



EUROPEAN UNION  
European Social Fund

# EVALUATION REPORT



## Evaluation Report

### Lancashire Learning and Skills Council

### ESF Objective 3 Co-Financed Project

Project Title: Retail Training network

Project Reference Number: ESF/0203/091

Lead Organisation: Lancashire College Consortium  
Skelmersdale College  
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## 1. Executive Summary

### 1.1. Report Context

This report forms an end of project evaluation of the ESF funded Retail Training Network project. It aims to evaluate the performance of the project over its lifetime. The report is structured against the following headings:-

- Executive Summary
- Project Context and Objectives
- Methodology
- Project Results (qualitative and quantitative data)
- Prospects

The evaluation framework adheres to LSC evaluation guidance notes published last year and includes the minimum requirements. Separate appendices are also attached which include: project evaluation indicators, structured questionnaires (interim and final) and case studies. Good practice guides published by ICOM and the ESF national website have been referenced to develop the report.

### 1.2 Economic Context

1. This sector employs 200,000+ in the North West and DfEE Skillbase Regional Results NW forecast growth of 24,000 by 2010. The Distribution NTO Workforce Development Plan showed
  - a) Key drivers of change in the Retail sector are: incomes and consumer confidence, e-commerce, IT developments, regulatory changes, intense price competition and the growing importance of customer service.
  - b) The sector has an above-average share of female and part-time workers and employment growth is expected to be concentrated in these areas. On average, the workforce in the Distributive Industry is not highly qualified. Almost one fifth of the workforce holds no qualifications, while 12 per cent have NVQ Level 1 as their highest qualification. High staff turnover can act as a disincentive for staff training.
  - c) About a quarter of respondents reported skills gaps in Retail - these have resulted in:
    - Problems meeting customer service objectives
    - Difficulties in meeting the required quality standards
    - Difficulties in introducing new working practices
  - d) Key workforce development needs are:
    - High-quality management
    - Good-quality customer service skills
    - ICT skills to meet the demands of e-commerce

Challenges in meeting these needs include:

- Addressing the flexible training needs of women and part time workers
- Reducing the high turnover
- Counteracting the image of the sector as low-pay/low-skill, with limited career opportunities

### 1.3 Evaluation Approach

The approach taken in order to develop the end of project evaluation utilises both qualitative and quantitative data. It was formulated by building on the project's output data and softer information derived from interviews with college representatives on the project. The process of project delivery is examined as well as its achievement of targets. Section 3 describes the project's methodology and evaluation processes.

### 1.4 Conclusions

The following conclusions can be drawn from the evaluation processes:-

- Preston College has tried several different approaches to engaged SMEs in the network.
- Specially designed TNAs for the retail sector were developed to ensure any provision to be developed was tailored to business need and their skills issues
- Priority was placed on offering bespoke support for SMEs with training and developments especially designed for the sector.
- Barriers still exist when trying to encourage SMEs to engage in any sort of training and development even when it is free. Often they can see the benefits of up-skilling their workforces, but continue to be reluctant to pay or release them for training

## **2. Project Context and Objectives**

### OBJECTIVES

The objectives were:

1. To strengthen the capacity of the college (Preston College) to develop new provision for the sector, taking special note of the impact of ICT, the requirement for customer care skills, and to take account of basic and ESOL needs in the sector. The LCC will co-ordinate work on this and will:
  - a) by **January 2003** produce a progression map and outline sources of learning support/supplementary learning
  - b) by November 2003 produce a guide to good practice in widening participation in workplace learning in the sector which will draw on case studies from the pilot work.
2. To bring together an employer/college/trade union learning network for the sector. An initial meeting of a steering group will be held in October 2002; by December 2003 20 employers / 3 trade unions will have committed themselves to membership of this.
3. To organise, with employers, workforce learning programmes. Whilst these will be customised to particular needs, they will all:
  - Work with individual employers to identify training needs against business needs and trends.
  - Identify and provide training/support for mentors from the workforce.

