Summary

This report reviews projects undertaken by local Learning and Skills Councils (local LSC's) and partner organisations using funding made available in 2002 from the Quality Development Fund (QDF) for the purpose of raising the quality of information advice and guidance (IAG) provision across England. This document presents case studies describing projects across the country in the areas of widening participation in IAG; developing IAG in the workplace; developing local coherence, consistency and progression in the delivery of IAG; IAG staff development and accreditation; research into the impact of IAG; and developing the use of information and communications technology (ICT).

Executive Summary

This report reviews projects undertaken by local Learning and Skills Councils (local LSCs) and partner organisations using funding made available in 2002 from the Quality Development Fund (QDF) for the purpose of raising the quality of information advice and guidance (IAG) provision across England. The focus of these projects was to increase people's awareness of and participation in IAG services.

The purpose of this report is to: summarise and describe the QDF projects that were delivered by local LSCs; celebrate their achievements and enable others to learn from success through good practice; and draw out the issues and lessons learnt so as to inform the future development of IAG.

The authors of the report supported and monitored the local projects between November 2002 and March 2003. They arranged visits to each local LSC office and discussed each project with the LSC contract manager. In some cases they also met with project managers or coordinators. Once contact had been made, information was exchanged by telephone and email.

This document presents case studies describing projects across the country in six main areas. Widening participation in IAG aimed to increase people's awareness of and participation in IAG services; among the findings was the benefit that would be derived from a clear branding of the service. Developing IAG services in the workplace was a major focus for QDF projects, and the projects described in this report have a number of useful findings regarding IAG organisations' relationships with employers, employees and trade union learning representatives (TULRs). The projects concerned with developing coherence and consistency in the delivery of IAG flagged up the importance of effective collaboration with other learning providers and

support organisations, such as **learndirect**, Jobcentre Plus, Connexions and other members of local IAG partnerships. Developing the use of information and communications technology (ICT) was the focus of a number of projects, some of which described effective systems for collecting and using management information (MI) using streamlined data forms and databases. Research into the impact of IAG with adults indicated the critical role IAG plays in maximising the impact learning has on an individual. Many of the projects involved obtaining feedback from individuals following their use of IAG services, a great many of whom showed a continuing sense of involvement and commitment. Finally, IAG staff development and accreditation projects focused on staff training and development, which were seen as the key to achieving a coherent and professional IAG service, as performance management training can be extremely valuable in reinforcing the need for quality standards.

Overall there was a very strong response to the opportunity to bid for QDF resources. Many local IAG partnerships and local LSCs had ideas or projects that were ready to implement, and the QDF provided the vehicle they had been looking for. Others, spurred on by national developments, took the opportunity to get themselves ready for changes ahead. Most projects had clear and realistic objectives, which helped them achieve successful outcomes. The successful projects all invested time in getting partners fully on board and ensuring that everybody who needed to knew what was being planned. It was particularly noticeable that many of the successful projects were located in local LSC areas where IAG was seen as important and integral to other programmes. There is clearly still work needed to raise the profile of IAG within some local LSCs.

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Foreword

I am delighted to be asked to write the foreword to this report, which celebrates the work of local Learning and Skills Councils and IAG partnerships. The Quality Development Fund was set up in 2002 to provide an opportunity for local areas to try things out, and to innovate and improve the quality of IAG services for adults.

As you will see from these pages, there was a strong response to the challenge from all parts of the country, resulting in valuable experience and high-quality practice from which we can all learn.

Our aim in the Learning and Skills Council is to ensure a high-quality IAG service that is available to all who need it. We see IAG as an integral element of our overall strategy of encouraging lifelong learning and raising the knowledge and skills base of the nation. We will use the lessons learnt through the local Quality Development Fund projects to help shape our strategies and plans both nationally and locally.

My thanks go to local LSCs and their partners for the thought and hard work that went into their projects. I look forward with confidence to the spirit of quality and innovation carrying on as we continue to develop IAG services in the years ahead.

Louise Proctor

Louise Proctor
Programme Manager – IAG

A Report on Local Quality Development Fund Projects 2002/03

Background

1   The Learning and Skills Council (LSC) has responsibility for securing information advice and guidance (IAG) services for adults, and recognises the importance of these services in ensuring that people receive the information they need to make informed choices about education, training and skills development throughout their lives.

2   The availability of high-quality local IAG services for learning and work is key to the success of the LSC's lifelong learning policy. The number of adults involved in learning is set to increase dramatically over the next few years. To make informed choices, people need access to good-quality, comprehensive and impartial information and advice about local learning and work opportunities and their relevance to the labour market.

3   In January 1999, the then Department for Education and Employment (DfEE) launched the Adult Information Advice and Guidance initiative. This established local IAG partnerships to coordinate and improve the information and advice services on learning and work available in England. The aim of the programme was to make sure that free, local information and advice services of a consistent quality were available to all adults in England.

4   Responsibility for IAG transferred to the LSC in April 2001 with the remit that the local LSCs would work with IAG partnerships to develop a strategy that ensured the provision of readily available, impartial and high-quality IAG about learning and work opportunities for all adults over the age of 20 to meet national and local LSC targets.

5   The priorities for the local LSCs were to:

a ensure that nationally set targets for information and advice sessions were achieved by increasing the access to and availability of IAG services;

b meet the IAG needs of clients with qualifications below Level 2;

c measure the impact of all IAG partnership services on clients through effective monitoring and to determine how much difference the service made to individuals in their learning and work plans;

d ensure continuous improvement in the quality of IAG services by:

> training staff from across the IAG partnership network to the appropriate level of competence; and

> maintaining and expanding, where appropriate, the number of organisations accredited to the **matrix** standard for information, advice and guidance services;

e provide a more coherent service for the client by raising the profile of IAG with key stakeholders and partners within the local LSC and across programmes funded by the local LSC; and

f promote the benefits of learning opportunities and encourage the take-up of IAG in the workplace by developing a balance between focusing on the hardest to help and creating strong links with intermediaries of employers and employees, such as Business Link and the trade unions.

6 The Quality Development Fund (QDF) was created for the 2002-03 financial year for the purpose of raising the quality of IAG provision in England. The resources were split between national and local QDF projects. The national QDF projects focused on:

> developing LSC internal coherence;

> developing a national model for staff development;

> developing the employer and trade union agendas;

> developing IT-based management information systems; and

> improving working relationships with key organisations.

Separate reports have been published describing the results of these projects, and they can be found on the LSC website (www.lsc.gov.uk).

7 Local LSCs were invited to bid for funds to run local QDF projects and were encouraged to pick up the themes identified for the national projects. Local LSCs were asked to submit bids for projects during April and May 2002. There

was a strong response and over 90 projects were approved in July 2002. Many local LSCs and IAG partnerships had a number of ideas for development and were able to use the funding to achieve outcomes they had wanted to fund for some time.

8 The local projects focused on the following areas:

> widening participation in IAG;

> developing IAG in the workplace;

> developing coherence and consistency in the delivery of IAG;

> developing the use of ICT;

> research into the impact of IAG; and

> IAG staff development and accreditation.

Purpose of the Report

9 The purpose of this report is to:

> summarise and describe the local QDF projects that were delivered by local LSCs;

> celebrate achievement and enable others to learn from success through good practice; and

> draw out the issues and lessons learnt so as to inform the future development of IAG.

10 This report was compiled between November 2002 and March 2003. Visits were made to each local LSC office involved and the authors discussed each project with the local LSC's contract manager. In some cases they also met with project managers or coordinators. Once contact had been made, information and advice was exchanged by telephone and email.

11 The report has been set out in six sections corresponding to the areas of interest adopted for local QDF projects (see paragraph 8). The case studies themselves are set out as far as possible under standard headings to enable comparisons to be made, and contact information is provided at the end of each case study. The report ends with a glossary of terms used.

12 The authors wish to acknowledge their appreciation of the hospitality and help they received from all the people across the country who assisted with the compilation of this report.

Section 1: Research Summary

Overview

13 Overall, there was a very strong response to the opportunity to bid for QDF resources. Many local IAG partnerships and LSCs had ideas or projects that were ready to implement, and the QDF provided the vehicle they had been looking for. Others, spurred on by national developments, took the opportunity to get themselves ready for changes ahead.

14 Most projects had clear and realistic objectives, which helped them achieve successful outcomes. However, the timing of the bidding process and the approval of projects meant that in many areas, planning and setting-up work was difficult to achieve because it took place in the summer when key people were on holiday. This was generally overcome through the persistence of the project teams. In future it would be sensible to allow a longer lead-in time, with the bidding process taking place well before the funding period.

15 Another consequence of the shortened bidding and planning period was that a few projects cut corners and failed to consult all the key players. In some cases this resulted in projects being abandoned or reduced in scope. The successful projects all invested time in getting partners fully on board and ensuring that everybody who needed to knew what was being planned.

16 Many of the most successful projects were in local LSC areas where IAG was seen as important and as underpinning other programmes. There is clearly still work needed to raise the profile of IAG within some local LSCs.

Key Findings

Widening participation in information advice and guidance

17 The focus of these projects was to increase people's awareness of, and participation in, IAG services. There were projects that developed strategies for marketing IAG and others that focused on targeting priority groups of adults, including people with disabilities, people with basic skills needs, rural communities and areas of social deprivation. The key learning from these projects is described here.

18 There is a need to raise people's awareness of IAG services. Practitioners and customers would benefit from a clear branding of the service.

19 There is scope to try out new approaches in the delivery of IAG that more accurately identify the needs of individual clients, or that target communities and priority groups with specific needs.

20 There are specific training needs for front-line staff working with clients with physical and sensory disabilities. There is also a need for more IAG advisers from communities where English is not the first language.

Developing information advice and guidance in the workplace

21 Developing IAG in the workplace was a major focus for QDF projects, reflecting its status as a national priority. These projects either focused on researching the extent of IAG services already provided in the workplace, or set out to extend provision by targeting local employers and trade unions and setting up specific services on employers' premises. Trade union learning representatives (TULRs) were an important local resource, as were the learning advocates in non-unionised companies. The key learning from these projects was as follows.

22 From the success of these projects, it is clear that employers and employees can be very supportive of IAG and use it as part of their workforce development strategy. However, showing employers the benefits of engaging with IAG was a major challenge. Small- and medium-sized enterprises (SMEs) were particularly difficult to engage with, and were often concerned about the potential for IAG to unsettle their workers.

23 A high degree of flexibility and adjustment was needed to meet employer timescales and cycles. In particular, considerable lead-in time was required when working with employers, and regular communication was needed to progress any follow-up activities.

24 Employers do not recognise the term IAG, so it is important to use the employers' own language, focusing on specific benefits to them. Employer mechanisms for identifying and meeting training needs are understandably prioritised according to business needs. This means that IAG coordinators and advisers need training and development to help them adapt

their skills to the needs of business. Implementation in the workplace requires a different approach from that taken with individual clients.

25   In this respect, successful projects tended to build on long-standing employer contacts. Building up relationships from scratch was expensive in terms of time and staffing.

26   Intermediaries have an important role to play in promoting IAG in the workplace. Work with employers was particularly productive when good joint working existed with Business Link. Relationships with Business Link are currently variable across the country and would possibly benefit from a national strategy.

27   TULRs and non-unionised learning advocates are another point of access with the workplace, and they too have a key role to play. IAG partnerships can facilitate this by training and supporting them, and making sure TULRs and employers have ready access to information through the local IAG helpline or online through the IAG website and **learndirect**. It is always important to talk to both the employer and the trade union partners when introducing companies to IAG services.

28   There are dangers in stimulating more demand for IAG services with employers than the IAG partnership is capable of meeting. Therefore there is a need to plan, prioritise and project-manage. The main operational requirements of the IAG service for employers are up-to-date information, personal contact, knowledgeable advisers and a single point of contact.

29   These projects also highlighted the importance of IAG as an underpinning activity in achieving workforce development targets. It offers an opportunity for local LSCs to model good practice by providing effective IAG to their own employees to support continuous professional development (CPD) strategies and practices. Setting an example in this way builds credibility with employers.

Developing coherence and consistency

30   These projects were working towards developing more effective delivery of IAG across a geographical area. Some were developing new approaches, particularly in the identification of need and the effective signposting of services to clients. Others were focusing on the need to agree common standards of delivery between

IAG partners across an area. This was especially relevant to those local LSCs where a number of IAG partnerships were being merged to form a single partnership. Establishing continuous improvement processes and promoting the **matrix** Standard for information advice and guidance (the **matrix** Standard) were common to a number of these projects. The key learning from these projects was as follows.

31   Networking opportunities between IAG providers are essential to promote good practice. It helps when people are able to voice their fears openly, and networking events in particular are helpful in allowing this to happen. A good deal of IAG activity happens in isolation and is not captured or planned coherently. The IAG partnerships have a key role to play in developing, supporting and creating sustainability in these networking activities.

32   **learndirect** is a key player in promoting IAG. Some local IAG providers have found developing communications with **learndirect** about client referrals difficult to achieve. Clients would benefit from closer working between **learndirect** and local providers.

33   Successful IAG partnerships invest significant time in the continual updating of information through IAG websites, newsletters, network meetings and mailings to ensure information and advice is current.

34   Effective IAG partnerships have a local protocol detailing referral and communication processes in order to ensure that all IAG partners and local providers agree a way of working collaboratively. Provision is collated and housed in a format that is accessible to IAG partnerships and their member organisations. Use of a central database or website allows effective referrals to be made.

35   Effective IAG providers are also making good use of training courses run by IAG partnerships.

36   IAG partners need to have full confidence in the quality monitoring processes before they will buy into them. Time needs to be spent building this. The **matrix** Standard is one example of an important and powerful tool for developing coherence and consistency in IAG services. Maintaining the **matrix** Standard requires organisations to have quality control systems in place.

Developing the use of information and communications technology

37 Developing the effective use of ICT in the planning and delivery of IAG was the focus of these projects. Some concentrated on the collection and use of management information (MI), while other projects developed computer-based approaches to the delivery of IAG services to clients. The key learning from these projects was as follows.

38 A number of the projects developed effective processes for collecting and using MI using streamlined data forms and databases. Other areas will be able to replicate these without repeating the research, although not all IAG providers will have up-to-date or compatible computer equipment or suitably trained staff to allow them to do this. This will therefore be an ongoing development need.

39 Key to data input is the development of a common, easy-to-use form that can be used by all IAG providers. One solution proposed here is an amended version of the European Social Fund (ESF) short event record, to which a second page is added in order to collect the information needed by the LSC and the IAG partnership. The adapted form meets the information requirements of all the current IAG funding regimes.

40 IAG partners appreciate the production of MI reports generated from the statistical returns they send in. It gives the collection of data an immediate purpose and benefit when they can use this information to inform their own planning. The data can only be useful, however, if there is a fail-safe system to ensure that all the mandatory data fields have been completed.

41 A number of local areas have developed websites that contain local information and that point practitioners and clients towards other relevant sites. However, it is important to plan and resource the regular updating of websites if the information is to remain relevant.

Research into the impact of information advice and guidance with adults

42 An important challenge for all IAG providers is to be able to demonstrate the effectiveness and impact of the services they provide. These projects set out to develop methods of evaluating IAG services and to demonstrate the benefits to clients. The key learning from these projects was as follows.

43 IAG plays a critical role in maximising the impact learning has on an individual at all stages of the learning journey. At entry, effective IAG services widen participation and assist individuals in making the most appropriate and informed choices in developing their future careers, therefore increasing retention and achievement rates. Continued IAG support during a learning event enhances these benefits, but also tackles issues of additional support or cases in which a client needs to change their learning pattern or subject. IAG interventions at the end of a programme will support and foster further progression and help to embed lifelong learning.

44 For short-term evaluation, the use of questionnaires during contact with clients successfully generated information about the impact of IAG services. Clients were positive about filling in the forms and cooperated with the research process. It was noted that IAG staff needed to organise their client sessions and interviews to enable clients to have time to complete the research questionnaires.

45 It was a challenge to obtain a representative sample of clients, and more thought needs to be given to ways of identifying and involving clients with basic skills needs.

46 For longer-term evaluation, there was a poor response rate to email and postal surveys. However, it was possible to achieve a high response rate (92%) using a telephone survey. Many of the clients that were contacted were eager to talk, with some asking for further help.

47 Case studies are useful for illustrating the range of typical client experience and the value attributed to confidence-building, help with interview techniques and writing curricula vitae (CVs), psychometric testing, and the value of voluntary work and work experience as a route back to work and personal fulfilment. The case studies also illustrate that people's circumstances change and this may prevent them from realising their goals.

48 Personal circumstances and health combine to form major barriers to moving on into learning and work. Lack of confidence is highly significant, as are finance, childcare, age and lack of relevant skills.

49 Responses showed that elements of the guidance process had given clients more confidence to enrol on courses, apply for jobs or start a business. In particular, the preparation of a curriculum vitae (CV), advice and support, and reinforcement of capabilities were cited as being most valued.

Developing information advice and guidance staff

50 For many clients, their experience of IAG services is dependent on the skills and knowledge of IAG staff. These projects focused on staff training and development, which was seen as the key to achieving a competent and effective IAG service. Most projects focused on the development of front-line staff, although a few set out to develop the leadership skills of managers. The key learning from these projects was as follows.

51 Staff development projects were particularly effective where the principles of good development were being modelled within the local LSC, and IAG advisers and coordinators were applying up-to-date development tools for their own progression. This increased the effectiveness of the tools with clients and employers alike.

52 Some of the projects highlighted the need for a national career structure that would reflect the developing blend of IAG skill sets and the need to seek effective ways to share innovation and up-to-date learning. A national approach could perhaps include an innovation forum to maintain the momentum of development and innovation.

53 In most areas of the country, IAG providers are experiencing skill shortages. Offering access to work taster-days, placements and paid training widens the potential pool of IAG staff.

54 Fast-track programmes can be very successful in raising awareness of IAG services and the potential benefits they can provide for individuals and employers. Peer evaluation and feedback have also been used effectively as an additional means of helping IAG staff plan and manage the pace and nature of their CPD.

55 It is possible to develop cost-effective, flexible and cooperative development programmes within IAG partnerships that increase staff participation in training. However, it is important to ensure that the quality of courses is monitored and action is taken to maintain standards. One satisfactory means of achieving this is to ensure that training and development are part of a performance management process. Performance management training can be very valuable in reinforcing the need for quality standards.

56 There is still work needed to refine the national occupational standards for IAG and to consider how areas such as promoting learning and outreach work can be developed.

57 There are barriers to training trade union learning representatives (TULRs) because of the difficulty they find in getting time off to attend. There may be a need to build training into employer or trade union agreements and to develop distance learning support packs for TULRs.

Section 2: Widening Participation in Information Advice and Guidance

Case Study 1: Derbyshire: Transition Support for People with Disabilities

Purpose and benefits

58 This project aimed to identify more accurately the support required for younger people with disabilities as they transfer from Connexions to other agencies at the age of 20 onwards. Members of this group have very diverse requirements and this project was to clarify appropriate approaches to cater for such diversity.

Outcomes

59 The outcomes of the project were:

> high-quality information collected about the IAG needs of younger disabled people of 20 years and over;

> involvement and consultation with younger disabled people, their parents, carers, work providers and the identification of patterns of support required;

> identification of how better to use or enhance IAG provision for this group in relation to information resources, IAG partner services, training and staff development, and support networks; and

> a report outlining future operational plans that embeds the findings of the research.

Method of delivery

60 The IAG partnership team worked with the Connexions management team, key partners and young people. A conference that had already been planned, which pulled together Connexions and Jobcentre Plus staff, was used to help create clarity about what was being provided and the referrals process.

Issues and learning

61 Quite a complex picture developed about the needs of this group and how provision may need to be differentiated. Several other factors, such as the provision of enhanced services, have a bearing on the scope of what is possible from this work.

