

preparing for enhanced services
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DISSEMINATION EVENT

8-9 MAY 2003

REPORT

department for

education and skills

creating opportunity, releasing potential, achieving excellence



Learning+Skills Council



Millar MacDonald

Acknowledgements

I am sorry to tell you that shortly after this event, Rosemary Schofield - who gave such a very good presentation on the work of SAGE - was taken ill and unfortunately later died in hospital. She will be sadly missed by all who worked with her and the guidance community.

I would like to thank all the Adult Guidance Pilots for their hard work over the last 15 months and particularly for their participation in this event and the marketplace.

I would also like to thank RS Live for staging this event at very short notice and providing us with such an impressive set design.

I would especially like to thank the Merlin team who contract managed the pilots and helped organise this event.

Finally I would like to thank all the delegates for taking part in this event.

A handwritten signature in black ink, appearing to read 'Millar', with a horizontal line underneath.

Millar MacDonald
Department for Education and Skills

Preparing for enhanced services

DfES conference

8-9 May 2003

Le Meridien Hotel, Manchester

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Introduction

This conference was held to look at the work done by a series of adult guidance pilots, which were trying out ways to offer more in terms of advice and guidance. The LSC are now preparing for enhanced services in information, advice and guidance partnerships all over the country, so it was an ideal moment to share the experience from the pilots at this event.

This was considered in the light of three major themes, vital in the development of these services: widening participation, enhancing clients' progression, and meeting national targets.

Representatives from the pilots came along to explain how their projects worked, what they were able to achieve, and the kinds of problems they met along the way. They concentrated particularly on the practical issues - the things those taking forward enhanced services in the future would need to know. This was an extremely useful exercise in helping to develop the new enhanced services and identify the groups of clients who can benefit from them.

The conference was also an opportunity to give the LSC perspective, as they will be developing the new services, to discuss the implications, and how enhanced guidance services can work locally.

Delegates came from IAG partnerships and local LSCs, careers services and Connexions partnerships, plus representatives from community groups and projects involved in the pilots. These are the people who will be involved in taking forward the ideas and lessons from this stage to provide widespread enhanced services.



Pat McDermott

The event began in the evening on 8 May, with a dinner and speech from BBC presenter and former athlete, Roger Black. On 9 May, Millar MacDonald from DfES and Patricia McDermott from Merlin Minds Ltd gave the background to the pilots and how they delivered their services. Then there were three sets of presentations from different pilots - each set looking at one of the three themes, and how the pilots dealt with those issues.



Through these presentations, they were able to compare and contrast a whole range of things tried out in the pilots using different models of delivery, reaching different groups of clients, working in different locations.

At various times during the day there were opportunities to ask questions and talk over the issues, then give feedback. There was also the chance for delegates to talk in more detail with people from all the pilots, in the 'Marketplace'.



John Smith of Merlin Minds facilitated the event, introducing and co-ordinating the presentations. Merlin Minds Ltd was appointed by DfES to contract manage the adult guidance pilots.

Delegates were clearly engaged by what they heard and the day created a great deal of buzz. The pilots had produced plenty of evidence that guidance works and that it makes a difference to people. They provided some really compelling arguments for the economic benefits, and achieved a great deal, especially in relation to the three themes. They certainly helped to move forward the thinking on adult guidance.

Altogether, the information presented was an excellent starting point to build on for the future.

On the evening of 8 May, Roger Black spoke about his experience of using guidance, and how it helped to motivate him and make new career choices. He made a number of important points:

- *it is vital to embrace change and avoid complacency*
- *you need a passion and desire to achieve your goals and this is evident in the work of the guidance pilots*
- *champions are proactive, not reactive*
- *the importance of relationships with a coach or mentor, and working with like-minded people*
- *people have to make hard decisions in life - guidance can help them make those decisions and change their lives - set themselves goals, achieve and reach their full potential*
- *you must share best practice*
- *you need a shared belief and belief in each other - the greater good of the team is more important*
- *people have to take ownership of their own destiny - anyone is only as good as their last race/interview*
- *the essence lies not in victory, but in the struggle - the journey you travel.*



Roger Black

Background to the Adult Guidance Pilots

Local information, advice and guidance (IAG) partnerships were set up in 1999 to co-ordinate and improve adult IAG services in England. The programme aimed to make sure that consistently high quality, free services were available locally all over England.

In March 2001, £5million was made available to 'pilot the delivery of free in-depth guidance services to help the most disadvantaged in our communities'. A total of £3.8 million was spent. Around November 2001 the pilots started work.

The main purpose of the pilot projects was to explore different ways of helping disadvantaged people overcome the barriers stopping them entering learning and work. They aimed to find out how much value could be added by offering in-depth guidance, complementing the basic information and advice services already offered by IAG partnerships. They offered services in a variety of settings suited to their clients' needs.