- Deliver training to individual employees, identifying their needs and structuring a programme to meet these.

The offering included APL, support with basic skills/ESL if this was required and accreditation either to NVQs, credits towards NVQs or other sector-recognised awards.

(This programme included workplace delivery, use of local and college-based support and assessment centres.)

- Build, through the programme, employer collaboration and collaboration between the partners which will support a sustainable training solution for the sector.

(The programme was expected to run over the period September 2002/November/December 2003. While recognising the need for flexibility in working with the target group, including in timescale, we would expect, with any individual, the programme to be completed within 12 months at the longest and will not recruit after Sept 2003 to ensure completion with the timescale).

**65** individuals will participate over this period.

4. To review 'learning points' and support the mainstreaming of the practice developed.

This will be reviewed with partners at meetings in June 2003, and November 2003, a final report will be produced and a dissemination programme organised.

#### Cross Cutting Themes

1. Equal opportunities was be given a high priority in this project, both those that are generic and issues specific to the sector.

A number of trainees were low-paid, and will have to 'juggle' training, work and family/domiciliary commitments. The project will therefore offer flexible programmes including where practicable ICT links to provide local access to learning packages and support.

During the induction programme any basic learning needs in: Communications; Numeracy; ESL will be identified and an individual action plan agreed. The project particularly targets people who have no recent experience of formal training and confidence-building training will be available to encourage their participation.

Specific support will be made available in the project to support people with family responsibilities, and people who have problems in travel to training, through making training available locally and through arranging childcare support where required. As shown in 4.5(iii) we also take special measures to make sure people with disabilities and with ESOL needs can participate.

The project will support increased participation (and VQ achievement/accreditation) in learning by equal opportunity priority groups highlighted in the RDP and particularly women, ethnic minorities and those with disabilities. The impact on these groups, and on people with basic skills needs will be

- To increase their participation in learning
- To enable them to gain awards

- To help develop their employability and avoid risk of job loss/lengthy unemployment if they do lose their jobs, and progression to higher level jobs.

This project will enable enterprises to gain business/competitive advantage through identifying the IT user skills they need to meet business improvement goals, and through supporting the delivery of flexible programmes to meet these needs. Project objectives include:

- To organise reviews, via workshops/use of analysis and one-to-one reviews, to identify the ICT skills enterprises needed to meet business improvement goals.
- To set up and deliver training programmes to meet these needs.
- To complement the work with enterprises by creating materials to support workshops/reviews and through extending the range of specialist user training available to SMEs.
- To share the results of the work, including an evaluation study, with partners and other key players, identifying lessons for mainstreaming at a seminar to be held in December 2003.

Project activities included:

#### **Stage 1**

This stage involved workshops and/or one to one sessions coupled with TNA processes to identify skills issues in the workplace. For micro businesses skills analysis activities were conducted on a one-to-one basis with the owner-manager rather than via a workshop or formal TNA process.

#### **Stage 2**

Having established need and identified best practice in achieving the task/objectives set, the project reviewed the resource required to deliver training and the extent to which it was already 'held' by partner colleges, or Learndirect. The training was then set up and delivered using a combination of workplace and learning centre delivery, using online support backed up with live reviews with tutors/mentors where required.

### **3. Methodology**

The purpose of this evaluation report is twofold, firstly to satisfy LSC requirements and secondly to assist FE colleges and partner organisations to align current and future projects more closely with the changing needs of its target audiences. The following evaluation objectives were established and informed our evaluation methods and processes:-

- Document project's experiences and achievements for internal and external audiences
- Create a platform for future development
- Support dissemination activities

The following evaluation methods were adopted to analyse and present findings:-

- **Formative evaluation:** - producing interim evaluation findings as the basis for adjusting and improving activities as the project progressed.
- **Summative evaluation:** – producing final reports to draw lessons learnt from the project after results were captured and recorded.

Types of evaluation approaches adopted included:

- **process evaluation** – evaluating the design of the project to review if the provision was appropriate to the client group and to establish if College plans were appropriate to meeting project objectives
- **outcome evaluation** – reviewed results, progression routes and positive outcomes

#### Structured Feedback

College representatives working on the project discussed the project activity at team meetings to gather qualitative data.

