

Evaluation Report

Project Title: Advance your Career with Confidence

Project Reference: Number ESF/0203/240

Lead Organisation: Connexions Lancashire Advance Adult Services

1. Background

The Evaluation Report was compiled by Mark Willett Adult Services Manager from Connexions Lancashire. The following evidence was used,

- Each team member completed an individual evaluation report
- The now! Team provided an evaluation report on Marketing and ICT/MI
- Appendix 3
- Original Proposal
- Management Information from IAG Manager.

The final MI was produced on Friday 23 January. The report was written 24-31 January 2004.

2. Overview of the project activity and partner involvement and an outline the roles the services partners undertook

The project was delivered by Ad>vance Adult Services the Adult Service Team of Connexions Lancashire Ltd.

The aim of the project was to ***“increase participation in learning and work by providing a comprehensive package of specialist vocational guidance to 720 adults aged 20 and over residing in Lancashire. Ad>vance will use professional trained Advisers who will offer a range of services, which will help adults make positive and informed choices by supporting them to plan for the future. The benefit from participating in learning and work will also be vigorously promoted to the target group, stressing in particular the importance of learning and how it can enrich and improve their quality of life.”*** Project Proposal 2002

The key strategic objectives were to

- Provide advice and guidance and support to enable people to develop active and continuous job search strategies
- Actively promote the benefits of participating in lifelong learning
- Increase sustainable job outcomes

Also the project was aimed at contributing towards achievement of LSC priorities

- Improve the availability of initial information, advice and guidance and maintain support to keep people in learning and increase opportunities to progress into further learning and employment
- Increase the number of unemployed adults accessing information, advice and guidance.
- Improve the coherence of ICT based information, advice and guidance systems.

Connexions External Funding and Contracts Team provided the initial ICT/MI/claim support. Then from August 2004 now! Network through the IAG Manager provided the MI support and the Ad>vance Team Administrator took over responsibility for contract monitoring and contract compliance.

3. Achievements of the project, including achievement against outputs, outcomes and key milestones

3.1 LSC Appendix 3

A final copy of the Appendix 3 is included as Appendix 1 in the report attachments.

3.2. Outputs

A total of 720 (OP1/OP5) adults registered for the project and all beneficiaries received an action plan.

The project exceeded the target by 21% for the number of females (OP2) registered on the project. This was due to successful targeting and referrals from a range of organisations working with females. The team also delivered on site guidance work in women's centres and Sure Start projects.

The project exceeded the targets for 18-25s (OP5) accessing the project. During the lifetime of the project the Advance increased its targeting of 20-24 who have been out of work for less than 6 months to within 12% of the target figure.

The total number of 25+ (OP6) was well in excess of the target figure but as outlined in reports to the LSC during the year Job Centre Plus our main referring agency are providing basic advice services through their own NVQ3 Advisers but are using Advance for the harder to help and long term unemployed. In particular labour market returners who are often been out of work for more than 12 months again are often referred to Advance for specialist guidance. Future Project targets i.e. Advice and Guidance Pays will need to take in account these observations and additional networking/partnership working would be required to increase referral of 25+ under 12 months.

3.3. Outcomes

The following outcomes were not benchmarked with previous projects. The Appendix 1 compared the contract targets with the original proposals.

The outcomes did not have a Referrals to work. This has been passed back to LSC for inclusion in future projects so a comparison can be made on referrals to placing into work.

The most popular referral was FE providers followed by voluntary and community providers, Job Centre Plus (for beneficiaries who had not registered for work and benefits) and HE providers. Interesting observation, that the project delivered better than against the original proposals as

It is difficult to draw conclusions from the “into “ categories as it became clear during the project that because the project had limited lifetime –12 months many beneficiaries would entering after the close of the project eg a beneficiary seen in October who has been referred to HE may not have a place confirmed until the following year, similar with full time education. Also “into” destinations are linked to response from the follow up to December 37% of beneficiaries had replied but its is clear that if the project had had a longer life span higher ratios of “into” would be recorded.