The pilots targeted people from a number of priority groups, including:

- *people with disabilities, and learning difficulties and disabilities*
- *people who have problems with basic skills*
- *people with low skills or outdated skills, whether or not they are in work*
- *people over 50, especially those at risk of becoming unemployed or economically inactive*
- *people returning to the labour market after a break*
- *offenders and ex-offenders*
- *people whose first language is not English*
- *people living in areas of high unemployment and social deprivation*
- *people in remote rural areas or areas with poor transport links.*





Any IAG provider could bid for funds to run one of the pilots, as long as they were based in England, and accredited by the Guidance Accreditation Board. They could be a national organisation, or collaborations of different IAG partnerships or providers. Bids from or including community and voluntary organisations were particularly welcome.

An evaluation programme ran alongside the projects, measuring the demand for the pilots' services, and showing the economic and social benefits for the identified client groups. Pilots had to track the outcomes for their clients, during and after delivery of the service. The evaluation report from Mori/IES is due at the end of Summer 2003.

How the pilots have developed their delivery models

'Guidance' is difficult to define, but it is a process consisting of lots of different activities and interventions. The range of activities includes informing and advising, along with counselling. Some pilots used others, like one-to-one and group sessions using computer programmes to help clients analyse their skills and interests. They found practical applications for guidance theories, for instance on how to go about making decisions.

The most disadvantaged people often need more support, and advocacy may be vital for them to progress. Sometimes the appropriate provision does not exist or they cannot access it, and at times like these guidance providers have a critical role to play in passing this information on to learning providers.

Planning these complex, multiple-activity services takes a lot of time and work to build the infrastructure. It is essential to know who you are targeting and why, how you can reach them, and how you can make sure clients get access to the full range of activities. Where services are delivered from can also be critical - taking your service to clients often works well, through outreach.

Another issue faced by the pilots was capacity to cope with demand. Many had problems with staffing, recruitment and training, with a shortage of advisers qualified to NVQ Level 4. Some recruited from their local client group, and found that people responded well to others from their own background. Others found that consultation with partners, who already had experience of training, was useful in training new advisers.

Feeding back information was often ad-hoc, and needs a more structured approach. Pilots needed to plan to develop a system for collecting, collating and feeding back information about the barriers clients are facing.

The Marketplace

Although only a few were able to talk about their work in the seminars, the Marketplace gave all the pilots the opportunity to present what they have been doing.



Each had a 'stall' where they could display materials they had developed and used. They could talk in detail with people from local LSCs and IAG partnerships, and discuss who their clients were, what they did and how they went about their work, and the outcomes. Delegates were able to quiz the pilots about their activities, the issues they faced and the solutions they came up with.

The marketplace was open at various times during the conference: on the evening before the event, and at various times throughout the following day. Some of the stallholders also stayed on at the end of the conference.



This generated huge interest and created a very 'buzzy' atmosphere. All the pilots put a great deal of time and effort into preparing their stalls, and sharing their information with other delegates.

Presentations

Widening participation

HOSTED BY STUART MCRILL, MERLIN MINDS LTD

This session looked at the way the pilots provided guidance and how they had made a difference in reaching new clients and motivating them to start on learning or to move into work.



Stuart Mcrill

Linda Roberts, Chief Executive, WIRED

(Wirral Information Resource for Equality in Disability)

Client group: people aged 20 to 65 with physical disabilities, hearing or sight loss, learning difficulties, mental health problems and developmental disorders.

Issues for these clients include:

- **lack of confidence**
- **low expectations of disabled people**
- **many have not had a good quality education**
- **lack of awareness among training providers and employers**
- **poor physical accessibility to premises**
- **communication difficulties**
- **tension with carers (parents don't always want their children to move on)**
- **the benefit trap.**

Different 'models' of disability also create a barrier for disabled people. Most people probably think about disabled people following the 'medical model', focusing on their impairment and what they can't do, and don't recognise that people are as much disabled by society - WIRED prefer to work within the 'social model'.

WIRED has over 27 years' experience of working with this group, which gave them anecdotal evidence that an enhanced guidance service was needed, and there were some statistics to back this up.



How they worked:

The methodology used varied, because the client group varied, though much of the work involved outreach. Some traditional models needed some adaptation to be of best use to the clients. As many had no transport, WIRED's advisers frequently went out to visit them at home.

Many clients had other issues to deal with before they were ready to think about learning or work. WIRED was able to refer many of them internally for information and advice, advocacy and direct payment support, as they have so much experience as a disability organisation. However, they often also needed help from other organisations.

To find and make contact with more clients, they produced marketing and promotional material in a wide range of formats, and had to think carefully about where the information was placed. They were left in places like supermarkets and a range of places where disabled people might go, as well as day centres and Shopmobility centres. They also sought out referrals from other agencies.

Issues for the pilot:

WIRED needed to adapt their processes and systems, particularly for gathering feedback, monitoring and evaluating their input to clients. They had to consider vulnerable adult protection, and the problems of sending lone workers out to people's homes. They occasionally needed to resource training that was not otherwise available, which meant working with local employers and job brokerage agencies.



