks. If you do not formally ensure that the individual delivering the training has the capabilities to do it, and, secondly, that there is a decent and formal structure to ensure that the body of knowledge required by the mentee is actually being delivered, it may be ineffective. This still causes us concern. Not the informality, but the fact that we do a disservice to both parties involved in this relationship if the Coach or Trainer has not been supported in their role. There is still much work to do on how we can improve the collective knowledge within the industry and share it. We hope that more people will find out about and support the networking opportunities we have provided, as set out above.

So we will continue to encourage the development of an L&D community in broadcasting and the advantages it will bring to all practitioners.

By Strand across the Industry

Detailed charts can be found in Part II. They indicate the total percentage of broadcasters achieving the various levels of provision across the individual strands of the self-evaluation. The charts show the overall change in provision and also by Television and Radio over the last four years.

A review of the last four years and the analysis and observations for each strand in 2009 are set out in the following section.

Strand 1

Training Planning Driven by Organisational Objectives

This strand considers whether organisations have clear priorities that link the development of people to the aims and objectives of the organisation at organisational, team and individual level.

As previously reported, it is clear that when training planning is linked to organisational objectives it is done well. We will look at this in more detail in our recommendations, but it does seem that companies still need some form of route map to developing this approach in determining first the needs and the capabilities of their staff, followed by the skill development that would be an outcome from that. Something that all L&D people should be aware of is the Training Needs Analysis (TNA). This should be the first step in ensuring that the business has a credible training provision.

Key points are:

- Overall the figures in Strand 1 seem to have remained fairly static between 2008 and 2009. With Radio only one company moved from Base to Medium. The picture in TV is of more churn.
- On the positive side, four companies have moved from Base to Medium and two companies from Medium to High. However, two companies have moved from Medium to Base and one from High to Medium.
- Although overall more companies are scoring High and Medium, the actual number of broadcasters has increased, so the percentages have remained the same.
- Over the past four years overall there has been a continuing upward trend, resulting from a gradual reduction in the percentage of companies scoring None or Base and a corresponding increase in those scoring Medium and High.
- However, this still remains one of the lower scoring strands, which suggests that broadcasters still find it challenging to link training to organisational objectives.

Strand 2

Ensuring New Staff are Equipped to Contribute

This strand explores how organisations promote the development of a performance culture, ensuring staff have access to the skills and knowledge required to perform their roles effectively.

All reporting companies provide some form of induction. However, many are still only providing the most basic of inductions. This is the opportunity for new staff to get to know their colleagues and to understand the processes and working environment for their career with the organisation. It sets the tone for how an individual might expect to be treated within the organisation and should be a rewarding experience for the new joiner. There is no need for it to be a formal training programme or a few days away from the office. Induction could include a whole range of options such as job shadowing, partnering with a Senior Manager or spending a short, but possibly significant, amount of time within other departments with whom the individual would interact or work on a daily basis.

Key points are:

- It is reassuring to see that, again as in 2008, no broadcaster has evaluated at None at this level, meaning that all broadcasters offer some support to new entrants to the company.
- In TV three companies moved from Base to Medium and two companies moved from Medium to High. There was some negative movement, with two companies moving from Medium to Base. Overall though, the changes were positive with a decrease to 14% in those scoring Base and an increase from 27% to 30% in those scoring High.
- In Radio no companies have gone down and one has moved from Base to Medium and one from Medium to High.
- As for 2008, this is the strand with the best overall performance compared with the other strands. Only 13% of broadcasters rate themselves as offering Base provision and 33% evaluate at the highest level.

Strand 3

Maintaining Appropriate Individual Performance Review Process

This strand looks at the arrangements in place to appraise staff performance against the key objectives and targets of the organisation.