Evaluation

62 Some of the information gleaned was used within the business planning process for the financial year 2003-04.

Dissemination

63 The project report was circulated to interested parties in March 2003.

64 A copy of the project report can be found on the LSC Derbyshire website, accessible by following the links from 'Local View' on the national LSC site at www.lsc.gov.uk.

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Case Study 2: Derbyshire: Enhanced Marketing for People with Disabilities

Purpose and benefits

65 This project aimed to create a directory of up-to-date information about IAG services for the priority group of people with disabilities, both for those seeking work and those who develop a disability whilst at work. The benefits of this have been to involve people with disabilities in choosing the most appropriate ways to increase marketing of IAG services to people with disabilities in order to maximise the spread of good-quality information.

Outcomes

66 The outcomes of the project were:

> a compilation of skills training, work opportunities, support schemes and services run by agencies which offer support related to work and learning for people with disabilities; and

> a directory of services, in a variety of formats, to cater for disabled people, people with learning disabilities, people with mental health needs, and people with sensory impairments.

Method of delivery

67 A marketing consultant who has close links with people with hearing impairments and other disabilities was contracted to develop innovative methods of marketing information to this priority group.

Issues and learning

68 It took much longer than envisaged to get everyone who needed to be involved fully informed and in agreement about the proposed methods. It is useful to be able to use links with local partners who are close to priority groups.

Evaluation

69 Priority group service users were asked for feedback about the directory and its usefulness. This is to be done in 2003-04.

Dissemination

70 The report was disseminated with the local IAG partnership and shared appropriately through national IAG channels.

71 A copy of the project report can be found on the LSC Derbyshire website, accessible by following the links from 'Local View' on the national LSC site at www.lsc.gov.uk.

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Case Study 3: Hereford and Worcester: Raising Public Awareness

Purpose and benefits

72   Hereford and Worcester's project was designed to raise public awareness of IAG and lead to more active use of IAG services. It involved an intensive three-month publicity campaign using buses across the region and it targeted rural areas of the sub-region through the establishment of information points in rural pubs and other social areas.

73   The project:

> worked with a range of organisations including voluntary and community sectors, employers, trade unions and **learndirect**, to provide more accessible good-quality information points in social clubs for those in employment and their families;

> developed and implemented a marketing strategy to raise awareness of the service in the more rural areas of the sub-region;

> worked closely with the licensing trade to establish information points in rural pubs; and

> ran training sessions with IAG staff from Jobcentre Plus, Business Link, **learndirect** and basic skills practitioners.

Outcomes

74   The outcomes of the project were:

a the establishment of information points in four employment social clubs;

b a three-month promotional campaign across the sub-region using:

> posters on buses, mobile shops and library; and

> beer mats in pubs and clubs;

c the establishment of 10 information points in rural pubs located in areas of deprivation, across the sub-region by March 2003; and

d a strategy to enable IAG partners to meet the increased demand for advisory sessions.

Method of delivery

75   A steering group was set up that included representatives from the IAG partnership, the local LSC, Connexions, voluntary and community organisations, **learndirect**, employers, trade unions and publicans.

76   The local LSC marketing manager was responsible for the marketing and publicity strategy and its implementation. The local LSC also took on responsibility for liasing with employers, social clubs and rural pubs.

77   There were regular progress reports to the IAG management group and the project was an agenda item on practitioner group meetings to review implications for future workloads.

Issues and learning

78   The project found gaining access to small- and medium-sized enterprises (SMEs) particularly challenging and it is acknowledged that good working relationships between IAG partnerships and Business Link advisers are important if progress is to be achieved. The project also highlighted the importance of engaging the internal LSC team to ensure that the IAG agenda is recognised and integral to the wider LSC programme.

79   There were also problems starting the project because the bidding timescale had meant consultation with key partners was limited before the bid was submitted.

80   There was some concern at the outset about whether the IAG partnership had sufficient capacity to meet the potential demand that might be generated by the project.

Evaluation

81   The long-term results of the project will be evaluated through the IAG business planning process.

Dissemination

82   A final project report was published in March 2003. The findings and recommendations were disseminated through a seminar, 'Learning Works', to build capacity through **learndirect**. A half-day seminar to disseminate findings to a wider audience across the West Midlands is planned.

83   A copy of the project report can be found on the LSC Hereford and Worcester website, accessible by following the links from 'Local View' on the national LSC site at www.lsc.gov.uk.

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Case Study 4: Lincolnshire and Rutland: Basic Skills Awareness

Purpose and benefits

84 This project aimed to raise awareness of basic skills provision with potential learners, employers and providers of advice services and learning opportunities. This was to be achieved by developing a database of basic skills tutors, and a database of basic skills and Entry Level learning opportunities and marketing both databases through Connexions Lincolnshire and Rutland and the Lincolnshire and Rutland IAG Partnership website. Capacity has also been increased by delivering basic skills assessment training and the Dyslexia Adult Screening Test (DAST) to staff involved with the delivery of IAG services.

85 The main benefits of this have been to raise awareness of the availability of, and to widen access to, basic skills support in an easily located source. The project has also addressed the issues of increasing the provision of basic skills assessment and dyslexia screening and has increased capacity.

Outcomes

86 The outcomes of the project were:

> a database of basic skills tutors and a separate database of learning opportunities available on the Internet and on compact disk (CD), and through the Connexions and national **learndirect** helpline;

> delivery of the database, along with information about the Small Firm Training Loans, to 200 SMEs;

> 30 IAG partnership staff trained to assess basic skills needs; and

> 10 IAG partnership staff trained to deliver the DAST.

Method of delivery

87 Connexions Lincolnshire and Rutland developed the basic skills tutor database in partnership with the local LSC, and developed the learning opportunities database with the IAG management team using the existing Connexions learning bank as a style model.

88 The identification of SMEs and distribution of the CDs will be in partnership with a division of Connexions Lincolnshire and Rutland.

89 The local LSC ensured the basic skills training was up to standard and the IAG partnership ensured the delivery standard of the DAST training.

Issues and learning

90 The project used an employee of the local LSC who had already worked on a mapping exercise relating to basic skills needs and provision. The local LSC project manager supported Connexions Lincolnshire and Rutland at the start of the project to define what the finished databases would look like. This helped Connexions to be clear about what was required.

91 A potential difficulty was data protection issues. Some providers and tutors were anxious that by divulging information there was a risk of tutors being poached and they were reluctant for individuals to divulge their details. Sensitive communication helped overcome this. However, submissions by tutors have been slow, which has led to more newspaper advertisements being booked.

Evaluation

92 It will take some time before the impact of these products and services can be measured in terms of levels of use and the number of people accessing further services, such as basic skills tuition, as a result of IAG intervention. Early indications suggest that providers such as Jobcentre Plus welcome the addition of dyslexia screening services and have started to make referrals. The IAG partnership discussed the possibility of including basic skills assessment and dyslexia screening in their menu of 'enhanced services' from April 2003 onwards. Organisations in the IAG partnership have requested that the training for both services be extended. This will be included in the training plan for the next IAG contract year, which will run from August 2003.

Dissemination

93 The results of the project are published on the IAG website and made available to the local and national LSC, the East Midlands Development Agency and learning providers, and the TUC, particularly the teams working on Union Learning Fund, Learning Champion and IAG projects.

94 A copy of the project report can be found on the LSC Lincolnshire and Rutland website, accessible by following the links from 'Local View' on the national LSC site at www.lsc.gov.uk.

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Case Study 5: West London: Routes into Skill Development

Purpose and benefits

95 This project aimed to pilot, across six partner agencies, a fast-track approach for screening and assessing targeted adults with literacy, language and numeracy needs in order to widen the scope of referral options for basic skills.

96 The benefits have been that adults who previously may have been missed are now more easily being hooked into basic skills options. This has been achieved through training advisers in the use of the fast-track approach (the Basic Skills Agency (BSA) Fast-Track assessment) and creating clearer information about where to find and access basic skills training. This has raised the profile of basic skills needs, and highlighted the sensitivities needed to deal with them that are required from advisers. From the evaluation of this project the IAG partnership intends to use this approach with all partners. The benefits of a centralised approach are that learners will be assessed once, the IAG partnership will be responsible for managing a realistic waiting list of learners and learners will receive impartial advice about the opportunities in learning, in terms of type, mode, location, timing, and so on.

Outcomes

97 The outcomes of the project were:

> all literacy, language, numeracy and related provision available across west London was mapped as a web link to ensure that IAG advisers had access to learning opportunities;

> 300 adults were screened and given advice about training, learning and employment opportunities;

> 35 key staff from relevant organisations were trained in screening for clients who may have literacy, numeracy or language needs, using the BSA Fast-Track assessment;

> 200 adults were referred from identified agencies for initial assessment;

> 156 adults were placed into appropriate learning provision;

> eight basic skills workshops were held for IAG advisers – at least 75% attendance to upskill advisers in conducting initial assessments of clients; and

> an evaluation produced recommendations for embedding the project across the IAG partnership.

Method of delivery

98 The LSC London West contracted with the local IAG partnerships to deliver the project. Two part-time project coordinators were seconded from the IAG partnerships. IAG partnerships received funding to create links to a website of all literacy, numeracy, language and other related learning opportunities. Six agencies, one from each local authority across west London, were identified as partners. These agencies were selected for their access to the priority groups of parents, refugees and people in low-skilled jobs.

99 Marketing strategies were developed and awareness-raising workshops on literacy, numeracy and language agendas were delivered to identified organisations. The workshops included guidance on screening tools available for detecting literacy, language or numeracy needs.

100 Support was provided for the agencies involved to become either associate or full IAG partners. All details of literacy, numeracy, language and related provision (such as family learning programmes) available in west London were mapped and the capacity of each provider was identified. This information was used to create a link to the two existing IAG websites.

101 Half-day workshops for all IAG advisers were held on administering the new BSA initial assessment tool. Procedures and systems were developed for screening, advice (on mainstream funding) and referral for basic skills initial assessment. Procedures for the follow-up of clients and an evaluation framework were developed.

Issues and learning

102 The process used raised the profile of basic skills clients and it highlighted the difficulty that providers have in finding suitable methods for disseminating information about their provision. For many clients within areas of west London, English is not yet a language they speak or at best is a second or third language, and there are too few advisers with a command of the breadth of languages from the client group. This makes communication difficult and very time consuming sometimes. It also makes assessment of the level of basic skills difficult to do. The IAG partnership intends to look at this issue in time for development work in 2003/04.

103 The most complex and challenging area to influence was with Jobcentre Plus because of the potential conflict over targets for basic skills. Keeping things simple and practical assisted success.

Evaluation

104 The project had included within it the ability to track the clients who used the fast-track approach. The final evaluation report was available in May 2003.

Dissemination

105 A conference was held with all the key players, including the providers of basic skills provision, to communicate what the project had achieved and the learning it had uncovered. The focus of the conference was to shape how future provision is to be structured as a result of the project.

106 A copy of the project report can be found on the LSC London West website, accessible by following the links from 'Local View' on the national LSC site at www.lsc.gov.uk.

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Case Study 6: North Yorkshire: Marketing Information Advice and Guidance

Purpose and benefits

107 This project aimed to develop a pack of information for the local IAG network to use to promote and publicise IAG across the area. The pack was to include written information, standard slides, a digital video disk (DVD) and a video for IAG staff to use to demonstrate the benefits of IAG. The intended audience included businesses, public agencies and voluntary groups. The purpose of the presentations will be to raise awareness and to increase participation in IAG.

Outcomes

108 The outcomes of the project were:

> a pack of written information that can be used by IAG staff as handouts, and that can be customised for local information;

> a set of slides that can be used to give presentations to a range of audiences;

> a DVD for use especially in outreach venues, including video footage; and

> a video filmed locally that features people who have benefited from IAG.

Method of delivery

109 The local LSC implemented the project through a variation in its existing contract with the main provider of IAG in North Yorkshire. The IAG sub-group of the learning partnerships and the IAG working groups of the North Yorkshire and York Learning Partnerships provided steering and advisory groups for the projects.

110 Planning meetings were held in August 2002 between the local LSC and the contractor to determine the content of the materials and to plan the practicalities of identifying clients who would be willing to participate in the production of the video. The design and content of the written materials was undertaken in-house by the contractor, while video production was contracted out following a competitive tendering exercise.

111 Drafts of the materials were piloted with local groups and within the local LSC in January 2003. The written materials were produced by the beginning of December 2002 and the video produced at the end of January 2003. Every IAG organisation in the North Yorkshire network will receive three copies of the information.

Issues and learning

112 The timing of the project meant that the planning and setting-up work was difficult to achieve because the activity took place in the summer when key people were on holiday. It was also a challenge to identify clients who were suitable and willing to participate. These problems were overcome through the persistence of the project team, who in hindsight would advise avoiding the summer holidays when launching a similar project.

113 Longer term, there will be a need to establish a process for updating the materials so that they remain current and relevant. The local LSC is building this into its local development plan for IAG.

Evaluation

114 The progress of the project and the success of the publicity materials will be the subject of quarterly reports to the North Yorkshire IAG sub-groups of the two learning partnerships that cover the area. Information will be gathered on:

> how clear people receiving presentations are about IAG after the event through evaluation questionnaires;

> the amount of business generated as a result of presentations through clients going to see IAG staff; and

> the impact on referral organisations, which by being more aware of IAG will make more and more relevant referrals.

Dissemination

115 The results of the project will be disseminated through the learning partnerships' newsletter. The finished products were showcased at the North Yorkshire IAG Conference held in February 2003 and publicised through the local IAG newsletter.

116 A copy of the project report can be found on the LSC North Yorkshire website, accessible by following the links from 'Local View' on the national LSC site at www.lsc.gov.uk.

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Case Study 7: Nottinghamshire: Vox Pop Video

Purpose and benefits

117 This project looked to produce a 15-minute video featuring a wide variety of adults who have engaged in learning over the last 12 months and showing what it has done for them. The video focuses upon how the individual enjoyed the activity, and the notion of 'learning' is inherent.

Outcomes

118 The outcomes of the project were:

> a vox pop video was produced, complete with short simple IAG address flyers encouraging adults to send for an information pack;

> 6,000 videos were distributed to community and voluntary groups, job centres, libraries and outreach centres;

> the impact of distributing the video through non-learning venues was piloted; and

> traditional non-learners have enrolled or enquired about learning activities.

Method of delivery

119 A local video production company was contracted to produce the video. The central IAG team coordinated the approach to identifying suitable locations and subject material, liasing with outreach partners to ensure that the video was also distributed in non-learning venues. The team also coordinated the preparation and distribution of the video, flyers and mail-out packs, and collated the MI. A 10% sample follow-up of adults requesting information was performed three weeks after the information mail-out.

Issues and learning

120 The video demonstrates adults gaining self-confidence and developing personally as a result of joining in with learning activities. It is generic enough for any network organisation to use and because it is based upon real examples explained using the recipient's point of view, audiences can relate to it. The video also invades the real or perceived barriers for some adults for whom the benefits of learning activity have not yet been realised.

Evaluation

121 Progress was reported through IAG steering group meetings.

Dissemination

122 Copies of the video were made available to other IAG partnerships and the national LSC in addition to local partners through the local LSC, learning partnerships and strategic bodies, such as the Adult Community Learning Service, the East Midlands Development Agency and the BSA, in March 2003.

123 A copy of the project report can be found on the LSC Nottinghamshire website, accessible by following the links from 'Local View' on the national LSC site at www.lsc.gov.uk.

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Case Study 8: Nottinghamshire: Capacity Building in the Voluntary and Community Sector

Purpose and benefits

124 This project aimed to build up effective collaboration within the voluntary sector and was well received within the sector. The project provided a cascade model of collaborative training ('train the trainer') to the voluntary and community sector, which developed capacity within organisations to assist them in providing information and advice for learning and skills. The benefits have been an increase in access to IAG services in typically hard-to-reach rural areas. As the voluntary services have been trained to help other volunteers to quality assured levels, the range of people likely to use IAG has widened. The potential client gets an enhanced service.

125 A considerable benefit has been that the importance of the voluntary and community sector role in increasing access to IAG has been acknowledged. This recognition provides a tangible outcome in terms of a recognised level of skill through the assured training and a feel-good factor for everyone involved, which in turn has assisted communication and the efficiency of inter-sector working. The project has enabled mutual 'win–win' outcomes – a win for the potential future client; a win for the voluntary sector workers and voluntary organisations; and a win for the IAG service itself.

Outcomes

126 The outcomes of the project were:

> four voluntary sector development agencies trained to support local community groups to provide IAG and basic skills assessment; and

> 30 additional voluntary and community organisations providing IAG services and basic skills assessments.

Method of delivery

127 The project was carried out through the local community and voluntary consortium employing a project worker. They engaged a local consultant to deliver the training in IAG and the BSA Fast-Track assessment. Other aspects included in the training were awareness of the Nottinghamshire Opportunities database and links with the **learndirect** Skills for Life outreach project. They also worked in

partnership with IAG Pathfinder, the Basic Skills Partnership, and Nottingham City and County Council Adult and Community Learning to facilitate networked meetings to share good practice and offer mutual support.

Issues and learning

128 The funding for the training (and associated funding for providing staff cover and care cost arrangements) have enabled the voluntary sector to feel that its role within IAG is being recognised by a government body, and this adds to the feeling of being valued. This has had the effect of acknowledging the importance of the role of the voluntary sector and has assisted everyone involved to get even more delivered to the clients. Success breeds success and attracts more interest and dialogue within and across the sector.

129 It was useful to have a voluntary sector consortium manager already working with the various voluntary organisations.

Evaluation

130 The project officer reported regularly and provided monthly reports to the voluntary organisations consortium manager, who has a coordinating role across the voluntary sector and who is employed by the LSC.

Dissemination

131 A report was presented to the IAG steering group and the LSC at a consortium meeting and all relevant partners attended. The report was also supplied to the National Institute of Adult Continuing Education (NIACE), for circulation to other similar consortia.

132 A copy of the project report can be found on the LSC Nottinghamshire website, accessible by following the links from 'Local View' on the national LSC site at www.lsc.gov.uk.

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Case Study 9: Nottinghamshire: Parents and Information Advice and Guidance

Purpose and benefits

133 This project was to raise awareness of IAG with parents, especially among parents in disadvantaged communities where access to traditional learning has been less popular. The project aimed to hook adults into learning and advice through contact with children in schools. Parents from priority groups such as returners, lone parents, and people who are unemployed or employed in lower-skilled jobs have been targeted in order to capture the whole family into lifelong learning.

134 The benefits have been that it has capitalised upon existing links and resources, and that it has made it easy and less daunting for adults to have contact with IAG. This in turn helped the children of those parents experience the value of lifelong learning for themselves when they are older.

Outcomes

135 The outcomes of the project were:

> the contact and involvement of parents from 100 secondary schools;

> the contact and involvement of parents from 50 non-city primary schools;

> 7,000 information leaflets and reply cards issued to parents through their children from Year 9 at secondary level;

> 1,000 information and reply cards issued to parents through their children at primary school;

> 300 parents returned an enquiry card or phoned the hotline;

> 200 parents were followed up to check the information they had received; and

> 100 parents accessed IAG Pathfinder services.

Method of delivery

136 The project was commissioned to a division of Connexions Nottinghamshire, which worked with existing links throughout schools and the IAG development team. Posters and leaflets were produced with a reply card.

Issues and learning

137 The project has required effective inter-agency partnership working. The reply card included an element of proactivity and engagement.

Evaluation

138 The number of parents taking up advice and the level of activity has been very encouraging.

Dissemination

139 A report was published and circulated to all IAG Pathfinder partners, schools, and the LSC.

140 A copy of the project report can be found on the LSC Nottinghamshire website, accessible by following the links from 'Local View' on the national LSC site at www.lsc.gov.uk.