Linda Roberts



Outcomes:

The figures show that the programme has widened participation among this group of clients. 15% of the people WIRED worked with are now in voluntary work, and 56% are in training or further or higher education, although much of this is not mainstream provision. Seven clients have moved into full-time work, and two have started their own businesses.

As for value for money, they helped around 100 clients at a total cost of around £50,000 - about £500 for each client. And taking one example of taxpayers' money saved, one young client who was enabled to start her own business would have been paid benefits totalling around £95,000 if she had had to claim benefits all her life instead, plus all the social care, health and housing costs.



Rosemary Schofield

Rosemary Schofield, Skills Guidance for Employees (SAGE), and Director of Lifetime Careers Ltd

Client group: employed people, including people over 50, especially those at risk of becoming unemployed, and people with low skills. Some were self-referred, while others came through employers.

The pilot was based in South Yorkshire, where the steel and coal industries are in real structural decline, and there is a move towards the service industries, with lots of call centres. These changes came as a blow to the confidence of local people, destroying their understanding of the labour market. Although unemployment is quite low in the area, many people have low skills and basic skills needs.

Two guidance companies were involved: Sheffield Futures (in the Sheffield area) and Lifetime Careers (in Barnsley, Doncaster and Rotherham).

How they worked:

SAGE worked in various centres such as community centres, but also used outreach, attended events, and looked at ways to deliver their services in the workplace. Learning centres were a way of bridging that gap.

They offered a whole range of guidance activities: one-to-one and group sessions, information and advice, and assessment. They aimed to be flexible to meet individuals'

different needs. Some methods were innovatory, for example the package called Skillsolve which was used with individuals and groups to analyse their training needs, and for employers by comparing different locations (eg are customer care skills better in one area than another? what training do different employees need?).

To bring in people referring themselves, it was possible to promote the service around target groups, in community bases and agencies like community learning advocates.

SAGE also considered other locations, worked closely with the WEA who were doing basic skills courses, and took referrals from other agencies through the IAG partnership. However, it was more difficult to market the service only to the target groups in a workplace. It was necessary to place publicity materials in different places than in the past, as they were aiming to find employed people - they tried places such as leisure centres and GP surgeries.

Their larger emphasis was on work in workplaces, which required more effort to establish. They made contact with people like chambers of commerce, basic skills providers, learning centres and liP assessors, as well as contacting employers direct through mailshots and cold calling (especially public sector employers such as the NHS and local authorities, which had initiatives on basic skills, or moving minority groups through promotion). They talked with Jobcentre Plus about referring people just going into work who needed a bit more support to stay in work.

SAGE took part in various promotional activities including attending events, presentations, team meetings, displays, briefings - which gave them contacts with different intermediaries. They also put on their own conference which they found very useful.

Issues for the pilot:

Although the original intention was to build on earlier work, it soon became clear that more development work was needed. They had also intended to work closely with Business Link and TUC learning reps, but for various reasons that did not take off. This meant they had to work on increasing self-referral, and helping employers to understand what was on offer. There was much more of a developmental period than had been expected. As more contacts and relationships were set up during the project it became obvious how much more effective it was as many more came on board.

Because they weren't integrated as a project, they did not have access to particular funding for training and advisers found that difficult at first - they could advise people



or employers on what training they needed, but there was no funding to support it. The people involved were often the ones who were outside existing provision.

Working with employers meant reflecting on how to use business language - the same process uses different words to those used in guidance. Also, working with employers meant that timings were not within their own control (things had to fit in with employers' training or other schedules), which was difficult within a time-limited project.

Outcomes:

There has been some very good feedback from individuals and employers, that the service has been quite flexible. Tracking individuals is beginning to show that people are more likely to stay in work as a result of SAGE's intervention.

The SAGE conference was a great success in raising SAGE's profile and as a way of integrating with other developments. The dynamics between the individual and employer really makes the case for the role of guidance: they were working with both personal and business development, helping people develop, but also helping employers to develop their people for their business purposes.

Sarah Collison, Bitesize Guidance

Client groups: priority groups of people aged 20 and over, living in remote rural areas or other areas with poor transport links. People with outdated or low skills, in or out of work, people in areas of high unemployment and social deprivation, older people in more urban areas, people with disabilities, women returners, and offenders in Her Majesty's Young Offenders' Institute Northallerton.

People in rural areas face issues of isolation, lack of adequate transport, and difficulties accessing support services. Access to guidance is a serious issue - people could have to travel 20 miles, which is a significant barrier and a real disincentive.

Bitesize worked in North Yorkshire, which is a large and predominately rural area. It combines areas of prosperity with communities suffering relative poverty and rural disadvantage. As a whole, unemployment in the county is below the national average, but this masks pockets of high unemployment. There is also a mismatch of skills, with two-fifths of employers unable to attract people with the right skills.



The decline in agriculture is causing many farmers there to diversify, and the coalfields have closed down in Selby. Some of the urban coastal wards in Scarborough are among the most deprived in England.