Despite this the project team were pleased with the take up into employment and of those returning follow up questionnaires or responding to phone calls (see Evaluation from beneficiaries the feedback and destinations data is impressive. See Appendix X

3.4. Short Record/Initial registration Data from IAG partner

The following charts and data have been taken from the Short Event record and initial registration data.

3.4.1. Gender

Appendix 2 - 54% female 46% male 5

3.4.2. Qualifications

Appendix 3 – qualification levels of beneficiaries at the outset of project

3.4.3. Ethnicity

Appendix 4 The project attracted 14% of beneficiaries from Black and Ethnic Minorities, which reflects Lancashire-Area Wide cultures, and communities that were targeted by the project.

3.4.4. Disability

Appendix 5 The project attracted 8% beneficiaries with disability.

3.4.5. Destination/Employment Status

Appendix 6 provides a graphical analysis of closure destination data. And if compared with Appendix 7 Employment Status Unemployed was 518 by December it had fallen to 391. This is 24.5% fall, which is quite an achievement with a short-term project. Further demonstration that guidance not only has a social impact on adults but also makes a significant impact in terms of the local economy.

3.4.5. Location

Appendix 8 provides chart of the main postal locations that beneficiaries came from. The project attracted beneficiaries Lancashire wide with work centred on Blackburn, Blackpool (non SRB), Burnley, Chorley, Darwen, Nelson, Preston and Rawtenstall. Also the project attracted beneficiaries' rural communities through its Clitheroe Centre.

3.4.6. General

During the year Advance expanded its service delivery into a wider range of community locations including Surestart, Family Centres, Women Centres, sessions at Job Centres – Skelmersdale, Burnley, Blackburn, Preston, Blackpool and Fleetwood. Attended range of high profile exhibitions/networking events to promote project eg Preston Mela - Avenham Park, PLTP Outdoor Market, Shopping Centres Lancaster, Morecambe, Rawtenstall, Blackpool and PLPT, improved access to adult guidance facilities at Burnley, Skelmersdale and Blackpool. Links with Clitheroe Job Centre Plus led to referrals from residents of the Ribble Valley. Finally the Team received high level beneficiary satisfaction from Matrix Evaluation Survey and Follow up questionnaires.

The company achieved the Guidance Standards Matrix Accreditation the first Connexions Company in the North-West and the second one in the UK. Alongside the accreditation the unit established a quality improvement team (First to be set up in Connexions) ensure that the company is at the forefront in terms of quality standards. The unit developed a new interview assessment tool, support and supervision and peer support system for its guidance workers. A further 4 team members achieved British Psychological Society Level A, one team member Morrisby Test Administration Certificate and 3 team members are trained to use GENED.

4. Areas of innovation

Advance developed range of eye catching marketing and promotional material including, posters, leaflets, handouts/flyers and a portable stand for small events. See Appendix 9 The team extended opening hours and arranged open events at Connexions Centres e.g. Burnley and Lancaster. CV workshop for new staff at Fleetwood, St Annes and Lancaster tailored to helping Connexions Advisers identify help they can give to adults on CV's and know when to refer to Advance Team for specialist CV guidance. All the teams have made use of interest-based careers software and then access to live vacancies and learning information on line. Team trialed two new interest guidance tools – Careers Interest Inventory and Quicksan Pathfinder with beneficiaries in community locations where ICT was not available. Conducted Morrisby Assessment in wider range of locations and field trialed GENED Assessment in Burnley/East Lancashire Area.

5. Identification of areas of good practice and areas for improvement

5.1 Good Practice.

The Team administered Morrisby Profile Assessments in a wide range of community setting in particular in East Lancashire. The venues used were from the community/voluntary and close to where beneficiaries lived. Feedback has been very good and the organisation has undertaken an analysis from the beneficiary feedback/follow up to see impact in terms of added value. Initial findings have indicated that beneficiaries who answered the follow up letters who completed an Assessments (note it is not suitable for all customers) saw a 25% reduction in the having non solid destination. See appendix 11 for data. See appendix 10 for details of the main product that was used.