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Case Study 10: Nottinghamshire: Tracking Users from Priority Groups Leaving Education

Purpose and benefits

141 This project investigated, tracked and monitored people from priority groups (refugees and asylum seekers) who were identified from an IAG service as being appropriate for targeted learning. The aim of this has been to find out their feedback and the impact of the education received, and particularly to understand why some adults have not progressed into learning.

142 One benefit of this has been to feed back to service providers with issues raised from the tracking to assist them in addressing these issues. Another benefit is that awareness of IAG has been raised, with development staff delivering community learning to facilitate referral to IAG where appropriate. Understanding why clients do not proceed with identified learning options has assisted barriers to be minimised and has provided increased evaluation of IAG services.

Outcomes

143 The outcomes of the project were:

> disadvantaged adults were offered on-going support to enable them to remain in learning;

> the factors affecting impact and take-up of IAG are now clearer in this area; and

> there is more effective signposting to IAG support other than learning.

Method of delivery

144 The IAG team worked with four learning providers in Nottinghamshire to examine diversity issues and barriers to learning. The learning providers highlighted adults who had enrolled but not progressed with learning. Contact with the potential learner was made and maintained every two weeks to establish progress and additional support needs.

Issues and learning

145 Complexity in funding bids led one of the learning providers, already in receipt of monies through an ESF co-financing bid, to be unclear about its existing commitment and this caused partial delay. The three other providers were able to start on time.

Evaluation

146 Progress reporting was through the IAG steering group, widening participation group and asylum seekers and refugees groups. Briefing notes were sent to the learning partnership.

Dissemination

147 The details of barriers faced when enabling adults to remain in learning were reported to the LSC.

148 A copy of the project report can be found on the LSC Nottinghamshire website, accessible by following the links from 'Local View' on the national LSC site at www.lsc.gov.uk.

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Case Study 11: Somerset: Marketing Information Advice and Guidance through Leisure Activities

Purpose and benefits

149 The aim of this project was to market IAG to the male population aged over 20 in the county through the use of promotional activities related to, and located at, places that focus on leisure and sporting activities.

Outcomes

150 The outcomes of the project were:

> the identification of partner organisations within Taunton, Bridgwater, Street, Yeovil, Minehead and Frome;

> action research that tested the potential ways of communicating with the client group through their interest groups to raise interest in IAG;

> the trial of different forms of communication in order to promote the Somerset IAG network, in conjunction with partner organisations and its delivery partners; and

> the impact of the methods used to inform future Somerset IAG network activity.

Method of delivery

151 A project worker was appointed and based at Somerset College of Art and Technology.

152 The national census was used for quantitative research into the population profile of Somerset, and parameters were established after reviewing the numbers of clubs and leisure organisations across Somerset. It was decided to try a different type of venue in each town. The selected locations were:

> Bridgwater Rugby Club;

> Frome Leisure Centre;

> Minehead Sport and Fitness Centre;

> Street Wetherspoons Pub;

> Taunton Racecourse; and

> Yeovil Football Club.

153 Each of the events required a different approach. At each event there was a stand staffed by members of the Somerset IAG Partnership, who gave out information on work and learning opportunities, and used professional promotional personnel to provide a conduit to the IAG professionals. At each venue there was a prize draw with a registration form, from which a database was created to enable future contact. The prizes were individually applicable to each location or venue: for example, sports binoculars at the racecourse. Where possible, the latest Audi TT and Jaguar XK8 were also on display and acted as an additional attraction for people to attend the stands.

Issues and learning

154 A longer lead-in time would have allowed for further pre-advertising and the generation of more interest. Although the project was aimed at males aged 20 and above, it is important to have a family approach. The project was well received by the organisations that took part, and further dates were requested.

155 It is important that the impetus created by the project worker should not be lost by IAG partnerships. The project worker felt that the 'Keep it Simple' approach needs implementing, with a more focused approach to information distribution and avoiding clutter.

Evaluation

156 The impact of the project so far has been assessed through the numbers entered on to the database. The total expected audience for the chosen venues was 8,900, therefore with a 20% take-up there was a target of 2,150. The actual database created was 1,266, which represented 14.2% of the total people attending the events.

157 Future impact will be assessed through the number of individuals requesting information from the follow-up contact made by IAG staff through the database.

Dissemination

158 The outcomes are being disseminated through the Somerset IAG Partnership's steering and network groups, a local IAG conference and the Somerset IAG Partnership website.

159 A copy of the project report can be found on the LSC Somerset website, accessible by following the links from 'Local View' on the national LSC site at www.lsc.gov.uk.

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Case Study 12: Somerset: Special Needs Information Points

Purpose and benefits

160 The purpose of this project was to initiate and evaluate the use of six specialist high-quality information points relating to clients with special needs. The focus of the information points were:

> employment;

> mental health and supported employment;

> learning disabilities;

> physical disabilities;

> visual impairment; and

> hearing impairment.

161 The information points were located across the county and housed in organisations that deliver services to clients who have one of the target disabilities.

Outcomes

162 The outcomes of the project were:

> development of an up-to-date and high-quality specialist resource that is available to IAG professionals, network members, TULRs, employers and members of the public;

> links with national and local organisations working in the specific fields of interest;

> a mechanism to ensure automatic updating of continually evolving resources;

> greater awareness by IAG partners of disadvantaged groups locally and issues around equality of access to learning and work;

> recommendations on how to maintain the development of the resource access points;

> a centralised resource database, including the development of CDs and other specific resources for access by target groups; and

> a project report.

Method of delivery

163 A specialist project worker was employed to identify six organisations willing to host the information points and work with individuals within the organisations to develop the information resources using their understanding of the target areas.

164 The organisations participating in the project were:

> St John's Kitchen – mental health and supported employment;

> West Somerset Disability Association – physical disabilities;

> Carr-Gomm – learning disabilities;

> Deafhelp – hearing impairment;

> Somerset Association for the Blind – visual impairment; and

> Donyatt Initiative – rural regeneration (community project).

165 These organisations were selected by the use of information from a general questionnaire. A number of organisations were enthusiastic about the project and had in several cases identified a need for a specialist resource. In order to ensure the sustainability and productivity of each host location, a coordinator was identified within each organisation to establish and develop the specialist resource, with the assistance of the Somerset IAG Partnership. This ensured that the knowledge and experience of each target group were being used to their full potential.

166 A computer database was used to operate the specialist information point, with additional computer programs being purchased to ensure optimum accessibility to individuals within each target group. These included the IBM ViaVoice 10 Professional Speech, a Hal screen reader, a 21-inch screen monitor, and a Braille cipher machine. A Minicom was also purchased for Deafhelp. Hard copy materials were supplied following discussions with each host coordinator. A comprehensive re-order list of free titles has also been compiled, which the coordinator can complete and send to the SIGN central resource to arrange delivery. Links have also been established with all the further education (FE) colleges so that their information will remain up to date. The database, and its hard copy equivalent, are tools which will be continually enlarged and the IAG partnership will supply information technology (IT) support in the event of technical problems.

Issues and learning

167 The key learning from this project is to recognise that with a short-term project such as this, unforeseen problems and delays can have a major impact. Initially there were delays in the recruitment of a project worker, which meant a loss of two months from the overall life of the project. Also, the effectiveness of the supply chain can have major implications: delays with fundamental tasks such as the installation of telephone lines and equipment suppliers being delayed adds to the pressure on a limited timeframe.

Evaluation

168 The impact of the project so far has been the reinforcing of the relationship between the central IAG partnership organisation and its members. The special needs information points host organisations experienced an increased feeling of partnership. Future impact will be assessed through close monitoring of the use of the specialist information points by IAG professionals and individuals, to ensure that a greater awareness is raised of the opportunities and provisions for learning and work for disadvantaged groups within Somerset. It is also important that the specialist information points for learning and work should continue to grow and develop.

Dissemination

169 The mechanism for disseminating outcomes has been through:

> the project report;

> IAG partnership newsletter;

> IAG partnership website;

> network meetings;

> a report to be made available at national and local IAG conferences; and

> a workshop at the IAG network annual conference.

170 A copy of the project report can be found on the LSC Somerset website, accessible by following the links from 'Local View' on the national LSC site at www.lsc.gov.uk.

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Case Study 13: Staffordshire: Support for Clients with Physical Disabilities

Purpose and benefits

171 This project created increased capacity in the IAG network to support people with sensory and physical disabilities by creating a more inclusive service. The project has achieved this by understanding more accurately client needs (including barriers to progression), and identifying ways to address the gaps in the service.

172 The benefits of this have been much clearer identification of need, and knowledge about gaps in service provision. This has helped to target specific actions. Organisations already working with the client groups have been encouraged to join the network to increase potential capacity and communication. One sight-impaired member of staff from the Potteries Association for the Blind, which has now joined the IAG network, has commenced studying for the national vocational qualification (NVQ) in Advice and Guidance at Level 3.

Outcomes

173 The outcomes of the project were:

a a report;

b a firm foundation for improving services to people with sensory and physical disabilities, including:

> relevant definitions and statistics;

> gaps in provision of IAG services;

> barriers and clients' needs analysis;

> organisations already working with client groups;

> identification of local funding sources;

> vision; and

> recommendations;

c several organisations working with people with physical and sensory disabilities, mental health and learning disabilities have joined the IAG network;

d five organisations are now promoting IAG services to disabled clients; and

e more than 100 clients were contacted as part of this research, in over 30 organisations.

Method of delivery

174 Two part-time posts were funded and the people for these posts were seconded from organisations within the network that work with people with disabilities. The intention was to appoint individuals who themselves had disabilities. The two people appointed were experienced volunteers at a local voluntary sector organisation in Staffordshire, and the person appointed to work with people with sensory disabilities is well qualified and experienced in working with people who are Deaf or Deaf–Blind.

175 These two people, working with the manager of the voluntary organisation for Deaf people, undertook the development role of researching, networking, developing links with other agencies, and forming on-going partnerships.

176 Disability-awareness tasters were run at each of the three network meetings in February 2003, followed up with disability- and Deaf-awareness workshops for network members as a starting point for acting on the recommendations of the report. Furthermore, the Staffordshire Adult IAG Strategic Group has agreed to provide funding to provide information and advice on learning and work to people with sensory disabilities. Additional funding has also been provided for IT equipment and software, and Internet connectivity.

Issues and learning

177 The key learning from this project was in understanding how to equip those working with people with sensory and physical disabilities. All front-line staff require awareness and understanding of disability- and Deaf-awareness, probably through workshop learning. It would also be beneficial for people to have Signing skills – employers as well as IAG providers. Further funding would be required to achieve this.

178 There is a need for a county-wide disability forum so that the work started in this project can continue. The forum should develop a three-year strategy for the county and make joint applications for funding to ensure that services are comprehensive, coherent and effective.

179 A monitoring system was put in place to assess the provision of IAG services to clients with disabilities and mental ill health problems, initially over a 24-month period.

Evaluation

180 There were relatively few organisations specifically dealing with people with sensory or physical disabilities in the network, and there was not much experience or expertise in this area. The project report has provided a much better understanding of the issues faced by people with physical and sensory disabilities, and has enabled the IAG team to plan a variety of relevant activities for the forthcoming year.

181 The IAG team is now much more aware of the range of organisations in Staffordshire that are working with people with sensory and physical disabilities, and members of the team have forged strong links with some of those organisations, including some who have yet to make a decision about joining the network. Using staff from such organisations to run training sessions is valuable.

Dissemination

182 The outcomes and the evaluation were promoted and shared through the Staffordshire Adult IAG, the West Midlands Regional IAG Coordinators' Network, the local LSC and national LSC, the Department for Education and Skills (DfES), the IAG website, IAG marketing strategy, the Signpost to Success adult centres, Connexions, and special organisations within the client group such as the Deaf Society and the Royal National Institute for the Blind (RNIB).

183 A copy of the project report can be found on the LSC Staffordshire website, accessible by following the links from 'Local View' on the national LSC site at www.lsc.gov.uk.

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Case Study 14: Staffordshire: Working with Prisons and the National Probation Service

Purpose and benefits

184 This project worked in partnership with the National Probation Service (NPS), the Prison Service, and other partners, and has identified the IAG needs (and addressed some gaps) of adult ex-offenders. The three parts of the project have provided a greater understanding of client needs, have identified gaps in provision (including training) and identified ways to address the gaps in service in the form of a proposed strategy and action plan. The activities have also led to a greater take-up of IAG services by ex-offenders in Staffordshire.

Outcomes

185 The outcomes of the project were:

> the creation of a forum of people working with offenders and ex-offenders to pool knowledge and expertise in the deliberation of the issues relevant to the delivery of IAG services to this client group;

> identification of the gaps in service provision and the creation of an action plan that addresses meeting the gaps;

> identification of organisations working within the client group and encouragement to join the IAG network;

> a centre set up within Stafford Prison to deliver IAG services to prisoners with less than three months to serve;

> promotion of, and help with, access to basic skills provision, New Deal, education, training and work;

> coordination of support and referral to home or IAG services;

> identification of funding sources; and

> increase in the number of ex-offenders who have accessed IAG services.

Method of delivery

186 A partnership was established with local agencies that service the ex-offender client group. This partnership was utilised as a review steering group for the project. A part-time post was funded to work in the prison, and two half-time outreach advisers were seconded from the Adult Division within Connexions to work with ex-offenders in the community. The Probation Service Education and Training Unit (PSETU) was funded to set up and manage the forum meetings, and to draw up the final forum report.

187 Activity with this target group included the following:

> support work with offenders in Stafford Prison who are within three months of their release date;

> setting up a Signpost to Success centre with an adviser providing IAG services to aid the effective transition to work, training or learning; and

> work with ex-offenders in the community who come under the remit of the PSETU, to help with the take-up of learning opportunities, and to encourage retention.

188 The third part of this project was to set up an ex-offender forum with representation from the Staffordshire Adult IAG Partnership, Connexions, Jobcentre Plus, the Association of Colleges, the National Association for the Care and Resettlement of Offenders (NACRO), and Business Enterprise Support, to consider a strategy for this target group.

189 Consideration was also given to how service providers need to protect themselves. Recommendations were made for all organisations, including the IAG partnership, to have clear policies and procedures in place for working with ex-offenders. The forum met again in April 2003 to consider the recommendations and to plan action.

Issues and learning

190 Initially the project was delayed because the chosen secondee left just as the project commenced. It was particularly useful to use people who had links with the ex-offender community and support organisations as they were able to coordinate activity more effectively. Experience from the project showed that prisons tend to work in isolation, so networking and communication were vital. Representation on the forum will have to be widened to ensure it is fully representative of all sectors working with this client group.

Evaluation

191 There was an interim progress report in December 2002 that was presented to the prison forum and the IAG partnership. The forum met in April 2003 to discuss the contents of the report and to agree the recommendations for action.

Dissemination

192 The outcomes of the project and the final report are being promoted and shared through the Staffordshire Adult IAG Partnership, the West Midlands Regional IAG Coordinators' Network, the local LSC and national LSC, the NPS, the Prison Service, the DfES, the IAG website, IAG marketing strategy and Connexions Prison Plus.

193 A copy of the project report can be found on the LSC Staffordshire website, accessible by following the links from 'Local View' on the national LSC site at www.lsc.gov.uk.

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Section 3: Developing Information Advice and Guidance Services in the Workplace

Case Study 15: Berkshire: Information and Advice for Employers

Purpose and benefits

194 This project aimed to introduce IAG services to SMEs in Berkshire through the establishment of a new working relationship between the Berkshire IAG Partnership and Berkshire and Wiltshire Business Link.

195 The pilot began to develop an effective partnership with Berkshire and Wiltshire Business Link, which is generating referral of Business Link client companies to the IAG network. Discussions are currently ongoing to clarify and refine this model for the future.

196 The benefits of the project have been:

> the operational relationship between the IAG network and Berkshire and Wiltshire Business Link human resources advisers;

> access to companies through Berkshire and Wiltshire Business Link referrals, mail-shots and telemarketing;

> opportunities for IAG advisers to meet managers and employers face-to-face to discuss their needs;

> relationships with providers through IAG brokerage of training;

> increased IAG capacity

> improvements to the infrastructure of information provision to employers;

> improved credibility locally for the Berkshire IAG Partnership and the LSC, as there have been positive outcomes, particularly in terms of companies engaging in training; and

> redesigned IAG website, including an upgraded local search facility, a dedicated employer section and the **learndirect** portal.

Outcomes

197 The outcomes of the project were:

> 27 companies became available to the project, mainly through promotional activity, with one company coming direct to the IAG partnership;

> 22 introductory meetings with companies that involved IAG staff;

> training in place for five companies, benefiting approximately 75 employees, and a sixth was introduced to an appropriate provider;

> advice given to eight companies, including one-to-one sessions with employees in one company. Written proposals for development work were submitted to two companies, but not taken up;

> 22 advisers were trained in the use of Myers Briggs Type Indicator;

> the Myers Briggs Type Indicator used with two companies with a total of 23 employees as part of training or development work; and

> two referrals to a local provider.

Method of delivery

198 Berkshire and Wiltshire Business Link and the Berkshire IAG Partnership worked together to engage in workforce development with SMEs in Berkshire. Business Link human resources and customer information advisers identified the need and brokered IAG consultancy on behalf of the employer.

199 Training for Business Link advisers on IAG services was designed and delivered by a consultant, who until the end of 2002 was also working with Berkshire and Wiltshire Business Link to achieve the **matrix** Standard.

200 The consultancy service comprised:

> audit of training needs;

> employee development advice;

> information and advice on workplace training and learning opportunities;

> brokerage service with local providers; and

> financial incentives to help investment in training.

Issues and learning

201 There was a considerable learning curve for all involved. 'Selling' the benefits of engaging with IAG became an issue, and a high degree of flexibility was needed to meet employer timescales. The inclusion of a dedicated project manager meant that all companies were responded to quickly and follow-up work was turned around within five days. However, considerable lead-in time is required when working with employers, and regular communication is needed to progress any follow-up activity.

202 Bespoke training for IAG coordinators and partners was put in place to help them re-focus existing skills to the needs of business, and to develop new skills, boundaries and mindsets to working with IAG within different contexts.

203 The work with Business Link opened up useful debate about the **matrix** Standard and how it maps to other quality standards. It also enabled very useful dialogue about the role of Business Link with IAG and the link to basic skills development. The opportunity to develop IAG partners was very well received as it modelled IAG usefulness with workforce development and also had a positive spin-off for the IAG partnership staff involved.

204 The success of the project enabled productive discussions about how to obtain funding to sustain the work.

Evaluation

205 The project manager reported quarterly to the LSC. The final report was available in April 2003. Evaluation took place with a selection of participating companies and with coordinators and partners trained during the project.

Dissemination

206 An interim report to the IAG partnership management group, coordinators and Business Link was issued in January 2003, outlining an overview of the achievements. Subsequently a de-brief and training session took place in April 2003 to look at issues from the pilot and how Business Link and the IAG partnership can move forward in this area.

207 IAG newsletters in February 2003 and May 2003 highlighting this QDF project were sent to all partners and participating businesses.

208 A copy of the project report can be found on the LSC Berkshire website, accessible by following the links from 'Local View' on the national LSC site at www.lsc.gov.uk.

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Case Study 16: Cambridgeshire: Learning Partners in Trade Unions

Purpose and benefits

209 This project brought together 86 trade unions, trade union learning representatives (TULRs), employers, providers, local LSCs, and members of the IAG partnerships across East Anglia at a major regional conference to share good practice and forge even stronger connections and joint working.

210 Regionally, the LSCs through their workforce development teams and the local IAG partnerships seek to work with the local trade unions. The TUC has been increasing the number of TULRs in East Anglia. This project provided an opportunity to bring a number of local initiatives and strands together.