This bid was particularly important as there was no other free guidance available. Previous contracts had shown a demand for guidance, which grew as projects were established - when funding stopped, adults in these areas became disadvantaged once more.

Guidance Services was the main partner, who already had qualified guidance practitioners. Ten part-time advisers enabled them to cover the whole geographical area of the county.

How they worked:

Bitesize aimed to address the barriers experienced by these groups by linking guidance to existing information and advice providers, and delivering a free service on an outreach basis. There were careers centres and information shops in six main towns, but they wanted to move away from traditional one-off in-depth interviews, and allow people to come back as many times as they needed.

They used an integrated IAG process to support individuals in developing realistic, achievable learning and career management plans. This involved short, 'bite-size' interventions, in-depth guidance interviews (using DOTs and Egan Skill Helper),





group or individual sessions, follow-up, e-mail access and focus groups. They also funded a range of partner agencies to increase the capacity of the IAG network. Community-based organisations could bid for development funding to deliver educational guidance where there were gaps or limitations.

A telephone helpline service enhanced the existing helpline by engaging clients in extended conversation to find out their guidance needs and provide guidance. They used the DOTs model over the phone. They also set up an e-mail service so that clients could access the service through ICT.

To secure more and better referrals, Bitesize aimed to build the capacity of partner agencies to make contact with harder-to-reach clients. The agencies could identify clients' needs and refer those most likely to benefit from guidance. Guidance workers had regular drop-in times to meet staff and clients.

Outreach was a crucial element in engaging clients: practitioners could go to the clients regardless of where they lived in the county. They were able to buy laptops, printers, software, mobile phones, and set up internet accounts for jobsearch or LMI, which are needed for the outreach model. Partnership working was absolutely key. Many locations were used, from careers centres to interviewing at pitheads, prison or community post offices.

Marketing the service involved lots of promotional visits, linking through organisations such as CABs, libraries, learndirect centres and WIs. Area learning partnerships were a key mechanism, health and social services were particularly useful, and school governors and PTAs helped in targeting women returners. They produced postcards, self-help guides, and a newsletter which went to 500 people in the county.

Issues for the pilot:

Open access was a strength, but also a weakness - due to the diversity of the clients and their needs it was difficult to build up a cohesive expertise. There was also a great demand for the service, which created a tension between traditional delivery in a careers centre (where demand is constant), and being innovative and doing outreach - it takes time to build, and for trust to be gained.

The take-up of the e-mail service was disappointing: people did not think it was personal enough. However, it has proved useful as a follow-up mechanism and to give information after the initial intervention.

The pilot didn't appreciate the complexity of the management information required to begin with, so it took more project management time than expected. Partners also found it hard to recruit and maintain staffing for NVQ Level 3.

Outcomes:

Adults were now getting professional guidance, widening participation from community groups in IAG and referral. Related projects look like they are going to take off from this - SureStart, the Early Years Partnership and NSPCC are all interested in providing this provision if it can be funded. This much better integrated IAG programme has had overwhelming support from adults, with an almost 95% satisfaction rate.

So far, of 1570 clients, 313 (20%) have moved into work, 16 into voluntary work, and 3 into self-employment; 455 (29%) have gone into some form of learning (full or part time, further or higher education), and 11 have gone into other types of provision such as New Deal.

Key messages:

- *Outreach is essential to bring in new clients*
- *A great deal of marketing and promotion is needed to get across what the service can offer*
- *Think carefully about where you advertise to reach your target groups*
- *Networking - build contacts and relationships with other organisations in contact with potential clients*
- *Keep services flexible to meet the needs of clients*

Enhancing progress

HOSTED BY SALLY HUGHES, MERLIN MINDS LTD

In this session, we heard from three very different projects about how they included measures for enhancing client progression - the distance travelled and the steps along the way - to see what difference guidance made from the client's point of view.



Sally Hughes

Jenny Hughes, Friendly Face

Client group: offenders in HMP Liverpool Prison.

How they worked:

Friendly Face developed and adapted their methods during the project to meet the diverse needs of the client group. Initially, they tried to anticipate these needs, then realised they needed to talk with the clients to find out what they needed and how to target guidance specifically for them.

They were then able to produce a very flexible programme of ongoing enhanced guidance, which included one-to-one interviews, and work with small and large groups. They also brought in a range of partner agencies from various professional backgrounds.

Many clients received on average 50 hours' group work, and at least 25 one-to-one interviews - some very in-depth support. Each worked with several advisers, to avoid a culture of dependency, where one person became a key link for that individual. Friendly Face also developed a range of activities such as producing newsletters, getting the men to write about their life experiences, and submit poetry, case studies and comments on issues they wanted to cover.



Jenny Hughes

Beginning with sessions around confidence-building, motivation, how to develop your own personal support network, they used the expertise of other professionals to help shape the provision. They found in general that offenders were more likely to take up provision after leaving prison if they had met the key players before they were released, so it was very important to bring the agencies in. This involved a lot of active marketing, making links with organisations such as Jobcentre Plus, which already went into the prison, and for instance with NACRO, drug rehabilitation centres and legal professionals.