#### Evaluation Indicators

The project was set a range of evaluation indicators to assess the success or failure of any particular aspects of the project. Quantitative and qualitative indicators were developed and formed part of a simple matrix of indicators (see Appendix 1).

#### Project Monitoring Procedures

During the operational life of this project the Consortium established a comprehensive process of reporting to ensure effective and timely delivery of project activities and to address any delivery difficulties.

Management information was captured and recorded on a monthly basis centrally and quantitative data has been compiled from our management information returns to the LSC and included in this evaluation report (see Project Results Section 4.2).

In addition regular evaluation review meetings were scheduled to review progress against the evaluation indicators and objectives. Project implementation group meetings and steering group meetings were also used as a vehicle to review evaluation activities, discuss key findings and raise any concerns or issues regarding the evaluation processes.

Feedback from participants has also been included in this evaluation report by analysing and interpreting comments contained on FE Exit Questionnaires.

#### 4. **Project Results**

##### 4.1. **Delivery Mechanisms**

###### Recruitment and selection processes

The project team at the College worked with local retail SMEs and USDAW representatives to identify employees that required support in increasing and/or updating their skills. All participants completed a beneficiary eligibility form and businesses were assessed to ensure that they were eligible for support (e.g. employed less than 250 people and met State Aid rules and regulations).

In addition the College utilised existing company databases and extensive networking arrangements to “tap into” potential businesses located in the target area including: Business Links, Chambers of Commerce and Trade Union Representatives.

###### Matching Need to Provision

Participants were provided with an induction session to establish current knowledge and to provide them with the opportunity to discuss their training needs. Skills assessments formed part of a TNA process with the SME in order to match business needs with individual needs of employees participating on the project. Course provision was then developed and advertised at a time and place to suit participants.

###### Project Adaptability

Although all participants were encouraged to develop an Individual Action Plan setting career and personal goals and aspirations and additional support required as most sessions attended were very short in duration most felt it was unnecessary.

Project activities were delivered on a roll on roll off basis in locations and venues at times to suit participants’ personal circumstances (e.g. work and family commitments) and where possible SMEs offered the College access to their own facilities to reduce staff downtime and minimise disruption. The College delivered the courses in the specially design CoVE retail training suite.

###### Publicity and Promotion

Preston College used their company databases to mailshot to potential retail SMEs that would benefit from the project. Business Links’ learning websites (e.g. Lifetime Training and Link for Learning) were used to stimulate demand and raise awareness of the project. The SME liason officer also undertook cold calling.

All publicity materials declared that ESF and LSC funding supported the project.

## Innovation

The nature of innovation is the delivery mechanisms of the project rather than the provision. For example, SMEs were able to select the most appropriate provision, closely match to business need as part of a TNA process and offer their employees access to provision on their premises to reduce staff downtime and minimise disruption in the workplace.

In addition Preston College was able to deliver when necessary, project activities in the specially designed retail training suite.

### 4.2. Project Outputs and Outcomes

<b>Revised</b>	<b>Definition</b>	<b>Target</b>	<b>Actual</b>
<b>Outputs</b>	No of companies helped	20	14
	No of employees helped	24	14
	No. of female employees helped	7	4
	No working towards a qualification	23	0
<b>Outcomes</b>	No of leavers gaining a qualification	20	0
	No of jobs safeguarded by ESF support	10	0
<b>Milestones</b>	Progression map	1	1
	Network Steering Group	1	1
	Good practice Guide	1	1
	Evaluation report	1	1

### 5. Prospects

#### Areas of Good Practice

The development of bespoke training sessions with learning materials to support participants whilst they are attending class. Feedback from taught sessions have been extremely valuable.

Preston College has also been fairly successful in introducing a specially designed Retail TNA. This has enabled us to design provision to suit business needs and address skill deficiencies in the workplace.