Outcomes

211 The outcomes of the project were:

> regional conference in March 2003:

> activity in each of the six counties in the Eastern Region for bringing IAG services to employed people through trade unions, and especially their TULRs;

> LSC, IAG partnerships, trade unions, employers and providers enabled to exchange experiences;

> opportunities for joint training, resource development and delivery explored;

> TULR forums developed, involving two trade unions representing 6,000 employees. This will continue to be facilitated and led by the IAG partnership in Cambridgeshire with the aim of increasing the number of trade unions represented;

> regional IAG partnerships have agreed to work together to produce an action plan to take the agenda forward within the region; and

> a providers' fair will be hosted for all TULRs, trade unions and employers at the next trade union event.

Method of delivery

212 The local IAG partnerships delivered this project. The autumn was used to build up the expectation of key players for the conference in March 2003.

Issues and learning

213 This project was about making links and made the most of the many connections already in existence. It was important therefore to persuade key regional and national leaders and opinion-formers to participate in the conference in order to achieve a sufficient impact. Choosing the timing was also important to avoid 'conference overload'.

Evaluation

214 The measure of success will be the degree to which people feel, some time after the event, that they were able to make links at the conference and that there is evidence of activity occurring as a result of those links. The contract review process and IAG partnership management board meetings will seek to collect this evidence.

Dissemination

215 A report was produced outlining the conference and its activity, which was distributed to the local LSCs, the TUC, IAG partnerships and all their members and contacts. The conference itself had media coverage, including the local press.

216 A copy of the project report can be found on the LSC Cambridgeshire website, accessible by following the links from 'Local View' on the national LSC site at www.lsc.gov.uk.

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Case Study 17: Cumbria: Advocate Systems in Non-union Companies

Purpose and benefits

217 This project used the good practice currently being implemented by the TUC learning services. It extended and widened participation in learning across Cumbria through developing TULRs and (in non-trade union organisations), learning advocates who encourage new and returning learners and promote learning and skills development.

218 Cumbria was involved in the national employer pilot and had been instrumental in encouraging the take-up of learning through a Local Initiative Fund (LIF) project to coordinate Adult Learners' Week and promote the benefits of learning to adults.

219 The project worked closely with TUC project workers and the local LSC's workforce development team and the Small Business Service in developing workforce learning through encouraging trade unions and employers to join Cumbria's New Frontiers Partnership and achieve the **matrix** Standard.

220 Non-unionised employers were encouraged to work together to develop a successful model to establish learning advocates who are equipped to work in a similar role to that of TULRs.

Outcomes

221 The outcomes of the project were:

> increased membership and commitment by trade unions and employers;

> recruitment and training of learning advocates (12 learning advocates were recruited and trained from local companies);

> increased delivery of IAG within the workplace and to those not normally accessing these services;

> an increase in achievement of the **matrix** Standard by employers and trade unions;

> stronger links with the TUC; and

> the development of a successful model for establishing learning advocates in non-unionised workplaces.

Method of delivery

222 A project worker was employed to work with TUC project workers and the local LSC's workforce development team to encourage potential partners to join the IAG partnership and to devise a model for learning advocates.

223 The project worker organised tailor-made events targeting employers and trade unions about the benefits of learning and increasing the skills (including basic skills) of the workforce by recruiting TULRs or advocates. The project worker also organised a training programme for learning advocates. This was a five-week Open College Network (OCN) accredited course.

Issues and learning

224 It was learned that making contact with companies is difficult and can be assisted by the effective use of intermediaries such as the local LSC's workforce development team and Business Link advisers. In addition, the term 'learning advocate' was coined to avoid confusion with the TUC's TULRs programme.

Evaluation

225 Future impact will be assessed through the IAG business planning process.

Dissemination

226 The project report has been circulated to the steering group, IAG coordinators, LSC contract managers and other staff, the DfES, the TUC, the Guidance Council, the Guidance Accreditation Board and other interested parties.

227 A copy of the project report can be found on the LSC Cumbria website, accessible by following the links from 'Local View' on the national LSC site at www.lsc.gov.uk.

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Case Study 18: Cumbria: Mentoring Support System

Purpose and benefits

228 This project aimed to increase participation by employers and trade unions in the development of an IAG partnership mentoring support system. The project set up an infrastructure to support partners to enable participants to reach and sustain the **matrix** Standard. The model would be evaluated against the experience of delivering the national employer pilot.

229 The New Frontiers Partnership in Cumbria had been successful in building a strong and effective IAG partnership. All full members assessed against the National Quality Standards for Learning and Work (NQSLW) had achieved Guidance Accreditation Board (GAB) accreditation, maintaining a 100% track record. This had been due largely to the IAG partnership recognising the need adequately to resource quality development and the recruitment of a quality and training coordinator in July 2001.

230 This project was part of a drive to support existing partners to switch over to the **matrix** Standard, to enable newly recruited partners to achieve the **matrix** Standard, but focusing primarily on employers and trade unions.

231 The additional funding was used to engage advisers to the **matrix** Standard to act as consultants and support partners and to develop a mentoring system. This would involve strengthening partnership working and improving working arrangements between key full partners such as Connexions, **learndirect** centres, Jobcentre Plus, voluntary and community partners and other learning providers.

Outcomes

232 The outcomes of the project were:

> 100% achievement of the **matrix** Standard by Cumbria IAG Partnership in March 2003;

> the development of an infrastructure to support partners to sustain the **matrix** Standard;

> increased participation by employers and trade unions; and

> the development of a partnership mentoring system with more staff trained in mentoring skills.

Method of delivery

233 The project was managed by an IAG partnership quality and training coordinator, who commissioned approved advisers to the **matrix** Standard to develop the mentoring infrastructure and work with partner organisations. A series of workshops was also held with partner organisations.

234 Partner organisations paired up to provide support to each other in reaching and maintaining the **matrix** Standard. Managers from one organisation mentored and supported staff from a partner organisation.

235 The mentoring training course was attended by 12 members of staff in order to increase the number of people in the IAG partnership with mentoring skills.

Issues and learning

236 The project has resulted in:

> a clearer focus throughout the IAG partnership on continuous quality improvement;

> improved collaborative working between agencies;

> more partners achieving an understanding of mentoring; and

> an accelerated uptake of the **matrix** Standard.

Evaluation

237 The long-term impact of the project will be assessed through the IAG business planning process.

Dissemination

238 The project report has been distributed to the steering group, IAG coordinators, quality coordinators, LSC contract managers and other staff, the DfES, the Guidance Council, GAB, and other interested parties.

239 A copy of the project report can be found on the LSC Cumbria website, accessible by following the links from 'Local View' on the national LSC site at www.lsc.gov.uk.

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Case Study 19: Devon and Cornwall: Supported Information Access Points

Purpose and benefits

240 The aim was to establish supported information access points in collaboration with TULRs, with 12 employers in Devon and Cornwall, including two mobile units to deal with redundancy counselling and promotional events. The work included basic skills assessment and support as part of an outreach package.

241 The project built on the work already taking place to develop IAG services with employers and set out to engage an additional 500 people in employment through outreach.

242 The role of TULRs was strengthened during the project, with the objective of equipping them to deliver supported information access points.

Outcomes

243 The outcomes of the project were:

> supported information access points were established with 12 employers;

> mobile information access points used for redundancy counselling sessions at six companies;

> 580 advice sessions and 1,209 information sessions were delivered;

> 114 people who had a desire to improve their skills to NVQ at Level 2 or Level 3 or above were identified;

> 69 people who had basic literacy and numeracy needs were supported; and

> an evaluation report was prepared.

Method of delivery

244 The project was contracted to Connexions Cornwall and Devon, the lead partner of the Cornwall and Devon IAG Partnership. The IAG partnership manager had overall responsibility for the project, and provided termly progress reports to the IAG strategic development group, with the day-to-day responsibility being led by a project coordinator.

245 Four workforce development advisers (WDAs) were employed, covering the four areas of Cornwall, Plymouth, South Devon including Torbay, and the remainder of Devon including Exeter.

246 There was a regular outreach service at each point for updating and advice appointments or group-work sessions. A freephone enquiry line for support at other times was publicised. The project focused on major employers and worked in collaboration with TULRs, workplace **learndirect** centres, and other IAG partners.

247 The project also had the potential to offer basic skills assessment and support as part of the outreach package, although to date this has not proved necessary.

Issues and learning

248 The key issues to emerge from this project were:

> training and support of TULRs is key to the development of IAG in the workplace;

> TULRs need access to quick and easy information through the local IAG helpline or the IAG website and **learndirect**;

> access to companies was not difficult, although if a company has no TULRs, it becomes more important to sell the benefits of IAG;

> the effectiveness of IAG services is reduced if there are no learning 'champions' in place to help promote it, and the company should be encouraged to try and identify suitable individuals for this role;

> it is always important to discuss the introduction of IAG services with both the employer and the trade union; and

> there are dangers in stimulating more demand for IAG services with employers than the IAG partnership is capable of meeting. There is a need to plan and prioritise to avoid this.

Evaluation

249 The impact of the project so far has been seen in a number of different areas.

> Support for TULRs has helped them to become more effective in their role to deal with a number of information and advice enquiries without referral.

> TULRs are now about to be recruited and trained (by the Devon and Cornwall IAG Partnership) in non-trade union companies.

> IAG is now being seen as a benefit to both employees and their families.

> More employees are now engaged in learning.

> Employees have received valuable advice and guidance when this has been most critically needed.

> Employees have valued the independent advice on offer in preference to that available from their own personnel department, when facing a life change.

> Many employees expressed an interest in gaining an NVQ at Level 2 or Level 3 that related to their job.

> There are a number of supported information access points already established and there is demand for more in the future.

250 Future impact will be assessed through some fairly basic indicators such as:

> the number of supported information access points already established that continue to receive regular support;

> the number of new supported information access points;

> the number of advice sessions undertaken at existing supported information access points and whether this figure gradually declines as TULRs become more effective;

> the number of learning representatives who receive either partial or full training from the Devon and Cornwall IAG Partnership; and

> the number of SMEs that are engaged through either the establishment of their own supported information access point or sharing this facility with others.

Dissemination

251 Copies of the project report have been disseminated to IAG partnerships through the local Devon and Cornwall IAG Partnership website and through the six local operational delivery groups that cover the area. The IAG partnership manager has provided feedback on the outcome of the project to the strategic development group.

252 The lessons learnt are being disseminated regionally through the South West IAG forum, which meets termly, which comprises the six local LSCs from the south-west area, as well as the IAG partnership managers.

253 Nationally the evaluation report is available on the Devon and Cornwall IAG Partnership website (www.go4lw.co.uk) and hard copies will be disseminated to all 75 IAG partnerships.

254 A copy of the project report can be found on the LSC Devon and Cornwall website, accessible by following the links from 'Local View' on the national LSC site at www.lsc.gov.uk.

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Case Study 20: County Durham: Information Advice and Guidance Provided by Employers

Purpose and benefits

255 The purpose was to map current approaches used by employers for workforce development across the area, to provide examples of good practice, and to identify gaps and training issues for staff delivering IAG within companies.

Outcomes

256 The outcomes of the project were:

> a research paper identifying current approaches used by employers for workforce development;

> local gaps in IAG employer provision identified to help the IAG network plan future interventions and priorities.

> training issues identified for staff delivering IAG within companies, making it possible for the IAG partnerships and the local LSC to plan interventions to develop workforce skills, including encouraging more people to achieve NVQs;

> basic skills educational provision to employees increased; and

> employer workforce development links with the TUC, **learndirect**, HE and Jobcentre Plus mapped, resulting in case studies of good practice for local and national use.

Method of delivery

257 The research took place in February 2003. An overview of previous research was used to gain a perspective on the benefits of IAG access through an employer and the difficulties associated with such support.

258 A sample group of 12 organisations was selected from the private and public sectors. As the research intended to obtain qualitative rather than quantitative data, semi-structured interviews were used. This enabled the researchers to steer the interview to those areas of interest for the IAG partnership whilst allowing the employer the freedom to express their views. Eleven interviews were carried out face-to-face and one by telephone.

Issues and learning

259 The start of the project was delayed because during summer 2002, the Research and Strategic Development Team of the LSC County Durham was already engaged in a major employer survey. It was decided to delay the IAG research until the first survey had been completed. The delay meant that the time for implementing the project was significantly shortened.

260 The main research findings were:

> the employers did not recognise the term IAG;

> employer mechanisms for identifying and meeting training needs tend to be prioritised around business needs;

> while several employers supported personal development, structured in-house IAG is very limited;

> people involved in providing IAG in organisations do not hold specific IAG qualifications. In-house training for this role is also limited;

> the quality and usefulness of the IAG given by employers to their employees is not measured, monitored or evaluated;

> awareness of the IAG network and its services is low, although the IAG service seems to be perceived as valuable to employers; and

> the main operational requirements of the IAG service for employers would be up-to-date information, personal contact, knowledgeable advisers, and a single point of contact.

Evaluation

Defining the service

261 Many employers felt that:

> IAG could be valuable, but they needed to know more before committing to access the network; and

> they were confused about the wide range of organisations involved, and said a single 'brand name' would be preferable.

262 Provision of IAG support to employers needs to be defined properly in 'user-friendly' terms.

Marketing the IAG network

263 The profile of the IAG network needs to be raised with employers, through individual, personal direct contact. To avoid antagonising some of the employers, an awareness-raising campaign is likely to be more effective than marketing IAG services proactively and directly to employees. For example, information such as posters or leaflets could be displayed in communal areas of the workplace and in the community.

264 Partner organisations can assist by carrying the network central access details and a 'brand' punch line that becomes associated with the partnership or network as a whole. Partner organisations need to be more proactive in 'selling' the whole network of services to their client base.

265 Several employers suggested the use of an e-newsletter that could be sent out on a regular basis. This marketing tool would remind and enable those supportive employers to pass on information to their employees whilst also keeping those more reluctant employers up to date. This softer approach might help to remove some of the barriers.

Dissemination

266 The results of the research will be disseminated by the LSC and IAG coordinator regionally. The report summarising research conclusions with case studies has been published and a regional conference was held in March 2003 to disseminate project findings to employers and other interested groups.

267 A copy of the project report can be found on the LSC County Durham website, accessible by following the links from 'Local View' on the national LSC site at www.lsc.gov.uk.

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Case Study 21: Gloucestershire: Enhancing Work with Employers

Purpose and benefits

268 The Gloucestershire project has explored the potential for IAG partnerships to develop better ways of working with employers. This was based on evidence that IAG partnerships, including the local Gloucestershire IAG Partnership, needed to develop more effective links with employers. It was also apparent that IAG partnerships needed to develop ways in which IAG could be provided in the workplace.

269 The project undertook extensive mapping of employer networks with a view to building effective local employer networks and to identify potential companies to take part in the project. This involved the establishment of a resource base in a number of companies. Staff were trained in the use of these resources, and additional training was delivered where appropriate to highlight how IAG interventions can be beneficial.

270 The project objectives and areas for development included:

> working with a range of identified employers to install IAG resources;

> mapping employer networks;

> delivering effective training for the guardians of the resources;

> identifying resources needed to deliver IAG in the workplace (such as software or books);

> identifying training options that could be deployed to facilitate initial IAG delivery in the workplace;

> producing an IAG good practice guide for use by IAG partnership staff in their work with employers; and

> producing a handbook for use by TULRs and associated staff regarding IAG delivery in the workplace.

Outcomes

271 The outcomes of the project were:

> employer networks identified between employers and the IAG network, to be followed up at a later date as part of the new business plan in September 2003;

> IAG resource materials piloted in eight employer organisations, including paper-based and software-based resources;

> an employer handbook for staff delivering IAG in the workplace was produced containing details of links, good practice, initial information, the **matrix** Standard; signposts and contacts;

> an IAG good practice guide for partnership staff was produced; and

> training options for use with employers were identified and piloted.

Method of delivery

272 The project was divided into two phases. Phase 1 was undertaken by a firm of consultants who were employed to map employer networks in the area and to develop contacts and leads to be pursued. Phase 2 was managed by the lead consultant, whose job was to identify and set up in-company resource bases for people to access IAG.

273 The project was delivered through a mix of Gloucestershire IAG Partnership staff time and the consultants. Publications and electronic information were produced by consultants, who worked alongside the Gloucestershire IAG Partnership team and local LSC staff. Training in the provision of initial information and advice was delivered to staff in key companies by the consultants. In addition, bespoke taster sessions were held to raise awareness on the potential of IAG delivery.

274 Resource materials were purchased and piloted in employers' premises, and supported by the Gloucestershire IAG Partnership.

Issues and learning

275 Phase 1 of the project could have been more clearly defined. The result was lists drawn from a desk-top exercise. Personal contacts with key players would have been more useful.

276 Phase 2 was delayed by having to make the personal contacts cold. When working with employers, personal contacts are crucial and they take time to develop. Sensitivity around the use of language and jargon needs to be taken into consideration.

Evaluation

277 The impact of the project is still being measured. Areas of good practice will be identified during the rollover period with a view to forming the key elements of the new business plan for September 2003.

Dissemination

278 The learning and experience gained by this project are being disseminated through:

> local network events;

> regional network events;

> national events (the Guidance Council or national conference);

> newsletters;

> the Gloucestershire Partnership and LSC websites; and

> the South West IAG Partnership and the LSC forum.

279 Copies of the project report and resource materials can be accessed on the Gloucestershire IAG Partnership website (www.go-iag.org.uk).

280 A copy of the project report can be found on the LSC Gloucestershire website, accessible by following the links from 'Local View' on the national LSC site at www.lsc.gov.uk.

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Case Study 22: Hertfordshire: Working with Employers

Purpose and benefits

281 The purpose of the project was to investigate different models of delivering IAG services to Hertfordshire employers and to recommend the most appropriate method(s). The findings would then support the local Hertfordshire IAG partnership in developing its future activities with clients in employment, particularly those who are underachieving in the workplace.

282 The project researched trends and attitudes of local employers in what they want from workforce development and the provision of IAG-type activity, and then identified the most suitable options for delivery in conjunction with Business Link in order to meet employer requirements. This project developed the strategy for working with employers.

Outcomes

283 The outcomes of the project were:

> an assessment of employers' readiness to access IAG and related services for their employees, analysed according to size, sector and location;

> an analysis of the most effective structures for marketing and delivering the service to meet the researched requirements; and

> projected volumes and costings for delivery service over the next three years.

284 As the project evolved, the need for a Hertfordshire IAG strategy became apparent and the original purpose and planned outcomes were revised. It was decided to defer the actual projection of costings to providers, as each would have its own methodology for calculation. Also, the project considered IAG activities in a broader context including commercial services rather than confining itself to the delivery of the IAG contract.

Method of delivery

285 The project was delivered by the Careers Service, which is the IAG lead partner, and which commissioned a market research consultancy to carry out the research, and employed a part-time commercial consultant to follow up some of the findings with individual employers. The market research identified key target market segments for adult IAG services by gender, age group, life stage, ethnicity, socio-economic status, disability, location, employment status, and educational achievement. It also assessed the range of services desired and expected by the target market, including employment and advocacy services and pricing levels.

286 A key feature of the project was a strategic workshop for members of the IAG partnership steering group, facilitated by the consultant. This was the first stage in developing a Hertfordshire IAG strategy, for which further work is envisaged.

Issues and learning

287 One of the key findings of the research was that very few employers valued IAG or IAG providers in isolation. Therefore, any delivery of services would need to be included in a package of other recognised activities such as training or business support. Business Link was identified as an important intermediary for accessing businesses, particularly SMEs. This will be followed up in subsequent Hertfordshire IAG Partnership business plans.

288 It proved to be very useful to use Business Link and its contacts and networks with employers, as it was able to make links to 'warmed-up' employers. This saved time and made discussions more meaningful and productive.