The newsletter proved a good resource for bringing in the other agencies. Photos of the men had a strong impact, helping people see them as individuals.

Tracking client progression:

Everything was stored manually in a database, including full action plans. All service providers had to provide copies of their paperwork as well so Friendly Face could see what was actually happening with each client. Sometimes they would give out evaluation questionnaires at the end of sessions to see if they were working or if people wanted them changed in any way.

Most importantly, once the men had left prison, they were tracked each month, through key workers, probation services and clients' families. The project used this information to compile some case studies.

One very useful idea was a six-week course on attitudinal change, run by a consultant. A questionnaire was used to measure people's confidence at the beginning and at the end - it was good for clients to see how their confidence had improved, even before they left prison.



Issues for the pilot:

One of the biggest barriers was having to work within such a huge prison, which houses 1,600 men. As a team of women going into a male prison, they had to be very sensitive to how they encouraged clients to participate. Access to the clients was often very restricted, and the prison has a lot of violent offenders so the project team also had to be aware of their personal safety. They had to understand the dynamics of the group, and be aware

of issues such as bullying, and knowing where and when to encourage clients to open up. Some of the key problems with people being locked up can be boredom and bad behaviour. The secret is to follow your gut instincts to spot when there is a danger point.

Outcomes:

In setting up a project like this, it is important to be persistent, and using the fact that you're doing something different as a lever for change, it will eventually filter through. Four prison officers are now going to be seconded to work with Friendly Face over the next two years, and will be trained in advice and guidance.

At the end of the project they held a celebration event and invited all the partner agencies. Partners talked about what they thought had worked in the programme, and several of the men spoke about what the project had done for them - the most valuable outcome of all, that clients want to get up on stage and tell people how valuable the work is, then you know you're doing a decent job.

In terms of 'hard metrics': it costs £17,500 a year to keep one inmate in Liverpool Prison. So far 70% of Friendly Face's clients have stayed out of prison, and are drug-free, which means they have so far saved the taxpayer £1,337,500.



Kalvinder Rayat

Kalvinder Rayat, Sandwell Sikh Community and Youth Forum

Client group: the original target group was the Sikh and Asian communities, but this later expanded to all the communities in Sandwell when it was found they all needed the service.

Sandwell Sikh Community and Youth Forum was responsible for making the community empowerment and development project successful - the whole project was about increasing the participation of the Asian community by offering information, advice and guidance. They acted as a link between the community and mainstream provision (these clients were not using the mainstream provision that was available). They were able to talk to clients in their languages and were sensitive to their cultures, but above all what worked the most was that they understood their traditions, which were vital to them.



How they worked:

The project offered one-to-one advice and guidance and follow-up on an outreach basis. They worked in local community centres and places of worship, and in conjunction with Jobcentre Plus, going into their centres and seeing clients there on a drop-in basis. A key aspect was that they offered an out-of-hours service, and were available in the evenings and at weekends, with an evening surgery three days a week until 8 o'clock. This was important as many of the clients were already in work but looking to get into better employment.

One way they marketed the service was to distribute bilingual leaflets and posters at a local festival and street fair which the community all take part in. On this one street, packed with people, it meant going out, meeting them face to face, explaining what service was on offer. This brought a big response, and the project maintained a clientele base from there.

The most successful routes were short courses and voluntary placements. They offered short courses such as first aid, basic food hygiene, health and safety at work, and found placements for clients through these in a variety of settings. This meant they could build on their skills but also use them as work tasters, which could help them decide what career field they might want to go into.

The project also organised a Sandwell employers' dinner to recruit employers. They were getting a big response in getting people into qualifications, and they wanted to move on from there and find a job. However, accessing employment was the hard bit: there were not enough employers on the books. The event was a successful evening and the project succeeded in recruiting nine employers, who now work quite closely with them.

The project was able to offer something different, because they were accessing the untapped, excluded community in Sandwell, by offering an outreach service when and where they wanted it. They supported clients and built a relationship with them.

The project provided an in-depth service, with ongoing support rather than just advice and guidance.

Tracking client progression:

Clients were followed up formally by letter and phone, but project workers also saw them regularly throughout the project as they came in to drop-in sessions.

Issues for the pilot:

They needed a dedicated and flexible staff who wanted to make a difference to their local community. One of the major problems at the beginning was recruiting qualified Asian workers, and the project started late because they couldn't find them in time. Then, as the demand for the service turned out to be greater than anticipated, they had to deal with staffing again and recruit more. They also had problems of one in three clients not turning up for appointments.

Outcomes:

The project achieved many outputs in getting people to achieve for themselves, whether getting a qualification or finding work. 55% went into learning, 43% have already achieved a qualification, and 17.5% have gone into employment. There was 100% pass rate on all the short courses, but they also brought about personal development, raised confidence and self-esteem, and motivated people to overcome the social and cultural barriers they face.