Understanding an individual's development need underpins absolutely the training developed and delivered, as well as ensuring that they are capable and able of working to the needs and requirements of the organisation. Ideally it should be more than an annual review. There could be an ongoing mentoring and monitoring process with the individual's Line Manager on at least a monthly basis. This could then be followed by a formal biannual, in addition to a formal annual, review. These are often known as formative and summative assessments. Essentially, this includes a performance review or appraisal system that links individual objectives to those of the organisation, supported by a periodic review process. The appraisal system should typically include an element of self-assessment, interview, documentation of training and review. In a report from UKCES (UK Commission for Employment and Skills) published in March 2010 it is suggested that **under-employment** and the under-utilisation of skills is a significant issue. Without an effective performance review it is not possible to maximise an individual's opportunity for sustainable employment. It is clear that a good process set in place in any organisation would rectify this situation.

Key points are:

- This is an interesting area as it reveals the most uneven levels of change year on year.
- Whilst the number of companies recording Base provision has increased since 2008, the number rating themselves as High in this strand has increased quite considerably.
- Analysing the broadcasters on an individual level, it is interesting to note the increase in provision from Medium to High by five TV companies and four Radio companies. There has been a small amount of movement from Medium to Base, but it is the increase in High provision that stands out in this area.
- Clearly Performance Management has increased in profile for these companies and many have a structured performance review process, the impact of which is measured and evaluated.
- This works particularly well when linked to business performance and salary but as explained above, the benefits are sometimes not so obvious to companies when there are no bonuses to be awarded.

Strand 4

Meeting Training Needs through On-job Training and Development

This strand recognises that training and development in broadcasting will include an element of on-job training.

On-job development includes learning through the experience of doing one's job, reflecting on that experience, discussing it with a Manager, Mentor, Coach, colleagues, receiving feedback on one's performance, reviewing and evaluating one's performance, being coached and supervised. It is a particularly good way of developing technical skills. Meeting training needs through on-job training and development is surprisingly one of the poorer performing strands for all broadcasters. It suggests that there is still a long way to go within broadcasting companies for them to embody the notion of the learning culture as part of the way they work. On-job training relies heavily on individual capabilities and the engagement of the Coach, Mentor, Trainer, Manager. Some form of 'Train the Trainer' programme would at least ensure a consistent starting point.

Key points are:

- When analysed at an individual level, it is worth noting that there has been almost no change in the level of provision evaluated by broadcasters who submitted returns in 2008 and 2009. This is surprising, given the other evidence we have that in times of recession there is more reliance on on-job provision.
- For Radio there is no change at all, and for TV one company moved from Medium to High, but there was a corresponding move by another company from High to Medium.
- As in 2008 it is a Low-performing strand. Overall it is the strand with the smallest percentage of broadcasters scoring High.
- Indeed, if you look at an analysis of change between 2006 and 2009, it shows clearly that this is the strand with the lowest level of improvement.
- It would be interesting to discuss the possible reasons why broadcasters feel unable to evaluate themselves as performing High in this area. Is there a lack of clarity of what High should look like? Or where on-job training is undertaken, do time constraints mean that it is difficult to evaluate and follow up training, hence leading to a lower score. In other words, is this the strand that is the hardest to measure?

Strand 5

Meeting Training Needs through Off-job Training Provision

This strand identifies the opportunities that are made available to staff for off-job training, to ensure whole-job competence is achieved.

Off-job development includes participation in courses or conferences, undertaking a qualification, open or distance learning, secondment, placement, shadowing, exchange visit, study leave, etc. Training needs should be identified through discussion with individual employees. Typically, off-job training has been provided by organisations when support and mentoring through on-job training is not available or not appropriate. Many organisations now rely upon manufacturers to provide skills training in particular products, cameras, editing, mixing desks, etc. Off-job training does not mean off-site. It is essentially training that is away from the place of work or desk; while they are away from their day-to-day job role. There has been a clear downturn in the use of third-party training providers. However, UK's Best Workplaces reports that the average hours of formal training per annum in the UK are 60 (ninth in ranking). The highest provision is in Norway with 98 hours and the lowest in France, with 44.

Key points are:

- There is little change being reported in the performance in Radio in Strand 5, which has remained static between 2007 and 2009 and it is the only strand where Radio scores slightly lower than TV.
- Both TV and Radio have the highest percentage of Broadcasters scoring Medium provision.
- It is encouraging to see provision gradually increasing in this area. After Strand 2 it has the highest percentage of broadcasters scoring Medium and High.