The Project Manager and Team Leader have introduced new interview observation assessment document linked to the company performance review programme. Internal links with Connexions 19-25 transition teams for clients with special needs were established to develop an effective referral system for clients requiring adult services. Follow and referral from National Helpline enquirers from young adults interested in Modern Apprenticeships was

developed through the project. Enquirers were referred for guidance appointments.

A review was undertaken of the appointment system to overcome issues of non-attendance. Improvement to beneficiary information packs, updating of guidance resource materials that beneficiaries take home was undertaken during the project. Increased usage of vacancy (paid and voluntary) and course search via internet. A weekly News Sheet of local and national labour market information and new developments in education and Training was produced and circulated to the team. Also team members had access to Connexions LMI update Service.

Team group email was used to highlight good practice and exchange information and currently a new company intranet is being developed which has a team info exchange. Use of email to check and give feedback on beneficiary CV and letters of application.

Increased and extensive networking with outside agencies including Job Centre

Intensive initial follow up to beneficiaries not attending initial interview to enquire about non-attendance and book further appointment if required. Centres where non-attendance had been an issue customers were contacted the day before to remind them of appointment time.

5.2 Areas for improvement

In terms of improvements the Project Management Team have identified a number of issues. Some group work was limited to because team members were unable to access suitable venues, an audit of venues will be undertaken for future projects with recommendations for minimum standards. In location where accommodation is not of the required standard efforts will be made to find alternative venues.

Monitoring the quality of action plans more closely will be implemented. The Project Management Team will need to maintain high profile and links with Job Centre Network in particular communication changes in eligibility and target groups. Formalise communication/marketing plan with District /local Job Centre Managers.

Further research is required to review non-attendance at guidance interview appointment times. Stronger links with LSC are required for future projects to provide improved referral and opportunities for 20-24s interested in Modern Apprenticeships. Team members commented on lack of opportunities in some skill sectors and unwillingness of WBTP to take older trainees. This caused some issues in guidance interviews where beneficiaries had responded to National Advertising and then found opportunities were limited in some locations.

Finally follow up arrangements will be reviewed with reduction of initial follow up from 12 weeks to 8 weeks.

6. Lessons learnt, which will shape future provision, or would run a better project in future

The project manager asked the team for their ideas on lessons that have been learnt from project.

Overwhelming concerns over the paper work and in particular barriers/concern when initially seeing beneficiaries in community based setting. The team would like to see the paperwork kept simpler but that is unlikely to happen in the future. Team member found IAG partners longer to input records and update than the previous CORE system, also have recommended number of changes that have been fed back to now! /Reidmark including creation of fields to update and record follow up activities. Some team members found the system difficult to use although that has improved through training and experience Also the new data system is internet based which has advantages over the network based system in terms of access but has a down side if web is not available. In terms of implementation for the future team members will need longer to input and update data.

Turn up rates for appointments deteriorated in the later half of 2003. Main reason seems to be nature of some of beneficiary groups chaotic lifestyles where other priorities take precedence over work and learning goals. In some cases improved labour market opportunities led beneficiaries gaining employment quicker than expected and forgetting to notify centres so others could be brought forward. The team tried a variety of ways to remind/encourage attendance (note similar problems in NHS) team would like to look at charge for non attendance or having a non refundable deposit (both these would be disallowed under ESF rules) To conclude will look at incentives/ stressing benefits of accessing services and consequences and impact on others if non attendance is not notified.

Some of the team had concerns about the marketing and with Connexions Lancashire having the dominant brand feeling that Advance was losing some customers. This has been partially addressed through the recent changes to some of the key messages in the branding. But it is clear that further work will

need to be undertaken to establish the Adult Services Advance brand alongside Connexions.

From a Project Management view, it is clear at the initial contract meeting clarity is sought on the following

- Management information requirements
- Management report requirements
- Batch upload requirements
- Walk through of future audit requirements

Also to look at meeting beneficiary targets three months before end of project to give additional time to finalise evaluation and tracking/follow up data.