Margaret Darbyshire, Compass projects, Oxfordshire

Client group: people from cultural minority groups, often with non-UK qualifications, and many did not have relevant work experience in the UK. Many of the clients did not have English as their first language, and some had very little English at all.

Compass had identified that they did not have the resources to offer the level of service required by some of these clients, so they began work with a number of partners and found that the needs of this group were not being met.

How they worked:

Short information and advice sessions were not enough for this client group. They needed longer-term, in-depth, ongoing support to address some of the complex issues. By building on IAG provision and working with practitioners, they were able to offer the relevant service for this group. It was also important to recruit and train representatives from the minority cultural groups they were working with,

Margaret Darbyshire





and they have been able to acquire specialist equipment and resources to work with the client group.

Compass based their service on an outreach model, with one-to-one interactions at various locations. They used skilled helpers to look at complex issues and barriers with the client, and help them over a series of interactions to identify and begin to resolve problems. Advisers worked with them and referral agencies to ensure they achieved success. By identifying the barriers

to learning, and working with agency partners, they were able to give a whole range of services to support clients.

Group work sessions were also useful to raise awareness with the client group. They were used to explain what the service was about (many in the group didn't understand the concept of guidance or choice), and how the worker could help them achieve their aims. They produced quite a lot of literature to help clients understand the service, to be sure they knew what was on offer.

The support they offered was based on the UDACE model. They often had to advocate on behalf of clients when negotiating access to provision. Working with some clients in their first language also helped - they were able to talk in depth, which they wouldn't be able to do in English. Clients often needed support to join ESOL provision, such as escorting them to meet tutors, or to go to assessments, and with job applications some needed help to read and fill in application forms. Another factor Compass had a lot of success with was helping people with overseas qualifications to identify UK equivalents.

Tracking client progression:

The advisers had a number of interactions with each client over a period of time, so it was possible to build up a client profile in a very informal way. Clients would want to come back and talk about how they were getting on, and the successes they had had - this was the best method of getting feedback.

Compass were also able to encourage and support clients to go along for initial interviews and undertake a Mori survey. It took a lot of input from the project team to reassure clients, and make sure they knew where they were going and what the process was - very time consuming, but necessary if information is to be collected. One of the most successful things they did was to undertake case studies - again this is time consuming, but advisers can see the work they have done, the skills they have used, and clients gain a sense of achievement.

Issues for the pilot:

Because it was a completely new service, there were obviously a lot of start-up issues: one was the location of the advisers themselves, finding new premises and recruiting new people as Compass were new to this work. Workers needed to be located where it would be easy for clients to contact them, and that did prove a problem to start with.

There were not people already trained and qualified locally in Oxfordshire, so a lot of emphasis was placed on that training to build capacity. The level of training and support to trainees has definitely been worthwhile. However, the trainees were on a very steep learning curve, and there were difficulties getting them enough mentoring support. This showed how stretched the IAG network was in the area - existing practitioners would gladly have spent more time if they could. New advisers, often from more structured environments, had to adjust to this very independent way of working in outreach work, and managing their workload effectively.

Now, within the local IAG provision, the project is known to offer this support and people are now referred to them.

Key messages:

- ***Outreach is vital - going out into the community for delivery***
- ***Provide ongoing support for the clients***
- ***Cultural awareness and sensitivity to the needs of the client group***
- ***Collecting detailed data and profiles to show clearly the difference made***



Meeting national targets

HOSTED BY DEREK CRAZE, MERLIN MINDS LTD

This session heard from three projects which have engaged with significant numbers from their target group (collectively, they have touched the lives of nearly 4,500 people), and used a variety of methods. They focused on how the pilots contributed to the achievement of the national targets.

Peter Holtham, Black Country Guidance in the Community

Client groups: socially excluded groups and groups who were under-represented in learning. This included people like lone parents, people with disabilities or mental health problems, people over 50, or people with low or outdated skills. Another group included refugees and asylum seekers who have particular needs such as converting overseas qualifications. The four IAG partnerships in the area worked with the Black Country Learning & Skills Council to identify the target groups.

How they worked:

The project took a co-worker approach, on an outreach basis. Each client had two organisations working with them - a community organisation and a guidance organisation. The community organisation identified the clients and supported them through the process. This continued after the interview, to put into place the things in their action plan, arrange further interviews and so on, as necessary. The guidance organisation would then go out to the community organisation to do the interviews.

To ensure quality, all the organisations involved were part of the IAG partnerships, so they either had the old NQSLW standard or matrix, or were working towards it. The IAG partnership staff also organised training - one session that worked particularly well was on the difference between information, advice and guidance - showing the added value of guidance. Good practice was shared between the organisations, and staff in community organisations did NVQs in advice and guidance.



Derek Craze



Peter Holtham

The community organisations followed up and tracked clients, formally by phone and letter, and through informal contacts. Often clients would use their centre anyway, giving ongoing contact. However, the refugees were more difficult to follow up, as they were often moved on after six months.