289 The project was useful in indicating areas of difference when providing IAG services to employers. This enabled providers to recognise the need for more flexible or different attitudes, values, skills, and an increased awareness of employer business contexts.

290 It also became apparent that use of appropriate terminology was critical when approaching employers. Focusing on productivity and increased profit margins rather than adult IAG would generate far more positive responses. Similarly, the project reinforced the importance of demonstrating to employers the benefits of providing IAG to their workforce, which in turn

would lead to appropriately skilled staff, increased productivity and profits. It also emerged that businesses needed to recognise the value that effective IAG could bring before they would consider paying for services that IAG partnerships could not provide free of charge.

291 This project also highlighted the importance of IAG as an underpinning activity in achieving workforce development targets. It also offered the opportunity for local LSCs to model good practice, by providing effective IAG to their own employees to support continuous professional development strategies and practices. Setting an example in this way would build more credibility with employers.

Evaluation

292 The outcomes of the project and its contribution to shaping 2003/04 delivery were presented and discussed at the 2002 Hertfordshire IAG Partnership Conference.

Dissemination

293 The project featured at the Hertfordshire IAG Partnership Conference in November 2002. The steering group, contracted providers and the national LSC office received copies of the final report in June 2003.

294 A copy of the project report can be found on the LSC Hertfordshire website, accessible by following the links from 'Local View' on the national LSC site at www.lsc.gov.uk.

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Case Study 23: East London: Employers' Guide to Qualifications and Information Advice and Guidance

Purpose and benefits

295 The main purpose of this project was to develop a new online information resource in the form of specific employers' guides to qualifications, with the emphasis on recent, academic and vocational qualifications. This included a researched and collated resource of links to external sources of remote qualification sites with searchable databases.

296 In addition, a funded project database was established, which would be accessible through the East London IAG Partnership Website (www.iaglondon.org). This development involved expanding website coverage to the whole of east London, extending existing functionality. Additions include:

> an online database of funded projects;

> discussions and resource forums;

> public access IAG client help forums; and

> enhanced information resources for employers and trade unions.

297 The final aspect of the project was to provide a message or discussion forum for IAG clients. Clients would have the opportunity to pose questions, describe special requirements or ask for advice online. The forum would be monitored and contributed to by a nominated group of IAG providers and practitioners to offer online help. This facility already existed on the IAG partnership's website for practitioners; the intention was to extend it for clients.

Outcomes

298 The outcomes of the project were:

> an employer guide to qualifications;

> a database of funded projects; and

> client access to an IAG website across the area.

Method of delivery

299 Consultants were commissioned to undertake the development of the website, with a separate consultancy undertaking the development of the IAG-funded projects databases across the East London IAG Partnership patch.

300 A lifelong learning consultant was commissioned to develop the guide to the qualifications and worked very closely with the consultants developing the database. In addition, a paper-based guide has been developed for distribution across the East London IAG Partnership area.

Issues and learning

301 The delivery of this project took place within the context of the merging of the different IAG partnerships in the east London area.

Evaluation

302 This will take place on completion of the full project. An independent consultant will be commissioned to undertake this evaluation.

Dissemination

303 The outcomes of the project are being disseminated through:

> presentations to local partners and IAG networks and steering groups; and

> a summary of recommendations and follow-up report to be forwarded to the LSC national office, other IAG partnerships, and local LSCs.

304 A copy of the project report can be found on the LSC London East website, accessible by following the links from 'Local View' on the national LSC site at www.lsc.gov.uk.

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Case Study 24: Nottinghamshire: Newsletters to Promote Staff Development and Learning

Purpose and benefits

305 This project engaged the workforce of a local company in the design and production of a newsletter that promoted staff development and learning. The staff involved identified good staff development, communication practices, learning activities and opportunities, and what IAG offers.

306 The benefits were that it promoted staff development in practice within the workplace and highlighted the value of different types of learning and activity that go to make up 'development'. It increased communication within the company chosen and had a direct knock-on effect to make employees feel valued.

Outcomes

307 The outcomes of the project were:

> three newsletters were produced in a year;

> three TULRs were created within the workforce;

> examples of the benefit of lifelong learning were used in the newsletter;

> clear and accurate information was given for learning opportunities; and

> some employees received IAG referrals.

Method of delivery

308 The local Connexions Service undertook the work with a local employer. They worked with the personnel or training manager to recruit a small team from the workforce to produce the newsletter. The trade union was involved and helped create TULRs.

Issues and learning

309 The production of the newsletter was a development activity for the employees, which was well received. Everyone within the company was surprised by how much the newsletter assisted with good communication. The employees kept the newsletter short and full of pictures to catch the eye.

Evaluation

310 An evaluation report was published in March 2003.

Dissemination

311 The newsletter was distributed to all employees in the company. Some of the articles were submitted to the local press. An event was held to highlight the learning points for other employers.

312 A copy of the project report can be found on the LSC Nottinghamshire website, accessible by following the links from 'Local View' on the national LSC site at www.lsc.gov.uk.

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Case Study 25: Nottinghamshire: Videos for Work-based Learning

Purpose and benefits

313 This project developed a 10-minute video aimed at employees to enthuse and encourage them to engage in work-based learning to improve their flexibility and employability. The video was titled 'What Employers Want' and shows good examples of how people can take advantage of work-based learning to further their earning potential and future job prospects.

314 One benefit has been to encourage employees and employers by outlining the possibilities of IAG, along with hard factual information about how to make the most of IAG. The internal LSC workforce development team also found there were benefits to being able to use the video with other employers and employees.

Outcomes

315 The outcomes of the project were:

> a 10-minute video outlining the need for multi-skilled and flexible employees was professionally produced;

> 10 local companies were involved in piloting the video with their workforces to encourage them to take up IAG opportunities and development activities;

> research was carried out with local employers to clarify future skills shortages and how lifelong learning can bridge some of the gaps; and

> some employees were referred to IAG as a result of the video.

Method of delivery

316 The local LSC IAG team undertook the work and linked closely with the workforce development team in order to make contact with local employers. This meant the video used real examples of good practice within local companies.

317 The team linked with TULRs within the companies to integrate the project with any other work-based learning that was ongoing. Employers were contacted, to ascertain the skills gap existing at their particular location.

Issues and learning

318 In order to get access to employers, it was useful to use people with existing effective links; otherwise, it would have taken much longer to get employers interested. Within the contracting process for the video itself, it was important to see and approve the rushes before the video was finalised.

Evaluation

319 The feedback has been positive from the pilot employers.

Dissemination

320 The video was distributed to all 10 companies involved with the pilot, and an employer event was held to highlight the benefits derived by the companies. A final report was presented to the IAG steering group, which was also shared with the trade unions.

321 A copy of the project report can be found on the LSC Nottinghamshire website, accessible by following the links from 'Local View' on the national LSC site at www.lsc.gov.uk.

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Case Study 26: Shropshire: Integrated Information Advice and Guidance for the Public Sector Workplace

Purpose and benefits

322 This project has developed an employer-based IAG delivery model within the health service that could be mainstreamed in the long term and offer an approach for delivering IAG in the public sector. The public sector was chosen to work up this model because it is a high employment sector in Shropshire, and it gives access to a wide range of employees at different skill levels, yet it is often ineligible for external funding.

323 The focus on the health sector resulted from a joint project involving the LSC, the Workforce Development Corporation, **learndirect**, the local IAG partnership, the Department of Health (DoH), the NHS University (NHSU), and staff from the healthcare trusts. The work was undertaken by NIACE, the National Institute of Careers Education and Counselling (NICEC), and the Guidance Council.

324 The model builds on existing IAG-related policies and activity within the health service in Shropshire. It offers scope for contributions both from the IAG partnership and from local providers, but also fits with processes and thinking being developed by the NHSU.

Outcomes

325 The outcomes of the project were:

> a transferable employer-delivered IAG model for all staff in the public health sector that ensures encouragement and empowerment of learners to access independent IAG;

> guidelines for standardisation of IAG best practice across all primary care trusts;

> an IAG model that ensures equality of opportunity, anti-discriminatory practice, and parity of access across the workforce;

> a consistent process to encourage take-up of opportunities to meet national learning targets;

> identification and utilisation of good practice in performance reviewing and individual development planning;

> recommendations for implementation, monitoring, evaluation and impact measures of the model when in practice;

> identification of gaps in access and actions to address these;

> a process to present the model to learners; and

> a dissemination event in February 2003, bringing together all partners to explore future collaboration.

Method of delivery

326 The local LSC was the strategic lead for the project. The key stages were:

> research into current national and local health sector policies and practice;

> research into best practice at a national level;

> identifying the needs and methods required to build capacity for delivering the model;

> exploration of how the model could be developed and supported after the project had finished, including links with the local IAG partnership, the training provider network, **learndirect** and the NHSU to provide sustainability after model development; and

> development of prototype products for management and staff that could be used to publicise, develop, and embed the model.

Issues and learning

327 Ownership by the employer of the workforce development issue was key to the success of this project. This was demonstrated in three main ways: firstly by the Shropshire health service's Workforce Development Corporation being proactive and identifying the need for better information; secondly through support from key HR managers within the Shropshire NHS in providing information and reacting to ideas; and thirdly because developing an appropriate structure for IAG is an early action within the new NHSU.

328 Another factor was to be able to utilise expertise from consultants who – in addition to access to a wide range of national research, networks and information about emerging policy – had some health sector experience. It is vital to have access to people from the sector due to the complexity of such a large employer.

329 The research into learning strategies across healthcare trusts showed an array of management practices, and a spin-off was to be able to highlight consistent practices and expectations for cultural norms as part of the model.

330 Many of the middle managers consulted highlighted how difficult it is for them to keep up to date with knowing about learning opportunities, their relevance and how to access them. The seminar also flagged up some of the blockages in the system and created motivation for participants to overcome them. As a result a further seminar was arranged with learning providers to get the providers and the potential commissioners together.

Evaluation

331 There have been significant benefits from the work achieved in terms of creating effective links and joining up key players. However, actual use of the model will convey the degree of success. Evidence will be sought in 2003/04 for more use of the Workforce Development Corporation's budgets and a corresponding increase in the demand for learning opportunities.

Dissemination

332 A dissemination event was held in March 2003 to share the findings and explore ways of taking the model forward. Subsequently, the model was produced in April 2003, along with a report containing the research and good practice identified in the development of the model.

333 A copy of the project report can be found on the LSC Shropshire website, accessible by following the links from 'Local View' on the national LSC site at www.lsc.gov.uk.

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Case Study 27: Somerset: Delivery through Agricultural and Land-based Sector Organisations

Purpose and benefits

334 In Somerset, agriculture and land-based industries are a major employment sector. The purpose of this project was to research a so-far untapped source of delivery of IAG to the agricultural and land-based sector through their supply chains, and to assess its impact.

Outcomes

335 The outcomes of the project were:

> the involvement of manufacturing companies and agricultural dealerships;

> the identification of Somerset-based purchasers of the equipment or services supplied by the above companies;

> an assessment of the IAG needs of the agriculture and land-based sector organisations as a result of the purchase of goods or services;

> an understanding of how the supply chain organisations deliver IAG on where training can be obtained to ensure appropriate upskilling of employees involved in the use of their equipment or services;

> companies buying into the IAG network by provision of information on where training enquiries can be directed, such as district networks; and

> an evaluation of the level of IAG made available by the organisations in the agriculture and land-based sector through their suppliers to support the training needs of the end user.

Method of delivery

336 A project worker was appointed, employed by and based at Cannington College, a local specialist agricultural college. This person was responsible for carrying out the aims and objectives of the project, and reporting to the IAG partnership's steering group on the outcome.

Issues and learning

337 The project indicated that the local and national agricultural manufacturing and supply companies were enthusiastic about linking with local specialist colleges for IAG and training, but links need to be looked at carefully as there could be a potential problem with neutrality and the endorsement of brands.

338 New high-tech equipment means that comprehensive training will be needed in the future to maximise the full benefits from capital layout.

339 Currently specialist courses offered for operators, by manufacturers, tend to be offered at one level and little assessment made of the individual's needs beforehand. Therefore the training might be at the wrong level, and this may have a negative effect and discourage operators from wishing to train in the future. The researchers felt that there is scope to extend this approach to other employment sectors.

Evaluation

340 The impact of the project so far has been a closer working relationship between the college involved in the research and the manufacturers approached. This has led to a coordinated approach to reach potential learners and purchasers, such as the manufacturers bringing equipment to college open days.

341 Future impact will be assessed through how this initial relationship develops and whether any referrals are made to the college or the IAG partnership for IAG on learning and work.

Dissemination

342 The outcomes are being disseminated through the IAG partnership steering group; the IAG partnership network groups and the website.

343 A copy of the project report can be found on the LSC Somerset website, accessible by following the links from 'Local View' on the national LSC site at www.lsc.gov.uk.

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Case Study 28: Tees Valley: Stimulating Interest in Information Advice and Guidance in the Workforce

Purpose and benefits

344 The aim of this project was to work with employers and the TUC to increase the capacity and quality of IAG in order to stimulate increased levels of workforce development. Specifically, the plan included the following objectives:

> to work with a minimum of 50 companies, offering to train at least one member of staff in each company in the NVQ in Advice and Guidance and in Basic Skills at Level 2 or Level 3. This would give them the ability to identify needs and develop an appropriate individual development plan for the employee;

> to work with the regional TUC to identify 30 new TULRs from a range of trade unions and organisations, training them to identify basic skills needs and develop an appropriate individual development plan for the employee, and offering them training for an NVQ in Advice and Guidance at Level 2 or Level 3;

> to introduce the **matrix** Standard to the workplace; and

> to introduce LSC services to employers and employees and therefore further to integrate workforce development and IAG services. These activities would promote a learning culture, increasing the uptake of qualifications and develop a skilled workforce, leading to increased productivity and the achievement of both local and national targets.

Outcomes

345 The outcomes of the project were:

> 50 TULRs trained;

> 50 TULRs registered with the NVQ in Advice and Guidance at Level 2 or Level 3;

> basic skills awareness training delivered to 50 TULRs;

> 10 organisations working towards the **matrix** Standard;

> 30 employees registered on basic skills courses;

> 50 employees working towards NVQs at Level 2 or Level 3.

> the Modern Apprenticeship programme introduced to 50 companies with 30 additional Modern Apprentices being recruited; and

> a report setting out the details of the project produced.

Method of delivery

346 The starting point for the project was to build on existing knowledge and contracts as well as networks and partnerships that existed in the area through the work of the LSC's workforce development team. The project was led by a member of the workforce development team who identified the organisations to target and engaged them in the project.

347 Targeted companies were invited to a presentation on the project. The presentation was attended by 57 people from 30 organisations, and 17 public and private sector organisations committed to the programme. Subsequently, between October 2002 and March 2003, expressions of interest were followed up, employee details were entered on to a database, and places were allocated. Workforce development advisers added the project to a portfolio of workforce development activity that employers could access.

348 Training programmes in IAG were designed and provided by Hartlepool College. The programme took the form of a two-day compulsory induction course followed by six knowledge and understanding workshops for the NVQ in Advice and Guidance at Level 3, and five knowledge and understanding workshops for the NVQ at Level 2. The course was free to participants and companies contributed the time for people to attend the training. Assessment was through on-site assessment and a 'paperless portfolio' of evidence. Three basic skills awareness sessions were also provided by Stockton Adult Education Service for participating organisations.

Issues and learning

349 It was important to build the promotion of IAG into the LSC's workforce development programme. By building on existing networks and contacts, the project achieved early successes (projects starting from cold will struggle).

350 Firms already committed to Investors in People (IiP) were a fertile ground for developing IAG. In addition, sector groups, such as those in construction, transport, and health and social care, were good routes into developing further contacts with individual companies.

351 The benefits of IAG needed to be sold in business language, avoiding IAG jargon.

352 The commitment of Hartlepool College and its dedicated staff was an important factor in making the courses a success.

Evaluation

353 The impact of the project will be assessed through an in-depth evaluation in autumn 2003 when the project participants will have completed the NVQ.

354 The amount of resources needed to cope with the administration was underestimated. A great deal of time was needed to keep the database up to date with participants' details and amendments.

355 The contract outcomes were not achieved, in spite of strong commitment and enthusiasm. There was a variety of reasons for this, but the most typical was that organisations were already committed to workforce development and had staff training programmes in place, so it was not possible for them to release staff. However, interest in joining future projects was expressed.

356 The NVQ programme is very time-intensive as it requires eight full days plus time in the workplace. This will be reviewed for future delivery as it was suspected that it had a negative effect on organisations' decisions to join the project.

Dissemination

357 Interested parties will participate in appropriate local, regional and national conferences to share the experience and outcomes. It is also planned to make presentations to employment sector groups and the IAG network, seeking their support to adjust and continue the programme of activity.

358 Feedback will be given at a regional workforce development managers' meeting and this will be shared with the national workforce development operations group.

359 A copy of the project report can be found on the LSC Tees Valley website, accessible by following the links from 'Local View' on the national LSC site at www.lsc.gov.uk.

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Case Study 29: Tyne and Wear: Embedding Information Advice and Guidance with Employers and Trade Unions

Purpose and benefits

360 The Tyne and Wear project was set up to work with employers and training providers to identify a successful model that can be used to introduce and support IAG within the workforce. It included effective signposting and referral mechanisms linked to the work of Tyne and Wear Small Business Service, the TULRs and the **matrix** Standard.

Outcomes

361 The outcomes of the project were:

> 19 employers (10 large employers and nine SMEs) agreed to take part in the research phase of the project;

> three models were developed; and

> companies were supplied with marketing information.

Method of delivery

362 The project was organised in five phases. Phase 1 raised awareness of IAG and improved the quality of service by appointing a person to oversee the project; to coordinate actions between the various organisations; and to be responsible for the final report and its dissemination.

363 Phase 2 was research to identify ways in which employers and training providers in Tyne and Wear were providing IAG, and the support they needed in this area; and to develop a model that could be used successfully with a range of organisations.

Model 1: The 'drop in' service model

364 Three companies provided an IAG 'drop-in' service, with sessions taking place on a monthly basis within the company. They were publicised in advance and staffed by an employee from the IAG network.

Model 2: The intranet website model

365 Nine companies provided a link to the IAG network website by way of the internal company intranets, to raise awareness of learning in the workforce.

Model 3: The employer and trade union model

366 One company opted to develop the role of the TULRs. This is similar to the drop-in model except that the strategy was to train the TULRs to run the sessions on an ongoing basis. The IAG partnership project manager ran the initial sessions in the company on a weekly basis and supported the TULRs.

367 Phase 3 was research on employers' premises to develop and trial models of delivery with a variety of local organisations. Phase 4 developed a marketing strategy and identified suitable media for promotion of the service. Finally, phase 5 was devoted to disseminating the model and final report.

Issues and learning

368 Employers lacked knowledge about IAG and the local IAG network support available. They were aware of the need to develop staff but unsure how to access help, information or advice. This meant there was a need for information material for use by employees to raise awareness of opportunities. Referral procedures were needed to allow access to advisers, or to address IT or basic skills needs.

369 Systems were needed to develop to allow employers simple access to information. There was also a need to identify means of supporting TULRs and referral procedures to specialist advisers for advice on the progression of learners.

370 Employer attitudes were crucial in affecting the success or otherwise of the projects. It was comparatively easier to interest larger employers rather than SMEs since small employers saw training and learning as an additional cost they could not afford. Some employers had a fear that developing staff would mean losing them to competitors.

371 There was also some reluctance by Business Link advisers to get involved in the project, which made developing links with employers perhaps more difficult than if there had been a more active partnership.

372 In summary, the learning from operating the three models was as follows.

> Employers need to be convinced of the business benefits of IAG.

> The IAG partnership needs to develop a specific website for employers, which would then lead them to the main IAG website.