Strand 6

Communication with Staff that Supports the Creation of a Development Culture

This strand considers the range of communication activities undertaken by organisations to provide staff with the knowledge and access to training and development opportunities, promoting self-development and continuous learning.

There has been some performance improvement in Strand 6 over the four years but it is not significant. Organisations with a strong learning culture perform better². This was also dependent on the internal culture of the organisation and the clarity with which the Business Managers have communicated the training and development opportunities to the individual. In the current economic climate this should also be about directing staff to industry or professional resources. Many individuals have a very narrow view of where and what they can source to support their work and personal career.

Key points are:

- In this strand, no Radio or TV broadcaster has downgraded their level of provision between 2008 and 2009. 7% of TV companies have increased their provision from Base to Medium, and the same percentage from Medium to High.
- Similarly, a quarter of Radio companies have shown a similar one-step increase in provision.
- Both TV and Radio each have one broadcaster reporting that they have no provision in this area.
- Over the four years there has been an overall decrease in the number of broadcasters scoring None and Base, and a corresponding increase in the number of those scoring Medium and High.

² See <http://www2.peoplemanagement.co.uk/pm/articles/keep-on-running.htm> and http://www.cipd.co.uk/subjects/lrnanndev/general/_learning_and_development_10.htm

Strand 7

Evaluation Systems

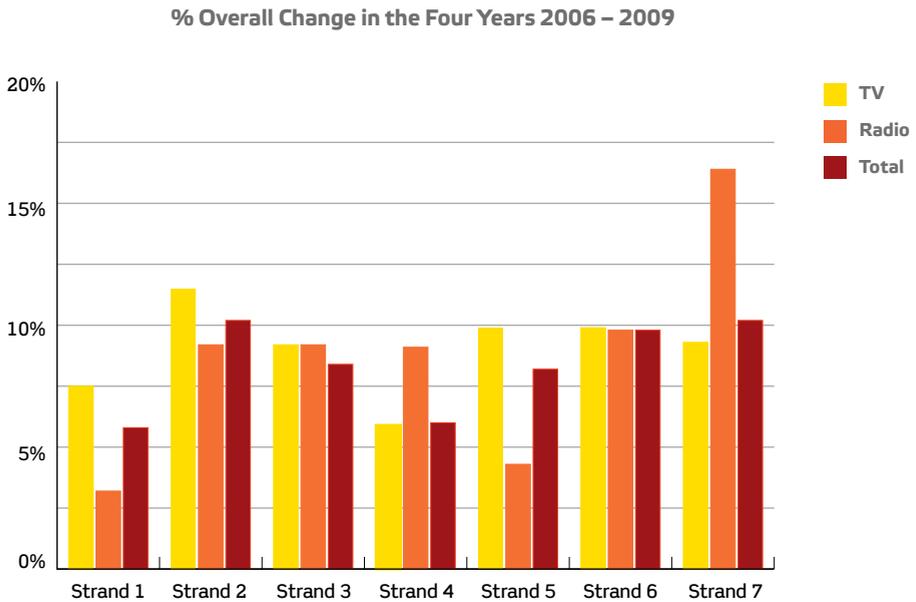
Strand 7 encompasses the overall assessment of training and development for the organisation, the individual and the Trainers.

An effective performance management system will include the measurement of impact upon the individual, team and organisational performance against initial objectives and organisational goals. Although Strand 7 is an element in its own right, it clearly captures and encompasses all the other six strands as part of its framework. A formal process of reviewing and evaluating the Learning & Development within the organisation underpins all aspects of staff development. Although it is structured, it does not imply the use of a Learning Management System or some other form of IT. It is still the only strand where None and Base overall are still greater than Medium or High. Changes are clearly marginal, yet evaluation is so important in ensuring value for money. Some form of Return on Investment methodology enables companies to calculate the return on the organisation's investment in Learning & Development. It need not be onerous, but can validate the contributions to organisational strategy from L&D. (In 2011 the BETR will once again offer some workshops on this topic).