Contribution to the targets:

41 organisations were involved, across four boroughs, and between them successfully interviewed over 1,000 clients. Of those clients, 20% went into work and 35% into learning - obviously contributing to the target of widening participation in learning, and most of those were also from non-traditional groups.

As 200 people have left benefits and started work, the project calculates that about £600,000 have been saved over a year. Also many of the refugees who went into work or training were able to convert their qualifications and go into productive work using the skills that they brought with them. The community organisation staff who are now studying for NVQs in advice and guidance are contributing to the national targets as well.

Chris Jones, Community Outreach, Hereford and Worcester

Client groups: people in rurally, socially and economically deprived areas, and people with special needs. Community Outreach is based in Hereford and Worcestershire - a large geographical area. Hereford is very rural, but Worcester is quite urban with pockets of social deprivation.

Their experience as an IAG partnership had shown that they were not really reaching people with special needs as effectively as they would like to, and these people need more support than could normally be offered. The guidance pilot gave them the opportunity to do that.

How they worked:

Community Outreach used a variety of methods. They put a great deal of effort into marketing and publicity, producing lots of leaflets and posters, purpose-built for every event they attended. As they were working with special needs groups, they needed to make sure the language wasn't too difficult and there were plenty of visuals. They also tried advertising in local newspapers, which didn't work at all, but found that advertising in local community and parish magazines was a real success. They also did things like going out with a



Chris Jones

sandwich board, blackboards outside community venues, giving out leaflets outside sports centres, YMCAs, libraries, and advertising in Jobcentre Plus offices. They held events called Routes to Employment, aimed at special needs groups, which were effectively mini-careers conventions. These were run in conjunction with Jobcentre Plus, in local colleges, shopping centres and so on.

In an attempt to get guidance out into the more remote rural communities such as the Welsh borders in Herefordshire, they tried using video conferencing. One of the local colleges had the equipment. For some aspects of the work - particularly advice and information - this is very useful, but advisers say it doesn't work so well for guidance. You don't have the eye contact, and you can't break the ice as you normally would. However, people who are very keen on IT were attracted to the video conferencing.



For follow-up to assess the impact of their work, Community Outreach appointed a tracking and administration assistant. Their role was to oversee the management information and tracking. The project found this an excellent way to deal with this, and are using the same approach for their next business plan. Consent forms were sent first to all clients, followed by letters asking what they had done after their interview. And when many people did not respond, the tracking and administration assistant took the office mobile phone home and called people in the evening. It was a really good time to do it - people were pleased to help out and gave really positive responses.

Issues for the pilot:

The first issue was about recruiting staff qualified to NVQ Level 4. This took quite an effort and took longer than had been hoped. In fact, only three of the intended four posts were filled. There was also a big need, before they could go out into the community, to network within the existing IAG partnership, with Connexions, with various special needs groups, community groups and with Jobcentre Plus (which was a key partner).

There were also various technical difficulties with the video conferencing, and the project were not able to set this up as they had intended, though a link was established eventually with Ross on Wye library.

Contribution to the targets:

20% of the clients went into employment, and 41% into some kind of education - 12% came off benefits, so the guidance was clearly making a difference. It has also definitely saved money: just the people coming off benefits has saved £54,000 a year, plus all the hidden costs. The figures showed continuous quality improvement too, and they were able to measure soft outcomes such as increased confidence and increased knowledge.

It has also helped with government targets such as basic skills and social inclusion - putting money back into the economy. And when more people are working, they are becoming taxpayers, so it is really adding value.

Sandra Furby, Future Prospects, York

Client groups: people from ethnic minorities, unemployed graduates, travellers, disabled people, people with low basic skills.



Sandra Furby

Even in York there are severe pockets of deprivation. Although less than 1% of its population are from ethnic minority groups, these small numbers mean they tend to be grouped together. There are no communities, so there are no projects in the city and no work for ethnic minority people. Future Prospects tried to be responsive as the project went on. For instance, when a train building company closed down, they were able to refocus their resources and help the people who'd been made redundant.

Future Prospects has around ten years' experience of this work, which helped them in choosing the target groups, and in how successful they were with some of them.

How they worked:

The emphasis was on flexibility - getting stuck in and seeing how things worked - the beauty of a pilot is that you can try things out and see whether it works or not. They decided to work in a very holistic way - taking into account everything including clients' benefits needs and housing issues. They did not deal with these problems direct, but helped clients work through each one. And if they referred someone, they would often take them along or the client would come back to them afterwards - Future Prospects stayed in touch with the whole process.

They worked very much in an outreach capacity, working evenings and weekends - taking the service to the clients.

To start with, there were only two ESOL classes in the city, and most of the students were Europeans. There are now nine ESOL classes as a result of their work. They used laptops as a hook to engage with people from ethnic minorities, using the internet so they could contact people back home, to get to know them and break down some of the barriers.

The project marketed its service widely, but word of mouth continued to be their biggest source of referrals. They knocked on 45,000 doors as part of making people aware of the service and what they had to offer.