> For some employers, the way to raise awareness will be through the use of intermediaries who broker other business benefits for them, and therefore work needs to be done to work more closely with intermediaries, particularly those operating out of Business Link and the TULRs.

> The TULR who worked closely with the project admitted 'hostility' to the project in the early stages, believing that he had the information that he needed through **learndirect**. He came to understand that IAG was a tool that he could use to support people more fully and to offer them a wider range of opportunities.

> The same employer has now seen that training and developing staff does not mean that they will leave. Employees feel more loyalty to a company that offers them development opportunities, and by upskilling staff the company is able to promote from within.

> At another company supported through the project, 25 staff showed interest in undertaking some form of development and four have commenced courses.

Evaluation

373 The project has been successful in identifying means by which IAG can work with employers. It also demonstrated the need to work closely with all other agencies in this field to raise awareness of what IAG has to offer. For example, the project has identified the need for close collaboration between the IAG partnership and the TULRs.

374 IAG needs to be sold as a business benefit if it is to reach a wide audience. The IAG network will continue to develop this work and is giving ongoing support to the participating companies and any others who would like more information.

Dissemination

375 The results of this project are being disseminated through a series of workshop conferences. The project report will be widely disseminated through a variety of media including the workshop, the Internet, and TULRs.

376 A copy of the project report can be found on the LSC Tyne and Wear website, accessible by following the links from 'Local View' on the national LSC site at www.lsc.gov.uk.

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Section 4: Developing Coherence and Consistency

Case Study 30: Coventry and Warwickshire: The Sampson Model

Purpose and benefits

377 This project has successfully used the Sampson model of cognitive information processing (the Sampson model), which was developed at Florida State University. By using the Sampson model, the trial has demonstrated that service users are able to access information more easily and readily and a higher degree of client satisfaction is noted.

378 The Sampson model looks at how people make decisions and solve problems and takes the opportunity to influence the process by providing stimulating resources or reading environments, maximising technology, self-help and quick diagnosis from IAG staff.

379 A welcome spin-off has been the very positive feedback from front-line staff involved with the trial. It has built value and interest and has a mutual feel-good factor for client and provider. Another unplanned benefit was the positive effect that using the Sampson model had with helping transition arrangements for 19–20 year olds.

Outcomes

380 The outcomes of the project were:

> eight venues offering IAG services (Learn and Earn delivery posts) were re-designed using Sampson model principles of light, colour, space utilisation and quick screening;

> 60 front-line staff at these locations were trained in basic screening with great attention to noticing small details for maximum self-help referral; and

> a mobile bus for rural locations has been re-designed to maximise resources to incorporate Sampson model principles.

Method of delivery

381 The delivery method was through collaboration between a consultancy, the Derby University Centre for Guidance Studies and a local company which developed the IT assessment tool to be used as part of the Sampson model.

382 The LSC Coventry and Warwickshire was able to use a secondee from Coventry University who worked along with the project group and the Connexions Service to provide staff training.

383 The Sampson model is based upon cognitive information processing (CIP) theory. This theory relates to the process of career problem-solving and decision-making. It focuses on helping individuals to better understand and manage decision-making about work and learning. It does this by:

> using terminology in resource rooms or libraries that individuals can readily comprehend;

> increasing the amount of 'self-help' by which individuals are able to search for information in resource rooms or libraries on an open access basis but get extra help if they need it;

> the increase in the number of individuals who are able to 'self-help' frees up staff time to serve more individuals;

> increasing access to IT packages and the Internet where there is a wealth of information on learning and work;

> taking account of how people navigate their way through an information search, with the aim of avoiding information overload;

> simplifying the categorisation of information in resource rooms or libraries; and

> increasing staff teamwork with the use of floor walkers to ensure that clients are finding what they need.

Issues and learning

384 Because of the short timescales involved, existing joint delivery points were chosen for the trial. Ideally the project group would have liked to have widened the trial base and included people from different client groups such as church groups, the voluntary sector and colleges.

385 The knowledge of the consultant helped tremendously because of the experience obtained in applying the principles in other settings. At the same time, training for front-line staff required a degree of sensitivity and awareness of the principles of managing change to avoid miscommunication about current practices.

386 One of the venues was a youth service location and there is some useful and productive feedback from a different perspective, which will be fed into the overall evaluation.

Evaluation

387 The Derby University Centre for Guidance Studies (www.derby.ac.uk/cegs) compiled the evaluation report. The draft was presented at the National IAG Conference in Blackpool in February 2003.

Dissemination

388 A copy of the project report can be found on the LSC Coventry and Warwickshire website, accessible by following the links from 'Local View' on the national LSC site at www.lsc.gov.uk.

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Case Study 31: The Black Country: Application of the matrix Standard

Purpose and benefits

389 This project developed a 'mystery shopper' methodology that was related to the new **matrix** Standard, which underpins continuous quality improvement. The four Black Country IAG partnerships were included in the exercise.

390 An audit tool was developed during the project and was shared with the IAG partnerships nationally during April 2003.

Outcomes

391 The outcomes of the project were:

> a mystery shopping audit tool, which can be used by other IAG partnerships;

> robust baseline data, both qualitative and quantitative, demonstrating the delivery achieved against the **matrix** Standard for 149 information and advice providers;

> individual reports for each provider, including recommendations on how to improve service;

> an action list of improvements for the IAG service; and

> the provision of support and consultancy to participating organisations.

Method of delivery

392 The Black Country IAG partnerships and the local LSC obtained a contract to develop a mystery shopper methodology. The mystery shopping requirements of the old standards were mapped against the new **matrix** Standard, and a mystery shopping tool was developed through a mixture of desk research and field study.

393 This audit tool was then applied to existing and new IAG partnership members. A total of 298 mystery shopping expeditions were agreed to in 149 organisations. A principle of three attempts was put in place for shops that proved difficult to access. Each organisation was advised of the mystery shopper exercise, which was carried out during January 2003 and March 2003.

394 Shoppers were recruited who had some interest in IAG services and who were independent of the IAG partnership. In practice there was a need to get a mix of types of shoppers to match the profile of organisations. It was important to construct a scenario around the shoppers' real-life experiences, allowing them to react in a convincing way and to avoid detection. A fixed scenario could also be presented across a number of different organisations, which was useful when considering comparisons between providers.

395 Where the organisations provided both information and advice, both of these services were audited. Group briefings were arranged for the organisations with training sessions on common issues that were highlighted during the process.

396 Informal feedback was given from mystery shoppers to the appropriate IAG coordinator. Formal feedback was through written reports to each organisation and IAG coordinators, along with individual de-briefing sessions on the findings. A summarised report was shared with the LSC and individual IAG partnership steering groups.

Issues and learning

397 The project aimed to realign user feedback to the 10 areas of delivery and management of the **matrix** Standard. However, the way in which the **matrix** Standard was introduced to the IAG partnerships caused some problems: many of the organisations were not happy about its high costs and had to be reassured, which delayed the project. It was clear early on in this project that few providers were working to the new **matrix** Standard; most were still operating under the old. This meant using the feedback as learning for meeting the new **matrix** Standards rather than to check up on providers' delivery.

398 Many of the organisations had to be convinced that the **matrix** standard was really necessary given that some of them had only just received accreditation under the old NQSLW Standard earlier that year. Added to this difficulty was the scarcity of trained assessors for the **matrix** Standard.

399 Communication of the intent and reasons for undertaking the project had to be very clearly made to avoid organisations becoming defensive about suggested improvements. Emphasis was placed upon the need for continuous improvement to sustain growth of IAG services.

400 Detailed information was needed from the providers about their service before the shopping visits took place. This included opening hours, but also whether there were any conditions under which people would be refused the service. However, even this level of knowledge (that a genuine customer would not necessarily have) did not guarantee service delivery.

401 Some organisations proved particularly difficult to access, given the restrictions on those using the service: the local branches of the National Probation Service, for example. There needed to be an allowance in the budget for paying shoppers to revisit organisations where access had proved difficult.

402 The **matrix** Standard is general and does not therefore contain specific areas for examination under mystery shopping. It was therefore necessary to make judgements about areas of service delivery that would be evaluated, and this would be open to interpretation by individual providers and IAG partnerships. Even so, the information gathered about service delivery on the ground was valuable and gave a very real picture about customers' experiences.

403 Very detailed briefings and scenarios had to be given to the shoppers and this will be included in the final toolkit produced from this exercise.

Evaluation

404 The organisational audit reports were reviewed to develop an agreed action plan of service improvements. On-site consultancy to participating organisations was provided in conjunction with IAG coordinators to help them achieve the action points.

Dissemination

405 A mystery shopping audit tool will be disseminated to IAG partnerships and the LSC through the local LSC's website.

406 A copy of the project report can be found on the LSC Black Country website, accessible by following the links from 'Local View' on the national LSC site at www.lsc.gov.uk.

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Case Study 32: Cambridgeshire: Positive Pathways for Young People

Purpose and benefits

407 This project made recommendations about how to improve how young people (at their 20th birthday) are referred from Connexions to other agencies and services in the Cambridgeshire area. The emphasis has been on the relationship with IAG partnerships, Jobcentre Plus and HE, and has highlighted best practice at this transition stage.

408 This project complements a draft consultation report with regard to the role of IAG and Connexions. The activity included:

> researching the viability of operating an adult guidance service within a Connexions company;

> identifying the needs of clients who become 20 and are therefore no longer eligible for the intensive support provided by Connexions;

> investigating the potential capability of the network of agencies across Cambridgeshire and Peterborough working with adults to support clients aged 20 and over;

> working closely with Connexions to plan for smooth transition arrangements for clients leaving the scope of Connexions support; and

> identifying and confirming support mechanisms for adults in FE, now no longer supplied by Connexions.

409 As part of an LSC co-financing ESF contract, further work will be completed to map guidance provision for adults by autumn 2004. The work will also help the LSC rationalise what it supports in terms of guidance for adults when its role in funding guidance becomes clearer following the publication of the Government's Skills Strategy in 2003. It is generally expected that the Skills Strategy will propose a national branding for IAG. Connexions then proposes to make a strategic decision about what branding it should have for its adult guidance service, what relationship this service should have to the IAG partnership, and whether the two organisations should be transferred into their own subsidiary company.

Outcomes

410 The outcomes of the project were:

a Connexions Cambridgeshire and Peterborough has in its business plan 2003/04 an objective aimed at identifying the systems needed to ensure ongoing support for those Connexions clients who need it beyond their 20th birthday;

b local mapping exercises planned to increase awareness among personal advisers of agencies supporting young adults;

c planned training to improve the skills of personal advisers in relation to agreeing exit strategies with their clients;

d identified need to improve links with leaving care teams; and

e monthly strategic meetings between Connexions, the IAG partnership, adult guidance staff and **learndirect**. Examples of joint strategy include:

> shared premises and library resources;

> formal organisational links across 13–19 and adult delivery with the proposal to develop service delivery agreements (with the National Probation Service, for example);

> development of inter-agency referral form to be used with clients aged 19 and over; and

> cross-company staff development.

Method of delivery

411 A project manager was appointed who had:

> formal discussions with Connexions managers about issues facing clients after their 20th birthday;

> involvement with Connexions business planning to identify how the Adult Guidance Service might dovetail with planning of core services for 13–19-year-olds;

> regular strategic discussions with the IAG partnership manager and LSC contract managers;

> meetings with FE establishments to confirm roles and responsibilities in relation to mature students;

> close liaison with Connexions area and team managers to ensure cooperation across the age range where appropriate;

> membership of the Cambridgeshire Learning Partnership Operations Group;

> ongoing dialogue with **learndirect** learning centres; and

> led training of adult advisers to help them work with 20-year-olds.

Issues and learning

412 The project reflected a context of ongoing change, and rather than being undertaken as a stand-alone piece of research it has become an integral part of the adult guidance team manager's overall work, including regular strategic discussions with other Connexions managers and the IAG partnership itself.

413 It was not possible to focus on referral mechanisms so early on in the life of Connexions. Firstly, it was important to identify the overall impact of Connexions, then to identify internal and external issues and finally to start planning referral systems, more realistically for the operational year of 2003/04.

414 The IAG partnership will continue dialogue with FE establishments, and where there is acknowledged lack of guidance provision for adults then funding may be sought to bridge that gap.

415 Currently the IAG partnership and Connexions are in discussion to identify whether it would be possible to send a mail-shot out on an individual's 20th birthday, outlining the services available to them from all IAG providers.

416 Discussion has taken place in the Huntingdon and St Ives area and with the **learndirect** hub to seek to establish a system whereby a young client could access a **learndirect** course if some kind of endorsement were signed by their personal adviser. This could encourage young people to continue learning into adulthood.

Evaluation

417 The project is now a specific agenda item at a number of events, including the IAG regional managers meeting and the Cambridge GET group board meeting.

Dissemination

418 A copy of the project report can be found on the LSC Cambridgeshire website, accessible by following the links from 'Local View' on the national LSC site at www.lsc.gov.uk.

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Case Study 33: Essex: Quality Circles

Purpose and benefits

419 The purpose of this project was to enable IAG providers across Essex to plan, develop and implement a continuous quality improvement methodology. The two aims were firstly to develop those partners that were genuinely keen to develop a continuous quality improvement process and secondly to sell the benefits of continuous quality improvement to those who still perceived it as bureaucracy rather than an effective tool.

420 The project aimed to strengthen the IAG partnership by supporting voluntary and community organisations towards **matrix** accreditation. This would expand the IAG partnership and increase access to high-quality information and advice to adults throughout Essex.

Outcomes

421 The outcomes of the project were:

> an audit and training needs analysis for the 90 organisations that belong to the Essex IAG Partnership; and

> training events for 15 managers and senior staff from member organisations, which will lead to the NVQ in Advice and Guidance at Level 2 or Level 3.

Method of delivery

422 The project was managed and implemented by Essex Careers and Business Partnership Ltd. The project began with a conference for IAG partnership organisations that was addressed by speakers from the Quality Foundation and the GAB. Consultancy was purchased, which undertook an audit and training needs analysis with partner organisations.

423 Training was provided for staff on business planning, delivering advice, evaluation, policies and procedures, and supervision.

Issues and learning

424 The initial conference was important in identifying the barriers and benefits to the continuous quality improvement approach. Communicating the benefits was the key to getting on board those people who claimed they did not have the time to take part in continuous quality improvement activities. The project has stimulated the sharing of good practice across the county and an improvement in IAG paperwork. It has also stimulated the beginning of a 'culture change' towards people talking about quality as a matter of day-to-day business.

Evaluation

425 Future impact will be assessed through the IAG business planning process.

Dissemination

426 The outcomes will be disseminated through LSC bulletins. The IAG partnership manager will share outcomes at the national conference. The message is also to be shared with representative umbrella organisations for the voluntary and community sectors, such as Essex Community Foundation, and local arms of the Council for Voluntary Service (CVS). The object of feeding this through such groups will be to cascade knowledge of the benefits of IAG partnership membership, and experience of the **matrix** standard. This information sharing will ideally lead to the setting-up of self-supporting mentoring groups within the sector to boost interest and take-up of IAG partnership membership and accreditation.

427 A copy of the project report can be found on the LSC Essex website, accessible by following the links from 'Local View' on the national LSC site at www.lsc.gov.uk.

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Case Study 34: Gloucestershire: An Information Advice and Guidance Needs Identification Tool

Purpose and benefits

428 The purpose of this project was to develop an IAG needs identification tool that would enable both practitioners and clients to identify more accurately the service required. The tool would assess IAG needs and signposting, and referral to IAG partnership and non-IAG partnership service delivery agencies, including **learndirect** and agencies that can work with clients who have basic skills needs. To date, experience had shown that IAG partnerships (including the local Gloucestershire IAG Partnership) needed to enhance the signposting or referral mechanisms they use.

429 Of particular concern was the recognition that many clients were inappropriately referred to IAG services. For example, clients were often referred to guidance services when in fact they only required information, and vice versa. This project proposed to develop an accurate IAG identification tool that could be used by front-line staff or other staff making referrals. It was anticipated that such a tool would significantly enhance the referral process and lead to considerable cost savings by ensuring that clients receive the services they need.

430 This tool would also be available electronically to help clients to identify their own needs before self-referring. The electronic tool would automatically signpost to the nearest provider. Staff in all member agencies and a range of non-member agencies would be provided with the tool that would identify their level and type of need. This would be both paper based and electronic.

Outcomes

431 The outcomes of the project were:

> the development of paper-based and electronic IAG needs identification tools;

> production of a 'web companion' (a hard-copy resource guide);

> the tools piloted across IAG partnership agencies with more than 300 clients;

> feedback on tools gathered from all participants (staff and clients); and

> an evaluation report produced with recommendations for future development.

Method of delivery

432 Research and preparation of materials were undertaken by consultants who worked with local LSC and Gloucestershire IAG Partnership staff. Identification tools were provided online for clients who wished to self-refer to services.

433 The consultants ran 12 workshops with 60 staff from 20 partner organisations designed to train front-line staff to use the tool. Training also included awareness raising on IAG, referral and front-line delivery.

Issues and learning

434 People in front-line organisations often do not have an awareness of the differences between information, advice and guidance and their purposes, and may therefore mis-refer clients. This has highlighted a training need for partner organisations and the IAG network.

435 There is a high turnover of staff, which has implications for the ongoing need to induct and train staff in referral processes.

436 Clear differences are emerging about the efficiency of both the electronic and paper-based tools. The paper-based needs identification tool might provide a framework to improve the effectiveness of front-line staff and general IAG staff, and become a useful training tool. There are also important issues about maintaining the data currency and accuracy of the electronic tool or web companion.

437 Delivery of signposting and referral has been highlighted as an ongoing training issue. The IAG partnership now has a much clearer understanding of what the partners are actually delivering as a result of this pilot.

Evaluation

438 The impact of the project is still being determined, and the good practice will feed into the new business plan in September 2003. It is anticipated that the future impact may be measured through:

> more accurate referral;

> more effective use of staff time;

> more awareness and coherence across the IAG partnership between agencies; and

> a more client-centred delivery approach.

Dissemination

439 The learning from the project has been disseminated through:

> local network events;

> regional network events;

> national events (Guidance Council or national conference);

> newsletters;

> the website; and

> regional IAG and local LSC meetings – the South West Regional LSC and IAG Forum, which takes place twice a year.

440 The electronic version of the needs identification tool and copies of the final report can be accessed on the Gloucestershire IAG Partnership website (www.go-iag.org.uk).

441 A copy of the project report can be found on the LSC Gloucestershire website, accessible by following the links from 'Local View' on the national LSC site at www.lsc.gov.uk.

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Case Study 35: Greater Merseyside: Information Advice and Guidance Partnership Away-days

Purpose and benefits

442 This project held away-days with the recently merged partnerships of the Greater Merseyside IAG Partnership, and revisited the IAG partnership's remits and protocols to ensure that they are owned by and appropriate to the requirements of the IAG partnership's local networks, and strategic steering group.

443 The benefits were to update, revise and embed the remits and protocols and to use these as a basis for continuous quality improvement.

Outcomes

444 The outcomes of the project were:

> facilitated away-days, one for each network area in Liverpool, Sefton, St Helens, Halton and Wirral;

> a facilitated half-day for the IAG partnership strategic steering group;

> an improved understanding and ownership of the Greater Merseyside IAG Partnership's remits and protocols;

> the development of a clear understanding of the roles and functions of the partnership's local networks, the strategic steering group and the LSC, and the local learning partnerships; and

> revised partnership remits and protocols, which will govern the workings of the Greater Merseyside IAG Partnership.

Method of delivery

445 The IAG partnership manager worked with one of the member organisations, Liverpool University's Graduates into Employment Unit (GIEU), to develop the away-day programme. The IAG partnership manager, in consultation with the strategic steering group, revised the remits and protocols, which were then re-launched in August 2003 and embedded through local network meetings.