The following observations from the evaluation of the ICT/MI with clear recommendation for the next round-Advice and Guidance Pays 2 is

- Confirm with LSC in detail all batch load/MI requirements at the beginning of the project.
- Conduct walk-through of MI process with LSC ESF audit team
- Communicate any changes to delivery partners at the onset of the project start.
- Conduct walk-through with delivery partners to minimise data error.
- Implement data monitoring system at the end of each month to highlight errors.
- Conduct paperwork audit on a quarterly basis to ensure contract compliance.
- MI/Batch upload –standard item at quarterly Steering Group meetings with delivery partner/now! feed-back on process.

7. Dissemination of good practice including details of dissemination materials produced

The whole Advance Team meets together once month for Team Meeting and an opportunity is provided to disseminate good practice. The teams have group email and shared drive. Materials are placed on drive for all team to have access. Also Team update one another through group email which will be eventually be the Advance Intranet site. Examples have been dissemination of handouts for individual and group work. Team members designed and implemented a new information for customers handout see Appendix X this was distributed alongside new procedures to all staff involved in adult work.

The team, also had a rolling programme of training and visiting speakers to update on developments e.g. LCVC Social Services Volunteer Service and JobCentre Plus.

8. Details of publicity undertaken, including copies of IAG Advertising

Advance developed a marketing plan alongside the Advice and Guidance Pays Project see appendix 12 with a style guide Appendix 13 and a range of materials including leaflets, web site, posters, display stand. One resource that was purchased was a portable and table for outdoor events. The team attended many events including Preston Mela, (Avenham Park, Preston Learning Together Partnership (Preston Outdoor Market), Open Evening at Lancaster Connexions Centre, Saturday Open Day at Burnley Connexions Centre. Town Centre promotion at Fleetwood, Blackpool, Blackburn and Preston. The Team also produced regular press releases to advertise IAG Services.

All Connexions Centres received new signage to promote the Advance Branding. The company also conducted a full review of its marketing and promotional materials consulting adult user groups and team members. All feedback has been incorporated into future strategies.

By September the project was hitting total guidance session targets. However, it was not reaching some of the priority groups, primarily people between 20 –25 out of work for 6 months or less and people with basic skills needs. This was a similar position with the Advice and Guidance Pays Project. The Project Manager who is also a member of the Advice and Guidance Steering Group agreed to support a joint campaign with now! Network.

A newspaper campaign was undertaken in October 2003 with full-page colour advert going in the Blackpool, Blackburn and Lancaster and Morecambe Citizen newspapers on Thursday 9th October. It also went in the Accrington Observer on Friday 10th October. These publications hit the areas covered by the project and have a combined readership of 258 940.

The adverts included an invitation that could be cut out by the client and taken into the participating centres. The rationale behind this was to break down any barriers that a client may have about walking into a centre. The client may feel more confident if they have an invitation to hand over to validate them being there.

The adverts also stated the service and invitation to guidance was valid until 31st December 2003, until the end of the project.

Illustrations were also used to compliment the text and describe the services on offer e.g. a computer. These images have been used on the now! Network leaflets displayed in all centres.

During the last quarter of the project 7 people were referred into basic skills provision, this was higher than Quarter 3 (2 people). 75 people aged between 20 and 25 accessed the service in the last quarter with a total 278 accessing the project over all 56% over profile. A total of 134 client in that age group were out of work for 6 months or less 12% below target for the year, with quarter 4 having the highest performing ratios of between age 20-24 and length of unemployment less than 6 months during the whole project.

9. Case Studies

See attached selection of case studies

10. Views of customer and / or partners

All customers received a follow up questionnaire after 8 weeks accessing the service. (With the exception of beneficiaries who accessed services in December, questionnaires would be received after the project had finished) See Appendix 15 for example of questionnaire/letter. If no questionnaire was returned then the Adult Guidance Adviser who initially interviewed them was asked to contact them by phone and complete the questionnaire and send it back to the Administrator. All details were logged on to an excel spreadsheet and analysed; all destinations were entered on the IAG partner database to be included in the closure report.