A very good, effective and positive working relationship has been established the retail union USDAW and further training development are planned in partnership with them.

## Lessons Learnt

The project was perceived to be a good opportunity to develop strong and positive working relationships with city centre retailers. Preston College over the period of the project was developing a CoVE in retail and this project would enable retail SMEs to participate and realise the benefits of lifelong learning to the success of their business. However retail SME's did not particularly want to become engaged whatever methods were tried.

Problems were encountered with compilation of management information for LSC returns and Preston College records and databases had to be adjusted to take account of the additional management information requirements. In addition tutors initially struggled to realise the relevance of completing additional paperwork and the linkages to LSC starts and outcome payments. Steps were taken to raise their understanding of payment processes and ESF requirements.

The SME eligibility form and state aid rule requirements were difficult to implement, primarily because SMEs were not always entirely sure of what they were declaring and had difficulty in interpreting the information on the form (e.g. euro exchange rates not provided). In addition a revised form was issued via the LSC late on which required Colleges to go back to companies and obtain signatures. This proved to be a labour intensive and a difficult exercise that was in danger of becoming burdensome for participating SMEs. Steps will be taken to ensure that future SME proformas are agreed centrally with the Consortium and the LSC prior to circulation.

Whilst access to the provision was flexible, Preston College recognised that it would be useful to offer breakfast and lunch-time taught sessions to reduce staff downtime and minimise disruption in the workplace. These sessions would also prove to be beneficial should participants struggle to be released from their core working hours.

This is a short-term project, which does not meet the long-term needs of local businesses. Building relationships with businesses takes time and resources with results often not being seen in Year 1. Project duration should be considered if similar provision is delivered in 2004 and onwards.

## Added Value

Retail SMEs have benefited from gaining access to tailor made training delivered on work premises or in a city centre location. All training and development activities were structured around their skills needs with clear linkages to their organisation's business plan objectives.

Participants also gained from participating on the project, acquiring valuable transferable skills that increase the employability, securing their employment in the workplace and ultimately increasing productivity levels.

TNA activities also offered more flexible bespoke provision linked to business needs and enabled the project team to identify additional skills issues in the workplace that will allow Colleges to offer additional customised support.

### Mainstreaming

Unfortunately barriers still exist when trying to encourage Retail SMEs to participate in anything even if it's free, which this project offered. The retail CoVE will be informed of the project activities and evaluation to help and support further activities with the sector.

Preston Colleges is however keen to mainstream TNA processes into core provision and any future activities.

### Dissemination

All dissemination materials produced for this project were shared with members of the Consortium and the wider partnership. A dissemination event was arranged in January post completion to raise the profile of the project, share best practice, lessons learnt and discuss the project's heritage.

Key partner organisations were invited to attend including representatives from Business Links, Ufi Hub and the Learning and Skills Council. Copies of the materials produced for the event are attached as separate Appendices.

## Appendix 1 – Evaluation Indicators

<b>Activity</b>	<b>Quantitative Indicator</b>	<b>Target</b>	<b>Qualitative Indicator</b>	<b>Information Gathering</b>	<b>Responsible Person</b>
Target Group	No of trainees	20	Type of trainees as per bid document (employees of SMEs)	Beneficiary starter form/company eligibility form	Providers/LCC
Impact and Outcomes	No. completing course	20	Perceived quality and relevance of provision to target group	Attendance at project implementation group mtgs Beneficiary leaver form (e.g. satisfaction levels/progression routes)	LCC/DS Providers/LCC
<b><u>Nature of Provision</u></b> TNA Process Training Provision Development of learning materials	Production of training plans and delivery of customised support	20 SMEs	Reduction of company skills gap Beneficiary satisfaction levels Perceived quality and usability	Skills audit/review (feedback) Beneficiary leaver form Action plans	Providers/LCC Employers  Providers/LCC/
Outputs	Number of trainees gaining a qualification	20		Certificates	Providers/LCC
Publicity and Promotion Activities	Conference to disseminate findings and share best practice	1		Event Feedback sheets	LCC