Key points are:

- As in previous years this remains the weakest strand, with the greatest percentage of broadcasters recording no provision.
- However, it is interesting to observe that Radio companies have achieved almost a 17% increase in performance in this strand between 2006 and 2009.
- Although this strand has the largest number of broadcasters recording None and Base provision, it is encouraging to note that 10% of them have moved from Base to Medium.
- Also the percentage at None and Base is gradually reducing over the years, with a corresponding increase in Medium and High provision.
- However, it still remains the only strand where the percentage of None and Base exceeds that of Medium and High, thus illustrating the difficulties broadcasters still encounter with evaluating their training.

The graph below shows the significant improvement in performance across all strands over the last four years, with particular improvements in Strand 2 and for Radio in Strand 7. However, there is still scope for improvement and this will be addressed in the conclusion.



Ranked Ordered Performance

As with previous years we assigned an overall ranking to all companies in the broadcasting industry. We did this by assigning a value of 0 to **None**, 1 to **Base**, 2 to **Medium** and 3 to **High**. So those companies who scored High in all strands scored 21 and in theory a company with no development work in any of the strands or attributes would have returned a total value of 0 overall. This will inform our proposed benchmarking tool to be set up for the 2010 reporting round.

The lowest score in 2009 was 5. This meant that the individual company provided a base provision in five of the seven strands. In 2006 we identified 24% of the broadcasters operating in the High band; in 2009 this is now 35%. Significantly in TV the number of Low-performing companies has dropped from 20% to 9% in 2009. Only five companies are now Low-performing.

In Radio this has gone from 13% to 6% (just one company). The significance of this data is that overall the Medium and High provision is increasing and the Low provision has dramatically dropped. This suggests that, whilst there are some identified overall performance issues in particular strands, overall performance in the industry has significantly improved.

Finally, if we look at performance across each strand between 2006 to 2009, the following can be noted; 53 companies have reached an overall performance rating in 2009 of over 50% across each strand. More significantly the overall improvement even of Strand 7 has been significant. The lowest improvement is Strand 1, with 4%.

The greatest improvement in industry-wide performance has been Strand 2, with over 6% change over the three years. The most significant change has been in Strand 7 for Radio, which has shown an overall performance improvement over the three years of nearly 11%. Given that over 25% of the industry is now in the hands of three major players, it is clear that their rigorous systems have had an overall impact on the capabilities of the Radio broadcasters to manage their learning and training provision, as we noted last year, but which appears to be sustained.



2009 2006

Performance by Company Size

It is gratifying to note that there are good performers across all company sizes.

Trends in Learning & Development 2010

The unprecedentedly challenging economic climate has impacted not only on the ability of companies to find the investment for training, but also on the type of learning delivery. The short-term efforts needed to combat recession may have been foremost in employers' thinking but for the longer term skills needs still need to be addressed to ensure companies are positioned strategically for the future.

Skillset's Recession and Recovery Report – focussed on the Creative Media – corroborated CIPD's big picture of the impact of the economic climate. Their survey showed that 85% of the companies they surveyed were affected by the recession, with smaller companies particularly hit.

The impact on staff was considerable. Skillset's survey suggested that 30% of TV companies were redeploying existing staff, 43% had a recruitment freeze, 44% made staff redundant, with 17% having to retrain existing staff. Just over a quarter reported an increased use of freelancers.

There were still skills gaps, with 40% of respondents reporting difficulty in finding people with the skills their businesses needed. The top three skills gaps across the whole Creative Media workforce were in sales and marketing, production and technology skills, with business management just outside the top three.

This chimed with the CIPD Review, where employers overall were looking for leadership skills, front line people management, and business awareness. Employers were particularly wishing to improve strategic skills and capabilities in managing change.

CIPD also reported on how reduced training budgets were affecting the work of Learning & Development departments. Skillset found that more than half their respondents reported that their ability to provide training was affected.

Of the CIPD membership, about a third reported a reduction in the use of external suppliers and a move to in-house delivery. There was also a marked increase in the use of e-learning, with six in ten organisations now using this.

CIPD still found that the most effective L&D practices were thought to be in-house development programmes and coaching by Line Managers. Major organisational change was also said to be having an impact on learning, with a drive to greater integration between coaching, organisation development and performance management to drive change. Another trend noted was greater responsibility given to Line Managers.