A total number of 671 beneficiaries received questionnaires, 251 returned questionnaires or were contacted on the phone. 37% return rate. (See Appendix 11)

The beneficiaries who made comments about service provision 93% made positive comments that the service had met their needs. See appendix 16 samples of comments

117 (47%) beneficiaries who responded to the follow up have found or are still in paid employment

53 (46%) are in full-time paid employment
 40 (34%) are in part-time paid employment
 13 (11%) are still working part-time
 11 (9%) are in either full-time or part-time employment

18 (7%) beneficiaries who responded to the follow up are now doing voluntary work.

80 (32%) beneficiaries who responded to the follow up have started a learning programme/course.

29 (36%) are in full-time learning
 41 (51%) are in part-time learning
 10 (12%) are in either full-time or part-time learning.

7 (3%) beneficiaries who responded to the follow up are now self-employed

59(24%) beneficiaries who responded to the follow-up have no solid destination yet.

Comparison with base data, follow up evaluation and appendix 3

Initial Situation 720 beneficiaries		Follow up beneficiaries 251		Final Appendix 3 720 beneficiaries
Employment under 16 hours	23%	Employment (pt/f/t)	47%	30%
Non employment	4.5 %	Learning # note some are also working	32%	10%
Self employment	.5 %	Self employment	3%	1%
Unemployed	72 %	Voluntary work	7%	0%
		Non destination/unemployed	24%	54%
	100%	Other		4%

It is difficult to draw direct comparison from the set of data as we only have 37% return, however it is clear that there has been

- Decrease in the numbers unemployed and if it is assumed that majority of non-destination still unemployed. If you take the follow up data/final appendix 24 + 54 divided by 2 = 39% compare with initial 72% movement of 33%.
- Similar calculation for Learning 32+10 = 21.5%. Most of the beneficiaries were not in learning at beginning again movement into learning
- Similar calculation for employment 47+30 = 38.5% which equates to decrease in unemployment. (1)

Overall customer feedback has demonstrated impact with decrease in unemployment levels and with beneficiaries' activity accessing learning and work. Clearly making the case that IAG does pay.

12. Sustainability of project activities (Exit strategy) mainstreaming

During the latter part of 2003 the Project Manager reviewed alternative streams of funding to seek ways of continuing service delivery. This involved a joint approach with now! and other guidance deliveries to apply for round 2 LSC and Job Centre Plus Co-Financing. The now! Network was successful in applying for funding from LSC to continue activities across Lancashire but Job Centre Plus only contracted for activities in the West. Advance has also been successful in attracting Neighbourhood renewal in Preston and ERDF through now in East Lancashire but at the time of writing

has a shortfall in budget for 2004/5/6, as the total annual ESF is now lower than 2000-2003 per year. The Government may release further funding for core advice services but guidance services are at risk.

The Project Manager has produced a paper for Connexions Directors outlining budget deficit for 2004/5.

Also details will be communicated to LSC and JobCentre Plus highlighting impact on service delivery and future deployment of qualified NVQ Level 4 guidance staff.

13. A comparison of how the project dealt with information communication technologies, equal opportunities and sustainability compared to project proposal

The Advance project manager contracted internally with EFACT Team to complete the management returns to LSC. The EFACT Team had provided the MI returns for the previous two GONW ESF Objective 3 IAG Projects 1999- 2002 and had had a dedicated MI system CORE Plus that had provided the Quarterly MI returns. The system was adapted to provide the LSC Co-financing returns. In April the LSC asked the Project to provide a batch upload to Coventry and to collect revised MI in form of Short Event Record (this was replaced in August by a new Short Record). The EFACT team worked with software house Career Vision to produce amended system but it became clear that this was going to be difficult to achieve. Meanwhile the now! Team managing the Advice and Guidance Pays Project had been having discussions with Reidmark the software house that had designed Information and Advice MI system to see if the system could provide the LSC return. With effect from 1st August the Advance team took over the total management of the Advance your Career with Confidence Project. (The EFACT Team had been originally contracted internally to prepare the appendix 2/3 MI from the Connexions CORE Plus database).