Issues and learning

446 As a result of the sessions a number of points became clear. The full participation and involvement of the LSC Greater Merseyside in this activity was an essential element of the process.

447 Identifying appropriate representation was also important. Some members found it difficult to represent their organisation's vision and therefore its potential contribution to the IAG partnership.

448 Communication was a key issue resulting in the IAG partnership team putting in place, for example, a structured induction and improved membership pack.

449 Members were keen to see action points and learning from network away-days incorporated into business plans as clear evidence of their views and experience being acted on.

450 Networking opportunities have value and provide a greater understanding of how member organisations relate to each other. In addition, the opportunity to review and contextualise progress for the IAG partnership and vision for the future proved extremely positive.

451 Some factors are beyond the control of IAG partnerships and member organisations. However, it helped that people were enabled to voice their fears openly – the voluntary and community sectors were particularly fearful of the changing agenda.

Evaluation

452 Each network away-day was a 'live' evaluation. Evaluation questionnaires were also completed at each network away-day.

Dissemination

453 The programme of activities for the away-day (which drew on aspects of GIEU's Windmills Package) was shared with other IAG partnerships and local LSCs, and the revised remits and protocols circulated to all involved. The results were reported to the local learning partnerships on a local network basis.

454 A copy of the project report can be found on the LSC Greater Merseyside website, accessible by following the links from 'Local View' on the national LSC site at www.lsc.gov.uk.

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Case Study 36: Hampshire and the Isle of Wight: Championing Effective and Inclusive Information Advice and Guidance Services

Purpose and benefits

455 The broad aim of the project was to carry out a complete evaluation of IAG activity within Hampshire and the Isle of Wight area in order to take a coherent approach towards embedding IAG activities that meet the needs of the local community within all of its funded activities.

Outcomes

456 The outcomes of the project were:

> a three-year holistic delivery plan produced, published and disseminated to stakeholders;

> review undertaken of all local IAG activity that identifies the specific needs of individuals and the business community. A report will be produced and utilised for future business planning;

> success criteria established within the IAG partnership's current delivery plan, which is clearly linked to the IAG partnership's objectives and has links to all budget headings;

> SWOT analysis undertaken in respect of the supplier network's capability to deliver the IAG agenda with recommendations for implementation suppliers, including FE colleges, adult and community learning providers, work-based learning providers, workforce development providers, and staff working to secure ESF and LIF; and

> strategy planned for production and dissemination.

Method of delivery

457 A short-term secondment from the LSC was made to manage the project. Three organisations were engaged to carry out specific elements of the work: One worked with the IAG partnership to assist in reworking the development plan; a second consultancy was engaged to work with the IAG partnership and the contract manager in carrying out some research; and a further consultant was engaged to assist the IAG partnership manager develop a framework for the strategy.

458 Additional work was led by the local LSC IAG manager, who carried out additional consultation with local LSC staff and stakeholders, and reviewed a range of documents and the contract guidance of formula-funded provision.

Issues and learning

459 The local LSC took an active leadership role in managing the IAG work across the area. To the local LSC, the work and the value placed on IAG services was far beyond the scope and funding of the QDF project, and the IAG manager will continue to drive the project forward and implement the strategy, realigning as required to deal with key developments in the sector. A rolling strategy is vital to meet the demands of an ever-changing agenda and to ensure continuous development and improvement.

460 A distinct over-responsibility of the IAG partnership was identified by stakeholders and learning providers.

461 The term 'guidance' is not helpful: it is not fully understood by many and excludes other services that enhance an individual's ability appropriately to develop their skills in learning and work.

462 Local research indicated that most employed individuals surveyed would turn to their employer first for IAG on learning and work, and the primary sources for others are friends and family. This would seem to indicate the need for greater general careers education to a much wider audience and a bottom-up approach to both workforce development and community learning.

463 Although the IAG partnership is tasked with working with the client groups over the age of 19, there is a key role to work in conjunction with partners to enhance career-planning maturity across the age boundary.

464 A good deal of IAG activity happens in isolation, and is not captured or planned coherently. The IAG partnership has a key role to play in developing, supporting, and creating sustainability in these activities to provide cost-effective outreach services.

465 There is a need to develop strategies to meet the needs of the voluntary and community sectors individually, as their needs and contributions are often very different.

Evaluation

466 The project report demonstrates that IAG plays a critical role in maximising the impact learning has on an individual. The future impact of the IAG strategy will be evaluated by:

> the growth in outputs delivered by the IAG partnership, particularly the outreach delivery of advice and guidance services;

> the findings within the provider performance reviews of both the IAG partnership and learning providers;

> the integration of what is delivered by the local Connexions service and the IAG partnership;

> the sustainability of the learner representative programmes, both community and employer based;

> the number of organisations achieving relevant quality standards; and

> how it supports both local and national objectives.

Dissemination

467 On completion, the three-year plan and good practice is to be published on the local LSC website, sent to the LSC national office and disseminated to stakeholders. Research on an ongoing basis has been shared with the LSC national office, the South East LSC IAG network and with stakeholders through the IAG partnership.

468 The results of the project have been disseminated to local LSC sector managers to enhance business planning (the local Workforce Development Plan, for example), and have been fed into the Widening Participation Working Group and through provider workshops on a sectoral basis. Reports have been shared with the IAG partnership and other providers, sent to the LSC national office and shared with the South East IAG network.

469 A copy of the project report can be found on the LSC Hampshire and Isle of Wight website, accessible by following the links from 'Local View' on the national LSC site at www.lsc.gov.uk.

Further information

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Case Study 37: Central London: Improving Client Referrals

Purpose and benefits

470 The aim of this project was to improve the quality of referrals in two ways: firstly by improving the quality of the information available to personal advisers within Connexions working with young people at age 20, for referring clients towards appropriate resources; and secondly by utilising telephone follow-up contact to monitor the effect of the advice and identify weaknesses.

Outcomes

471 The outcomes of the project were:

> a resource pack for personal advisers;

> a directory containing details for approximately 700 organisations relating to IAG services, disability, homelessness, refugees, self-employment, education and training, volunteering, employment, **learndirect**, health, ex-offenders, lone parents and leisure services;

> a link to existing directories for Camden, Islington, Kensington and Chelsea, Lambeth, Southwark, Wandsworth and Westminster, and the addition of 300 more organisations;

> 342 people were followed up with a view to understanding the effect of the advice they received; and

> improvements for client referral were identified.

Method of delivery

472 For Phase 1, a market research company was contracted. The researchers networked with careers companies, adult guidance services and other agencies. They also visited libraries to find out about local services. Specialists within the careers companies were consulted about special needs and disabilities.

473 For Phase 2, a company was contracted. Clients were contacted one month after they had had an advice contact, then again three months after the advice contact. This was to provide statistical data and anecdotal evidence regarding the benefits to clients of receiving an advice session.

474 Telephone methodology was used to conduct the research to secure a high participation rate.

The interviewing was conducted using the computer-aided telephone interviewing (CATI) system. All research was conducted from a London-based call centre, with 50 CATI stations.

475 All delivery partners were contacted to participate in providing client forms for the research. The Somali Advisory Bureau and the Refugee Education and Training Advice Service (RETAS) declined to take part as much of the information surrounding refugees and asylum seekers is of a sensitive nature.

Issues and learning

Phase 1

476 Compiling the directory proved to be a useful learning experience in terms of the range of organisations encountered and the opportunity to improve the quality of information they provide. It was helpful to include national organisations (such as helplines) as well as local. When this is updated it would be worth spending more time on the layout and have a more detailed index to make it even more user-friendly. The main challenge was producing a directory that was comprehensive enough within the timescale, as the research in itself took four months. It was also difficult to decide where to stop in including agencies, particularly for health and homelessness. Some sections were harder to find agencies for than others. Ensuring an even spread was therefore difficult.

477 Finding out the detail, such as opening hours, key contacts, and so on, was difficult in some cases.

Phase 2

478 For the telephone follow-up contact, it became apparent that over 45% of the telephone numbers on forms were mobile numbers. This had an immediate impact on the overall cost of the project.

Evaluation

479 For the directory, an evaluation form will be sent out to organisations with the paper version and included on the web-based version. In the future, this feedback will be taken into account, if funding is found to update the directory.

480 For the follow-up contact, the contractor provided statistical data only and a full breakdown on the responses to the telephone interviews for both phases will be provided in their full report (due June 2003).

Dissemination

481 This directory was issued and circulated. Copies of the directory can be accessed on the local LSC's website.

482 A copy of the project report can be found on the LSC London Central website, accessible by following the links from 'Local View' on the national LSC site at www.lsc.gov.uk.

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Case Study 38: London Central: Connecting Connexions

Purpose and benefits

483 This project aimed to assist cohesion and clarity between Connexions staff and IAG services in order to provide a more coherent service for clients. There has been a range of training seminars aimed at informing people about the range of services available and how to maximise their use.

Outcomes

484 The outcomes of the project were:

> five training seminars held across the region; and

> 71 people were trained (41 from Connexions and 30 from IAG partnerships).

Method of delivery

485 A series of five training topics was offered to a variety of practitioners from the Connexions Service and the IAG partnership. Some topics were run twice to enable more workshop-sized groups to be facilitated. The topics were:

> Educational Guidance for Refugees, delivered by RETAS;

> Working with the Homeless, delivered by St Mungo's, the homelessness charity;

> Helping those with Basic Skills Needs, delivered by the basic skills coordinator from a local educational establishment. Basic skills providers delivered two 'hands-on' sessions where participants could try some of the screening methods used;

> Using Information Resources, delivered by a careers information specialist; and

> Disability Awareness, delivered by the RNIB on their own disabled-access premises.

Issues and learning

486 Initially there were some teething problems in communicating with the large number of organisations that make up the Connexions Service and IAG partnership in central London. But these were overcome and the events were very well received. Feedback showed that the participants really valued the opportunity to network with colleagues and find out more about each other's services.

Evaluation

487 Participants were able to feed back comments from the training through course evaluation forms. All sessions received very favourable feedback.

Dissemination

488 Progress was discussed at the IAG network meetings.

489 A copy of the project report can be found on the LSC London Central website, accessible by following the links from 'Local View' on the national LSC site at www.lsc.gov.uk.

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Case Study 39: East London: Strengthening Relationships with Key Partners

Purpose and benefits

490 The purpose of this project was to strengthen relationships with key partners in London's Cross River Partnership through developing common working practices for delivering IAG services.

491 The key elements of the project were to:

> strengthen relationships with Jobcentre Plus locally and **learndirect** nationally;

> draw in more clients from priority groups through developing links with the health service;

> improve referral by developing a training package for reception staff in public offices;

> develop a best-value review approach that can be used across the range of IAG provision purchased by the LSC;

> follow up clients systematically in order to establish outcomes from IAG services;

> develop customer-friendly data-collection techniques; and

> promote joint working between partners in order to improve referral.

Outcomes

492 The outcomes of the project were:

> 15 visits to job centres to get agreement to install IAG information points offering contact details on local provision and raising the brand awareness of IAG among the public;

> 13 job centres agreed to installation,.

> data from the IAG partnership and from **learndirect**'s database mapped and amended quarterly, resulting in the commissioning of a complementary Education and Training Directory, launched at the London East IAG Partnership's Network Day;

> referral links established with 20 health service organisations, although this item was not pursued due to a lack of secondee applications;

> targeted marketing materials produced to achieve brand awareness among employers at the London East IAG conference in March 2003 and aiming to introduce workforce development to employers unfamiliar with what IAG can contribute to this agenda;

> training package for referral staff developed and trialled that achieved evaluation for non-IAG front-line staff and contributed to the development of these staff in their customer-facing skills;

> best-value review was instigated, but it was agreed with the LSC that this would be dropped due to the departure of key project team members;

> follow-up report commissioned;

> improved data collection forms were designed, but it was agreed with the LSC that these would be dropped due to the departure of key project team members;

> five joint working projects funded (later reduced to four); and

> successful work on IAG delivery, including CV development, working with refugees and asylum seekers, and developing links into HE.

Method of delivery

493 Consultants were contracted to carry out best-value review and to develop a training programme for reception staff. In addition, a market research organisation was contracted to produce a follow-up report. Joint working projects were let through competitive tender. The design and production of materials were contracted through an external contract.

494 A member of staff was seconded half-time on to the IAG partnership project team to develop links with the health service. The IAG partnership contract manager was seconded for 15 days to carry out the data collection project. Links with Jobcentre Plus and **learndirect**, and the development of a promotional campaign were managed by a half-time information adviser.

Issues and learning

495 The impact of the project so far awaits feedback on the results of joint working, and the trialling of the training course for front-line staff awaits feedback from the evaluation by delegates. The Jobcentre Plus contribution will be measured through the number of increased referrals, which is monitored through returns.

Evaluation

496 The future impact will be measured by client feedback, monitoring of returns through usual mechanisms, and contractors' narrative reports.

Dissemination

497 The outcomes of the project are being disseminated through:

> presentations to local partners and IAG networks and steering groups; and

> a summary of recommendations and a follow-up report, which will be sent to the LSC national office, other IAG partnerships, and local LSCs.

498 A copy of the project report can be found on the LSC London East website, accessible by following the links from 'Local View' on the national LSC site at www.lsc.gov.uk.

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Case Study 40: South London: A New Partnership for Information Advice and Guidance

Purpose and benefits

499 The main thrust of this project was to appoint a lead person to work with local IAG providers to create a single branded IAG network for south London. The vision is:

the creation of a client-centred coherent network of high-quality IAG services working in partnership with other agencies to enable all adults across South London, regardless of personal circumstances, easy access to a service that will enable them to progress to their next stage in either learning or work.

500 Previously local providers, while all being publicly committed to the theory of joint working, had made little progress in practice other than unplanned arrangements. The project would remedy this situation by employing a consultant or manager whose remit was to establish and develop formal and developmental links with providers, and to establish sustainable working practices and relationships that would outlast the good practices of individuals.

501 The cooperative working agreements would specifically include automatic referrals and information for all adults completing a period of learning, regardless of the location and the source of funding. This would ensure that no learner is 'lost' to the system, and that no adult is disadvantaged because they are unaware of their entitlement to IAG or unsure of how to move on.

502 The project would also have a strong focus on ensuring that learners with basic skills needs are systematically followed up, to ensure that they are given the additional help they need to be retained in the system and progress to further learning either within basic skills or into other vocational and academic options.

Outcomes

503 The outcomes of the project were:

> series of working protocols agreed between the South London IAG Partnership, basic skills providers, Connexions, local **learndirect** hubs, the **learndirect** national helpline, Jobcentre Plus, the TUC (and local trade unions) and the HE institutions in and around south London; and

> protocols agreed for referrals; the provision of advice and guidance; progression opportunities and areas for joint developmental working.

Method of delivery

504 A IAG partnership liaison manager was appointed in October 2002 to act as a lead person to bring together the agencies. This manager initiated and developed personal links with senior figures in Connexions, **learndirect** hubs, the national **learndirect** helpline, basic skills providers, HE, trade unions (particularly TULRs), Jobcentre Plus and other key organisations. The manager also developed working protocols and developmental projects, and formalised referral systems and formal links between IAG staff and institutions.

505 Part of this work was also to promote a new congruence in branding, linking the **learndirect** and IAG partnership trademarks, and this was done by an awareness-raising campaign both within organisations and in the community.

Issues and learning

506 The appointment of a lead person was key to the development of a coherent approach across the area.

507 Protocols were agreed with agencies such as Connexions and **learndirect**. Jobcentre Plus committed itself to working in collaboration with the IAG partnership. Other organisations such as trade unions and the NHS, although keen, did not reach the formal agreement stage. Copies of the protocols are available for consultation and will are included in the final report,

Evaluation

508 The project will be successful if the number of learners referred between institutions increases and the quality of that referral process improves, leading to increased numbers of learners accessing or being retained in learning and work. Learners will also be more systematically followed up by IAG staff, which will ensure equality of progression for all learners, regardless of their entry point into learning. The LSC London South was also using the LIF to commission research on assessing the effectiveness of local IAG provision and the coherence of the offer. The evaluation of this project was incorporated into that research.

Dissemination

509 There has been a series of events and meetings to promote outcomes from the project to learning providers, related agencies and other stakeholders. The pan-London IAG partnership network organised a workshop for IAG partnerships across London to explain the methodologies and the benefits of collaboration, and to pass on good practice lessons. Each organisation listed has disseminated the results of the project internally on a local and pan-London basis, ensuring that the profile of the collaboration remains high among both front-line workers and managers. The local LSC has promoted the project on an ongoing basis in the local press and through internal LSC bulletins.

510 The National IAG Conference in February 2003 was used to disseminate lessons in a presentation and workshop session. Each organisation disseminated the results of the project to its own national body or organisation, and now incorporates good practice into the planning process.

511 Copies of the protocols and promotional materials are available from the LSC London South.

512 A copy of the project report can be found on the LSC London South website, accessible by following the links from 'Local View' on the national LSC site at www.lsc.gov.uk.

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Case Study 41: South London: The learndirect Hub Link

Purpose and benefits

513 The purpose of the project was to establish a direct link between the **learndirect** hubs or centres and the London South IAG Partnership to ensure a systematic and thorough follow-up for all **learndirect** learners.

514 There are two **learndirect** hubs (the East Hub and the West Hub) in south London. Although they did work with the South London IAG Partnership, there was much room for further improvement and co-operation. Learner information was not shared, referrals were sporadic in both directions, and coordinated joint working was lacking.

515 The project set out to improve this situation radically by ensuring that both partners automatically provide information on the other, and do not wait until asked. In this way, the South London IAG Partnership would follow up on all learners completing **learndirect** courses. This would strengthen the link between the two organisations on the ground, and help retain and progress learners. It would also provide for learners a causal link between the ending of one course of learning and discussion with a professional of what happens next.

Outcomes

516 The outcomes of the project were:

> stronger and formalised links between the South London IAG Partnership and the local **learndirect** hubs;

> systematic and thorough follow-up for all **learndirect** learners, which was particularly appropriate for learners who accessed basic skills courses through **learndirect**;

> a greater number of learners retained in learning and progressing to further study; and

> increased referrals between institutions.

Method of delivery

517 A project leader was appointed in October 2002, who made contact with both hubs and with **learndirect** centres in the south London area.

518 A customised (email) package was developed that included information on further courses, signposting and referral arrangements to guide all students finishing their **learndirect** courses, and a card – designed by a marketing agency – to promote the IAG service. There was email distribution to learners wanting to have further information and advice.

Issues and learning

519 There is an ongoing need for IAG coordination at the area level to make sure joint and consistent working takes place. For example, it is important to work very closely with **learndirect** staff as they will be instrumental in referring the students to the email information and advice package – briefing sessions will be needed.

520 The project experienced early difficulties in working with **learndirect** due to a lack of clarity about the respective roles of **learndirect** and the local IAG providers. The project was in fact crucial in determining the gaps in the knowledge that each agency had of each other. Networking events between IAG advisers and **learndirect** centre staff were organised, and further indicated the need for these two organisations to work together.

521 The email strand of the project was not successful, as learners do not, on the whole, use their **learndirect** email addresses. There is a move, nationally, to use the learner's own email addresses if they have one. There is also a need for alternatives to the use of email and the website as not all learners have access to or use the Internet. This could be provided through a telephone service delivered by a professional advice and guidance worker within south London or additional workers being employed and attached to local **learndirect** hub delivery centres.

522 Project recommendations include the following.

> Promoting IAG to all learners must be part of the contracts that are agreed with the **learndirect** hubs.

> The IAG partnership must promote its role more proactively so that all agencies understand the benefits of impartial information and advice.

> IAG staff should make or remake contact with existing **learndirect** centres and establish contact when the new centre comes into operation.