CIPD found coaching takes place in more than 80% of organisations, but only a third have systems to evaluate it. It will be interesting to see whether employers return to commissioning outside suppliers, and focus more on off-job training when economic recovery is more secure.

Conclusions and Recommendations

Overall Conclusions

Staff development should be timely and fit for purpose. It is not the role of the BETR to look at means, but outcomes. In an organisation with a fully integrated learning culture any individual should receive and be offered a blend of learning opportunities that are appropriate and fit for purpose and provide a mix between support through coaching and mentoring, as well as more formal events externally with a formal training programme. Those interventions should have some measurable outcomes and the four levels of Kirkpatrick's³ evaluation model essentially measure:

1. Reaction of student – what they thought and felt about the training.
2. Learning – the resulting increase in knowledge or capability.
3. Behaviour – extent of behaviour and capability improvement and implementation / application.
4. Results – the effects on the business or environment resulting from the trainee's performance.

These measures are recommended for full and meaningful evaluation of learning in organisations and a learning organisation. Their application broadly increases in complexity, and usually cost, through the levels from level 1–4.

The self-evaluation returns indicate an upward trend across the industry and the validation visits reveal many areas of good practice.

Analysis indicates that:

- There is an overall year-on-year trend of measurable improvement;
- Low performance has dropped from 18% in 2006 to 8% in 2009;
- 35% of companies are considered High performers;
- The transition from Base to Medium is about systems and capabilities of the L&D Team;
- The transition from Medium to High is dependent on company resources and constraints;
- A few companies are still at a Base level in aspects of the grid that are about good process and not about learning design and delivery.

Challenges for Broadcasters

It is clear that there is a real challenge to meet the needs of future skills required by the industry, particularly for multi-platform delivery and to cope with rapid technological change and digitalisation. Broadcasters have still to improve performance and evaluation processes. This will ensure that Learning & Development is clearly linked to their business.

Broadcasters should focus on:

- Linking Learning & Development to overall business objectives, a basic building block of successful and efficient provision.
- Supporting existing staff into a new role or when returning after a period away.
- Their performance review processes.
- The provision of on-job training.
- Improving their communication with staff, especially regarding non-company resources.
- Evaluating training and development activity.

³ The most well-known and used model for measuring the effectiveness of training programs was developed by Donald Kirkpatrick in the late 1950s. It has since been adapted and modified by a number of writers, however, the basic structure has well stood the test of time. The basic structure of Kirkpatrick's four-level model is shown here: www.businessperform.com/workplace-training/evaluating_training_effectiven.html

Challenges and Actions for the BETR

The BETR Priorities for 2010 – 11

These include:

- To develop the benchmarking tool.
- To continue improving communications with L&D Professionals through Web 2.0 tools.
- Focus on on-job training in workshops.
- Where possible dovetail with our work on Equal Opportunities.
- Help broadcasters with the actions they could take to move from one level up to another.
- Enhance and develop the validation process as a rolling programme.
- To provide more support for the L&D Manager (whether role or function).
- To help companies make the step change from None and Base to Medium and High.
- To continue to improve and revise the self-evaluation form and user support.
- To enhance (possibly rename) the online Self-evaluation Guidebook with more links to resources and guidance on strand progression.
- To make additions to the Case Study Portfolio.
- To build on the success of the 2009 Learning & Development Conference with online events and workshops.
- To share best practice as highlighted in the Case Study Portfolio and demonstrated through the Broadcast Training Award Winners.
- To help stimulate a network of Learning & Development Professionals across the Broadcast Industry through the LinkedIn network and other Web 2.0 networking tools.
- To focus attention on broadcasters who remain at Base provision with follow-up visits and offers of consulting support.
- To work with independent professional development organisations to develop additional industry-wide HR systems that will support the smaller broadcast company.

The Next Steps in Co-regulation

Looking to the future, the BETR intends to meet these challenges and to encourage greater use of web-based tools and techniques. We have an ambitious plan to make the people development in broadcasting website (www.pdib.co.uk) the prime resource for the L&D Professional in broadcasting. After four years of a full co-regulatory model the BETR Board will be conducting a thorough review of the co-regulatory framework and, later in 2010, will present to the industry and Ofcom any significant revisions to the existing structures and systems.