They called it Seamless Steps because they wanted it to be seamless for the clients - clients didn't know they were getting something that someone else couldn't. They ran a lot of development projects - ways to engage people, such as things to do with local history or archaeology. Because they were targeting those most marginalised from the labour market, there were a lot of barriers in the way. But the strength of the guidance pilot was that they could employ people who had more time to go through that process with people and to stay with them - it's that long-term support which makes the difference.



Contribution to the targets:

Future Prospects worked with 2,857 clients over the pilot period - they were able to deal with so many, partly because they were able to hit the ground running in many situations, and didn't have to spend time setting up networks and planning. Around 13% were helped into work, and 30% or 40% moved into learning. 129 Mori interviews were carried out, and they follow up clients themselves - they are very proud of their 98% satisfaction rate.

In terms of economic benefits, 70% of the people they worked with were dependent on benefits, and as an average have saved about £3.8 million. They also have strong links with the economic development unit of the local council, and are very aware of jobs coming into York and the skills that might be needed - when a major redundancy happens they are on the spot and can work with new employers, making sure they take York people rather than bring people in from elsewhere.

Key messages:

- **Take an holistic approach to assessing a local community and its needs**
- **Work with the local community and build on your organisation's existing reputation, skills and experience**
- **Be flexible, taking the service to clients**
- **Don't be afraid of innovation - even if it doesn't always work as you imagine, new approaches are always worth a try, and can produce hidden dividends**
- **Build confidence, track outcomes and measure achievement**



What next?

Louise Proctor, Learning & Skills Council

This conference is really timely for the LSC and for IAG partnerships, as we are starting to develop our enhanced services pilots. I am here to look forward to how the views from the conference can help us to plan these services over the next year or so. All of today's presentations, the Marketplace, and the round table discussions, have shown how the pilots have contributed to the widening participation agenda - so key to achieving our targets and enhancing the progression of clients - and of course to achieving the myriad of targets that government set for us.



In this climate it also helps us to make the case for the value that more in-depth services can bring. We have seen that the best model is not always a one-hour interview, and that ongoing relationships between advisers and clients are key, together with a menu of services available over a period of time.

Based on the early findings of the guidance pilots, the LSC was able to decide on the shape of its enhanced services pilots, to be implemented from August. These pilots will be based on a menu of services, offered on a pick and mix basis, to people with below Level 2 qualifications. I am a great advocate of not reinventing the wheel, and ensuring that we do learn lessons and share good practice from projects such as the DfES guidance pilots.

Reflecting on what we have heard today, these are some of the things we should consider when planning our enhanced services:

- **Infrastructure:** *we always underestimate lead-in times, and we have pressures outside our control, but we now have an interim contract period - it can be used to plan to get your infrastructure in place for the enhanced services pilots. In this time you will be planning the services that you will offer and building capacity, and thinking through how those services will be structured.*
- **Networking:** *IAG is well placed in local areas, with an extensive network through the IAG partnerships. But we have heard today that you need to look wider than the obvious organisations, and think about the more specialist services where you can target the groups that we want you to work with.*

■ **Flexibility:** the pilots have found that their delivery models and mix of services needed to be flexible enough to meet a range of individual needs and services. We have tried in our guidance to give you that flexibility in the services that you provide.

■ **Staff competence:** some pilots have had difficulty recruiting appropriately qualified staff, and we need to ensure that the quality of our services is there. We need to invest in our staff and make sure they have access to continuous professional development. The LSC will be supporting staff development nationally, as it has done this year, and our delivery plans will also include activities to support local staff development. The report and CD-rom of the national quality development fund project on staff development are due out in June. The CD-rom will include a training needs analysis process based on the competence requirements of the key roles in the adult IAG sector - outreach, the IAG co-ordinator, the delivery worker, and the LSC IAG contract manager. But often the lack of capacity is linked to the security of contracts. We don't know from one year to the next how much funding we will have. That is likely to continue, but there is a move through Success for All towards three-year funding agreements, which should include IAG from August 2004. I hope that this will go some way towards helping us retain our staff and invest in their training and development.

■ **Marketing and promotion:** although the LSC enhanced services will be a pilot over the next year, for a specific group of clients (while we wait for a national policy framework for IAG and we are sorting out the entitlement to services in the future), it is important that services are promoted to the target groups. The guidance pilots have shown us time and time again how important it is to get the right messages to the right people in a way that they understand.

■ **Follow-up and impact measurement:** the pilots have included following up and measuring the impact of the service as a way of making the case for guidance. With all government-funded work we need to continue to show the added value that IAG brings. But measuring impact also helps you to evaluate how you target your services and monitor the quality of what you do. We require 100% follow-up of enhanced services clients, so we can continue to make the case. We will be evaluating the enhanced services pilots in their entirety. The outcomes of this will help us to further develop services as we implement the requirements of the skills strategy and the national policy framework for IAG.

I hope this event has helped to focus your thoughts on how to take enhanced services forward in your area over the coming year.