This coincided with decision to use the new IAG Partner system that had been developed in August 2004 by now! Network and Reidmark due to the difficulties of developing the upload of the beneficiary client data via the Batch process using the CORE Database. The Advance Administrator and team members from EFACT transferred all the data from the CORE database to IAG Partner. A 100% audit of the electronic and paper records was undertaken to ensure that all paperwork matched the MI system and appendix 3 reports that were sent to the LSC. This process helped to record actual clients seen since the beginning of the project and to take out any paperwork that was compliant.

The reason for the variations within the appendix 3 reports that were sent to the LSC are as follows

- A cleansing of the system, which reflects the attention to detail given to, the Advance Administrator audit of the records.
- Rectification's of incorrectly inputted data (this as a consequence of amongst other things, changes to ICT data system, training/familiarity issues, changes by LSC in terms of their requirements i.e. Short Event Record to Short Record, methodologies etc
- Entry error in terms of confusion between similar co-financing projects i.e. Advice and Guidance Pays.

The realignment process did highlight discrepancies between electronic data (batch uploads) and the hard copy appendix 3. This was communicated to the now! Team and Reidmark and this were rectified.

By October the quarterly report completed successfully and the LSC indicated that they were confident that the new appendix 2/3 reflected an accurate record of client delivery. However, they did indicate that the ESF Audit Team would require to conduct a detailed site visit in January to evidence that all documents were compliant. (This was undertaken on Jan 21 and Advance has received feedback to confirm data is compliant)

From August through to September the Project manager organised an intense training programme to support team members delivering the contract. Over 18 Adult Guidance Advisers and further 60 Connexions support staff (Connexions Advisers received training over an 8-week period. Further ongoing training is still taking place and recommendation have been communicated to now! to incorporate changes within the IAG partner for the Advice and Guidance Pays 2 2004-6 Project.

14. Details of any tools which have been used to evaluate the impact the project has made and a note of innovative practice

14.1. Questionnaires

Each beneficiary received an evaluation/follow questionnaire with prepaid envelope 12 weeks after initial contact. Team members contacted beneficiaries not responding. All data was analysed. See Appendix 19

14.2 Case Study

Each Team member completed 2 case studies. See Appendix 14

14.3 Action Plans

Sample evaluation was undertaken to review quality including good practice training session for all team.

14.4 Contract

Appendix 2/3 and Short Event / IAG partners data was analysed see Appendix 1

14.5 Mystery Shopper

During March all Connexions Centres received Mystery Shopper phone call to measure effectiveness of signposting and referrals to Advance Guidance Services. (See Appendix 20)

14.6 Implementation/Marketing Plan/Original Proposal

Quarterly review against milestones. See Appendix 21

14.7 Monthly check of Short Record / Advance data inputting

Undertaken by Administrator plus check against IAG partner data.

14.8 Customer Satisfaction Survey

Sample undertaken in March 2003

14.9 Matrix Assessment

Undertaken in April

16. Conclusion

The project was successful in meeting its key objectives as set out in the project proposals. The supporting evidence outlined in the report shows a clear link between specialist guidance and a significant movement into work and learning even over a relative short time span. It would be interesting to measure the impact of a fully funded Adult IAG. Disappointingly overall funding (if you include Job Centre Plus Co-Financing) has been reduced and IAG providers like Advance will reduce levels of service delivery over the next 12 months. This will see a reduction in the number beneficiaries accessing services across Lancashire and a potential loss of skills if specialist guidance redeployed into other activities.

Mark Willett
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27 January 2004

Appendices

1. Appendix 3
2. Gender
3. Qualifications
4. Ethnicity
5. Disability
6. Destination
7. Status
8. Location
9. Marketing Material/Displays
10. Psychometric assessment –Morrisby Profile
11. Destination Report
12. Marketing Plan
13. Marketing and Promotions
14. Case Studies
15. Follow up letter/questionnaire
16. Comments
17. Circumstances
18. Further advice
19. Data Report
20. Mystery Shopper
21. MS6 Analysis of MI and Qualitative report Q4