Broadcast Companies Completing a Self-evaluation Form 2009

No.	Broadcaster	Sector
1	Absolute Radio Ltd	Radio
2	Bauer Radio	Radio
3	CN Radio (CN Group Ltd)	Radio
4	Global Radio UK Ltd	Radio
5	GMG Radio Holdings	Radio
6	KM Radio Ltd	Radio
7	Lincs FM Group	Radio
8	Litt Corporation Ltd	Radio
9	Northern Media Group	Radio
10	Premier Christian Radio	Radio
11	Tindle Radio Ltd	Radio
12	Town & Country Broadcasting Ltd	Radio
13	UKRD	Radio
14	United Christian Broadcasters	Radio
15	UTV Media (GB)	Radio
16	WRN Ltd	Radio
17	AETN UK Ltd	Television / Cable
18	Al Jazeera International Ltd	Television / Cable
19	Arqiva Ltd	Television / Cable
20	Asia TV Ltd	Television / Cable
21	AXN Europe Ltd	Television / Cable
22	Bang Channels Ltd	Television / Cable
23	BBC	Television / Cable
24	Bloomberg LP	Television / Cable
25	British Sky Broadcasting Ltd	Television / Cable
26	Chalina Services Ltd	Television / Cable
27	Channel 4 (Terrestrial and the 4 group)	Television / Cable
28	Channel 5 Broadcasting Ltd (Terrestrial)	Television / Cable
29	Channel M Television Ltd	Television / Cable
30	CNBC Europe	Television / Cable
31	Comedy Central (were Paramount Comedy)	Television / Cable
32	CSC Media Group: (Chart Show Channels Ltd)	Television / Cable
33	Directgov	Television / Cable
34	Discovery Communications Europe	Television / Cable
35	E Entertainment UK Ltd	Television / Cable
36	ESPN Classic Sport Ltd	Television / Cable
37	Fox International Channels	Television / Cable
38	Freesat	Television / Cable
39	Gems TV Ltd (inc. UK Direct Shopping TV Ltd)	Television / Cable

40	GMTV Ltd	Television / Cable
41	Ideal Shopping Direct plc	Television / Cable
42	Islam Channel Ltd	Television / Cable
43	ITV plc	Television / Cable
44	JML Direct	Television / Cable
45	Manchester United Television Ltd (MUTV)	Television / Cable
46	MTV Networks International (MTV Networks Europe) 35 licences	Television / Cable
47	NBC Universal / Global Networks (including Sci-Fi & Sparrowhawk)	Television / Cable
48	Netplay TV Services Ltd	Television / Cable
49	New Delhi Television Ltd	Television / Cable
50	Nickelodeon UK	Television / Cable
51	On Demand Management	Television / Cable
52	Phoenix Chinese News and Entertainment Ltd	Television / Cable
53	Playboy TV UK / Benelux Ltd	Television / Cable
54	Portland Media Group Ltd (Including RHF Productions Ltd)	Television / Cable
55	QVC	Television / Cable
56	S4C (Terrestrial and S4C group)	Television / Cable
57	Satellite Information Services Ltd (Sis.TV)	Television / Cable
58	SBS Broadcasting Network Ltd	Television / Cable
59	Sit-up Ltd	Television / Cable
60	stv	Television / Cable
61	Teachers TV	Television / Cable
62	The Chinese Channel Ltd	Television / Cable
63	The Jewellery Channel (ex Simply Media)	Television / Cable
64	The Liverpool Football Club & Athletic Grounds Ltd	Television / Cable
65	Turner Broadcasting System Ltd (Turner Ent Networks Int Ltd, Cartoon Network, TCM Online, Europe CNN)	Television / Cable
66	UKTV (New Ventures Ltd)	Television / Cable
67	UTV Television (Terrestrial)	Television / Cable
68	Viasat Broadcasting UK Limited	Television / Cable
69	Virgin Media Television	Television / Cable
70	VOOM HD Holdings LLC	Television / Cable
71	Walt Disney Company Ltd	Television / Cable
72	Zone Media Limited	Television / Cable

The Self-evaluation Grid

SELF-EVALUATION OF TRAINING & DEVELOPMENT	No Provision	Base Provision
1. Training Planning Driven by Organisational Objectives	We do not have a training and development plan. There is no formal process by which we link our training and development activity to individual or organisational goals.	We consult informally with staff to identify and plan the training and development activities that will help them achieve their individual goals.
2. Ensuring New Staff are Equipped to Contribute	We do not provide any form of induction training.	We have an informal approach to induction.
3. Maintaining Appropriate Individual Performance Review Process	We do not conduct individual performance reviews.	We conduct individual performance reviews informally on an ad hoc basis to identify training and development needs. Training activity may follow.
4. Meeting Training Needs through On-job Training and Development	Staff do not participate in training and development activities on-job.	On-job training and development is conducted informally to equip people to perform in their current role. We do not evaluate on-job training and development.
5. Meeting Training Needs through Off-job Training Provision	We do not release our staff from their day-to-day role to attend in-house or external off-job training.	We provide access to some off-job training to address specific skills. We do not evaluate its effectiveness.
6. Communication with Staff that Supports the Creation of a Development Culture	We do not communicate with staff about training and development. Staff are not aware if training and development is available. There is nowhere for staff to access information on training and development opportunities.	Staff receive information about training opportunities on an ad hoc and informal basis.
7. Evaluation Systems	We do not evaluate the impact of training and development on individual or organisational performance.	We undertake some informal evaluation of the impact of training and development on individual performance.

Medium Provision	High Provision
<p>We identify training and development needs and plan activity in line with the needs of the whole business or individual departments, at regular intervals.</p>	<p>We create business and training and development plans, ensuring that they are interlinked. Business progress and training and development support are reviewed at regular intervals and plans are updated accordingly.</p> <p>Appropriate resources are allocated for training and development in all areas.</p>
<p>All staff are offered timely induction specific to their needs to ensure they understand the company, their contribution to the company's success and their contribution to / fit within the industry.</p>	<p>Every new member of staff participates in a timely, structured induction programme, which gives them a clear understanding of the company, their contribution to the company's success and their contribution to / fit within the industry. Evaluation is through new joiner feedback, performance and short-term turnover. Appropriate induction is arranged for staff who change jobs within the company.</p>
<p>We conduct regular individual performance reviews that identify training and development needs, take action to meet identified needs and confirm its effectiveness with the individual.</p>	<p>We conduct regular individual performance reviews, encouraging at least biannual reviews that identify training and development needs. We take appropriate action to make sure needs are met and measure the impact of the action on individual and business performance.</p>
<p>Structured on-job training and development is conducted to equip people to perform in their current role. We offer opportunities to develop the skills required to meet future business needs and / or roles.</p> <p>Training is evaluated against expected personal outcomes jointly by the individual and their Manager.</p>	<p>There is a range of structured opportunities for on-job training to equip people to perform in their current roles. We offer opportunities to develop the skills required to meet future business needs and / or roles. Training is evaluated against expected personal outcomes jointly by the individual and their Manager. The impact of training and development on staff turnover, skills needs and overall business performance is measured regularly.</p>
<p>We ensure staff gain access to necessary off-job training. We require feedback on content and delivery of all off-job training.</p>	<p>We are committed to ensuring that each member of staff has access to relevant off-job training and development opportunities. Staff members and Managers agree and feed back on the impact and value to the business of the development received.</p>
<p>Staff understand the competencies required to perform their roles effectively, and know about the interventions available to help them develop those competencies within and beyond the organisation.</p>	<p>Training and development opportunities are available to all and we communicate these to staff. Leaders promote training and development in our organisation and are active in communicating opportunities that are available to all.</p>
<p>We evaluate training and development activities using a structured evaluation methodology to determine whether people's knowledge, skills and performance have improved.</p>	<p>We evaluate training and development activities at individual level, and at regular intervals review the impact they have on business performance, adjusting our plans for future training and development accordingly. We use a structured evaluation methodology.</p>

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