> IAG should be part of every new **learndirect** staff member's and every learner's induction.

> **learndirect** centres need to be encouraged to become members of the IAG partnership so they can access training, resources and networking opportunities.

> Information about the **learndirect** national helpline, should be included in any in-house publicity and other marketing materials and campaigns.

> Information about IAG should be included on the websites of the two **learndirect** hubs.

523 An information pack, accessible online, was designed, and the contents are:

> an effective job search strategy;

> effective written applications and CVs;

> effective interview techniques;

> websites and contacts for an effective career choice;

> options to the end of **learndirect** courses; and

> advice on making an effective career choice.

Evaluation

524 The impact of the project will be evaluated through the monitoring of IAG activity through the business planning process.

Dissemination

525 There has been a series of cross-London events and meetings run to promote outcomes from the project to learning providers, related agencies and other stakeholders. Each partner organisation has also disseminated the results of the project internally. The **learndirect** hub link project report is accessible on the LSC London South website.

526 The local LSC has promoted the project in the local press and through internal LSC bulletins. The National IAG Conference was also used to disseminate lessons so far.

527 A copy of the project report can be found on the LSC London South website, accessible by following the links from 'Local View' on the national LSC site at www.lsc.gov.uk.

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Case Study 42: South London: Branding the Information Advice and Guidance Helpline

Purpose and benefits

528 The purpose of this project was to develop a link between the national **learndirect** helpline and the South London IAG Partnership, and to develop a local helpline with a single branding with the intention of reducing the number of callers 'lost' to current diverse methods of accessing information.

529 As is the case nationally, problems exist locally in the integration of the **learndirect** information line and the IAG partnership. This creates a confusing system for learners and other local residents as there is no 'one face' of IAG. Prospects, the local careers company which is also the lead partner in the South London IAG Partnership, runs a local helpline for personal advisers that is staffed by guidance workers with a wide local knowledge and links into information about learning. This service was not available to the general public. When the **learndirect** helpline made a referral, it was only on request of the caller, and it was to whoever seemed most appropriate at the time so that often potential learners got lost in the system as they were referred around, trying to find the most appropriate person to contact.

530 This project would test the feasibility of a new link between the national **learndirect** helpline and a local south London helpline, open to both personal advisers and the general public. It was proposed that when calling the national 0800 number for information about learning in south London, callers would be referred to the south London number for further information. The professional advice and guidance staff on this south London number would then undertake to provide the information requested, or find it out for the caller and return their call. Callers would therefore make at most two calls – one to the national number and one to the south London number for further information.

531 The south London number would further be marketed with the double branding of the South London IAG Partnership and local **learndirect**, to reduce confusion between the two services, and providing only one brand for access to IAG, either at national or local level.

Outcomes

532 The outcomes of the project were:

> model of improved working created between IAG partnerships and the national **learndirect** information line;

> a more cohesive service emerged through both joint branding and more effective, consistent and proactively promoted referrals;

> number of more effective referrals increased; and

> **learndirect** is now recognisable as the access point for IAG services by both the general public and other institutions and agencies.

Method of delivery

533 There were three strands to this project.

> An ICT consultant worked on the national and local helplines to ensure that national operators, through a link in the national ICT system, automatically offer referral to the local number when dealing with an enquiry.

> Advice and guidance staff were employed to operate the local helpline and extend its activities. This was done by offering additional hours to existing advice and guidance staff employed through the South London IAG Partnership, or by external recruitment.

> The new service was actively promoted through existing South London IAG Partnership channels and through an awareness-raising campaign in the community and local agencies. LinkLine (the branded IAG helpline) was promoted to major agencies and especially to **learndirect** centres in south London.

Issues and learning

534 There were some difficulties in the relationship with **learndirect**, as locally it was felt that they could supply more referrals and information to providers. After numerous discussions with senior staff from the Ufi and **learndirect**, the project steering group decided that it would not be appropriate to pilot the scheme as intended in the bid. LSC London South decided to carry on with the work LinkLine was doing, and by the end of February 2003 the volume of calls had considerably increased from members of the public and organisations wanting to find out more about the services of the helpline. The outcomes of this strand of the project have been so successful that the LSC London South

decided to mainstream this activity and integrate it into the IAG delivery plan for 2003/04.

535 Discussions have taken place informally with senior LSC staff and senior Ufi staff, and LSC London South is hoping that they will be able to pilot a link between the **learndirect** call centre and LinkLine in 2004.

Evaluation

536 The impact of the project will be evaluated through the monitoring of IAG activity through the business planning process.

Dissemination

537 There has been a series of events and meetings to promote outcomes from the project. Each partner organisation has disseminated the results of the project internally on a local and pan-London basis and uses lessons learned to promote and maintain good practice within their organisation. The local LSC has promoted the project in the local press and through internal LSC bulletins. The National IAG Conference 2003 was also used for dissemination.

538 A copy of the project report can be found on the LSC London South website, accessible by following the links from 'Local View' on the national LSC site at www.lsc.gov.uk.

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Case Study 43: Greater Manchester: Basic Skills Assessment and Training Needs Analysis

Purpose and benefits

539 The aims of the project were to:

> ensure all Greater Manchester IAG partnerships were offered the opportunity for IAG practitioners to participate in basic skills awareness and initial assessment training;

> extend the training needs analysis developed through City Pride IAG Partnership to five other IAG partnerships, to identify the training needs across the partnerships; and

> assess the practical issues associated with IAG-specific training programmes.

Outcomes

540 The outcomes of the project were:

> 81 practitioners trained in basic skills awareness and initial assessment training, which was modelled on training provided to New Deal advisers within Jobcentre Plus;

> training evaluated by practitioners and coordinators, with recommendations rated by 75% as 'good' or 'very good';

> high standard of skills and knowledge shown across the IAG partnerships on many fronts; and

> high level of skills and competences across all sectors and provider types was shown.

Method of delivery

541 The Greater Manchester IAG Partnership undertook the commissioning and coordinating of the delivery of the training across the six IAG partnership areas covering the whole of Greater Manchester, using a variety of providers, but all adopting the same model for delivery of the training.

542 The project comprised: a questionnaire to all network members, interviews with coordinators, desk research, focus groups, and job observation.

Issues and learning

543 Common themes were identified in how the sessions will help in addressing basic skills issues with clients. These included increased awareness, being able to identify needs in relation to accessing employment, identifying clients with basic skills needs, and increased confidence to broach the subject with clients.

544 The evaluation report made three recommendations. Firstly, that IAG coordinators consider ways of ensuring effective updating through existing communication methods such as IAG websites, newsletters, network meetings, mailings, and so on. Secondly, that all partnerships consider the use of a local protocol detailing referral and communication processes in order to ensure that all IAG partners and local basic skills providers agree a way of working collaboratively. Thirdly, that up-to-date information on basic skills provision is collated and housed in a format that is accessible to IAG partnerships and their member organisations. Use of a central database or website would allow effective referrals to be made.

545 IAG providers were making good use of the relevant and highly rated training courses run by the IAG partnership. Most IAG partnerships had the processes in place to seek views from network members about appropriate topics and practical arrangements for training courses.

546 The project highlighted key skills and knowledge development needs that would not be met by the existing training plans of the IAG partnerships. There could also be benefits in sharing training across Greater Manchester on a limited or wide scale.

Evaluation

547 The initial evaluation reports were available in January 2003 and recommendations were fed into a Greater Manchester IAG Partnership meeting in January 2003. The final report was considered fully at the Greater Manchester IAG Partnership meeting in May 2003.

Dissemination

548 The analysis and recommendations have been incorporated into the basic skills strategy and action plan for the LSC Greater Manchester. The basic skills strategy and action plan will take forward the priorities for the delivery of further basic skills training and support.

549 A copy of the project report can be found on the LSC Greater Manchester website, accessible by following the links from 'Local View' on the national LSC site at www.lsc.gov.uk.

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Case Study 44: North Yorkshire: Tracking Unmet Needs

Purpose and benefits

550 The purpose of this research project was to find out and track of a sample of clients recorded as having unmet needs following contact and initial intervention with the IAG service in North Yorkshire. It was known that a number of clients went away from sessions with no suitable course being available, and that a lack of funding, transport or childcare was preventing course participation. The question was – could the IAG service do more to reduce the number of clients with unmet needs? Having discovered the facts, it was planned to propose a system for embedding the collection of unmet needs data into IAG network practice locally and to use the information in the IAG planning processes. The information would also be disseminated nationally.

Outcomes

551 The outcome of the project was:

> a report that made recommendations for the development of IAG in the area.

Method of delivery

552 The work was contracted, and research took place between October 2002 and January 2003. This included:

> the identification of sample clients;

> piloting and refining a questionnaire and telephone interview process;

> tracking of clients with unmet needs using a sample of one month (96 clients) from those recorded in 2001/02 in York and North Yorkshire;

> producing and administering a final questionnaire; and

> collating and analysing the results.

553 The IAG sub-group of the learning partnerships and the IAG working groups of the North Yorkshire and York Learning Partnerships provided steering and advisory groups for the projects.

Issues and learning

554 During the project, a number of needs became apparent. Further clarity and better marketing of the IAG brand is required. Clients need to be clear about what they can expect from the IAG brand.

555 There needs to be implementation of a consistent and standard data collection system. Ideally, there should be a separate form to record all unmet needs (not just on the IAG clients' enquiry forms), to allow staff to keep track of unmet needs and to facilitate follow-up activity. This form should include:

> the date;

> the need (for example, how to use an Apple Mac, vegetable gardening course, confidence-building, self-defence for women, and so on);

> the level required (such as beginners, intermediate, advanced, just for fun);

> the barriers to participation (the lack of a crèche, for example, or the wrong time of day, only available in Leeds, and so on);

> the action taken by the client (such as enrolled on something else, or kept details on file);

> the action taken by the worker (other organisation approached, for example);

> the client's name, address and telephone number; and

> the name of the IAG worker (for accountability issues).

556 The purchase of an IT scheduling software package would allow staff to monitor and follow up more effectively.

557 Staff need encouragement to follow up wherever possible. Staff attitudes need to be changed from 'Type A', where staff are not proactive (where they do not consider it to be their role to offer more than information or to go out of their way to try and find solutions), to 'Type B', where workers are proactive and do everything in their power to try and meet the needs of clients. Some IAG clients are motivated and determined to learn and develop, but there are many who require a helping hand. By encouraging more follow-up, workers can look after clients, helping them to achieve their goals.

558 It was important to make the focus people-led, not target-led. All organisations need targets to aim for, but these targets should emerge from what clients need and want. The priority should not be hitting numbers to meet funding targets (such as setting targets for guidance); it should be about the public and its needs.

Evaluation

559 Further work will be undertaken as part of an external evaluation of the IAG partnership.

Dissemination

560 The project findings were reported to the North Yorkshire IAG Conference held in February 2003 and publicised through the local IAG newsletter.

561 A copy of the project report can be found on the LSC North Yorkshire website, accessible by following the links from 'Local View' on the national LSC site at www.lsc.gov.uk.

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Case Study 45: Somerset: Pocket Directories for the Networks

Purpose and benefits

562 The purpose of this project was to design and pilot several pocket-sized information network directories to be carried easily by front-line staff, network members, TULRs and employers. The objective was to enable IAG staff to be better informed and able to make more accurate and appropriate referral decisions.

Outcomes

563 The outcome of the project was:

> pocket directories, which include CDs, designed, written and printed.

Method of delivery

564 Volunteers were invited from the IAG partnership to form a focus group. This allowed the central organisation to ascertain what information would be most useful, in addition to members' basic contact details. The focus group also considered what style, shape and size the pocket directory should be.

565 A design consultant was employed to produce samples of the directory and the group eventually chose a Filofax (C5) -size plastic cover for the directories, which holds standard inserts that can be adapted by individuals as required. As the directories can only hold a snapshot of contact information, an IT consultant was employed to produce a mini-CD, which would be distributed with the hard copy and which would include full member information.

Issues and learning

566 The key learning from this project was that it is easy to underestimate the amount of time necessary for a project. There is also a need to obtain realistic costings – guesstimates are not enough.

Evaluation

567 The impact of the project so far has been seen primarily in the amount of time that has had to be spent by the central team on its administration. However, members of the IAG partnership are very enthusiastic and the prototypes have been extremely well received.

568 Future impact will be assessed through continuing evaluation and feedback from members of the IAG partnership, which could lead to possible variations in design after a more prolonged period of usage.

Dissemination

569 The outcomes are being disseminated through presentations to the IAG partnership steering and network groups, through the IAG partnership's conferences and website.

570 A copy of the project report can be found on the LSC Somerset website, accessible by following the links from 'Local View' on the national LSC site at www.lsc.gov.uk.

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Case Study 46: Staffordshire: Mapping Information Advice and Guidance Provision

Purpose and benefits

571 This project enabled IAG activity that is not funded through the IAG partnership to be audited so that commonality and differences were analysed and integration arrangements developed. The benefits of this have been to raise the profile of IAG activity, widen the network of active organisations to share data, build support and, in the longer term, to develop a more strategic approach to planning, delivering and influencing IAG service across the county.

572 The project explored the needs, opportunities and current relationships between IAG activity and regeneration in Staffordshire and Stoke-on-Trent and how to enhance or develop new links. In terms of regeneration this reflects inclusion (the need to provide full coverage to communities and geographical areas and to promote the ethos of social inclusion) and inclusiveness (the need to foster an IAG partnership that includes and represents all types of provider).

Outcomes

573 The outcomes of the project were:

> wider provision of IAG activity, additional to existing provision through the IAG partnership, was detailed;

> funding sources identified, along with types of data collected, and reporting formats to identify how all provision could be reported on holistically for Staffordshire and Stoke-on-Trent;

> longer-term, strategic developments and IAG partnership arrangements to be developed to address local priorities; and

> identification of how IAG could be delivered in companies.

Method of delivery

574 The local Centre for Economic and Social Regeneration at Staffordshire University was commissioned to conduct research about the future development of the IAG partnership, and in particular its role working with employers and regenerating disadvantaged groups and communities.

575 A written questionnaire was developed to go to organisations with experience of operating in regeneration programmes and delivery of IAG services. Face-to-face interviews and focus groups were also held.

576 In addition, the Staffordshire Regeneration Network brought together a workshop event to focus participants upon the role of IAG within regeneration across the whole county.

Issues and learning

577 The project manager would in hindsight have allowed more time to achieve this project, particularly by spending longer on identifying the end outcomes at the beginning of the project. It took longer than anticipated to get the project off the ground in the initial stages. The internal IAG staff needed to be fully briefed about and involved with the project and its purpose, to be reassured that the project was about enabling IAG services to grow, not evaluating them.

578 There were considerable benefits in commissioning an organisation that had a thorough knowledge of regeneration within the local area, as it enabled the contractor to be up to speed quickly with the project's outcomes and issues. There has been mutual gain from increased communication and understanding of IAG with LSC staff and university staff from working together on this project.

579 The data gained from outreach workers in highlighting geographical gaps and ideas for growth were particularly useful in understanding some of the difficulties and barriers that prevent IAG services from penetrating some areas.

580 It will be important to promote and strengthen links between regeneration initiatives on the one hand and the IAG partnership and network members on the other. It is also important to consolidate and strengthen links with IAG network members, increasing the support and benefits of membership and building on successes.

581 A clear and realistic vision of what the IAG partnership is seeking to achieve through working with employers is needed, to focus efforts upon developing closer links with employer and employee intermediaries who can signpost IAG services, and build upon the successful TULR model, including providing more training.

582 As a result of the project, the IAG partnership will be promoting the adoption of a completely different approach to traditional delivery that is innovative and individual – not institutional, but one that proactively engages the community and responds to the specific needs of each client.

Evaluation

583 An interim report was produced in December 2002 for the IAG partnership with findings from the questionnaire and workshops, and the final report was produced in March 2003.

584 The degree to which the report influences the LSC business planning process for 2003 and beyond will be a factor in determining the effectiveness of the project.

Dissemination

585 A project report summary was produced at the beginning of February 2003 and circulated by email to all local LSC IAG contract managers. Summary findings were presented to the IAG strategic board in February 2003.

586 The main report was produced in March 2003, with full copies sent to the IAG partnership and key local partners, the LSC national office and to a number of other local LSCs that requested it. The report findings will be used to plan and monitor the extended 2002/03 contract delivery plan, and particularly in the August 2003 plans.

587 A copy of the project report can be found on the LSC Staffordshire website, accessible by following the links from 'Local View' on the national LSC site at www.lsc.gov.uk.

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Case Study 47: Suffolk:
Checklist of Good Practice for Information Advice and Guidance Work

Purpose and benefits

588 This project has built upon a previous exchange of information checklist project, which highlighted IAG policy and practice in 2001. The purpose of the current project was to share good practice across the key 16 areas of IAG service. It aimed to make using information easier than the previous checklist documentation by introducing an index and seeking up-to-date case studies that illustrated good achievement and good practice in IAG provision.

589 The benefits of this were to promote communication across the IAG service and to encourage a systematic exchange of effective practice so that IAG partnerships do not have to reinvent the wheel when developing areas in which they have not had much experience.

590 This would also make it easier for people to celebrate the success of IAG and its effectiveness within communities and thereby create a feel-good factor for all involved. At the same time it would continue to raise the profile of information available, which assists people to access IAG services.

Outcomes

591 The outcomes of the project were:

> the identification of key areas of work and good practice, to be surveyed and shared between IAG partnerships across the county; and

> further development of the first checklist by making it easier to use and to complement numerical MI data already gathered by detailing real-life examples of the differences being made by IAG work with clients.

Method of delivery

592 LSC Suffolk contracted with Suffolk IAG Partnership, which had previously undertaken the first piece of checklist work when it was funded by the DfES in 2001. A shortened version of the previous checklist questionnaire used in 2001 was issued to all IAG partnerships along with a letter inviting people to focus upon good practice. The project also made links to another research project by Walsall IAG Partnership to make the best use from information already gleaned so that IAG partnerships didn't have to answer twice.

593 This letter was followed up with telephone contact to obtain feedback and questionnaire information. This proved to be a more effective way of gaining the information because it was a more productive use of IAG partnership members' time.

Issues and learning

594 At the start of the project, the consultant experienced some difficulty in gaining accurate and up-to-date names and addresses of all of the IAG partnerships, which delayed the sending of emails. This was remedied quickly.

595 Another difficulty was that initially a low response rate was experienced (15 replies out of 70), probably due to overload of the IAG partnerships rather than not having examples of good practice, for the quality of this initial return was in fact very high, with some very practical case studies. The low initial response was overcome by the consultant conducting questionnaires through telephone contact with the IAG partnership officers rather than by asking the IAG partnerships to complete their own questionnaires in writing. This meant that IAG partnerships were able to convey their good practice orally much more quickly. If this project were to be repeated, the telephone questionnaire would be used as the main way of gaining the required information.

Evaluation

596 The key factor in determining the effectiveness of the checklist was the extent to which IAG partnerships reported using it easily and quickly to assist them with their work.

597 Feedback will be gained through a questionnaire or the telephone in October 2003 from IAG partnerships about how they use the checklist and what specific pieces of work it has assisted.

Dissemination

598 The final checklist report was available in April 2003 and issued to IAG partnerships and local LSCs. The new index and case studies were promoted at the Market Place section of the IAG National Conference in February 2003.

599 A copy of the project report can be found on the LSC Suffolk website, accessible by following the links from 'Local View' on the national LSC site at www.lsc.gov.uk.

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Case Study 48: West Yorkshire: A Single Partnership for West Yorkshire

Purpose and benefits

600 This project focused on the need to develop a single IAG partnership in West Yorkshire, where four IAG networks had previously operated. It had four strands of work focused on evaluating existing arrangements and identifying good practice. It would inform specific areas of the IAG business plans for sub-regionalisation of the IAG partnerships in 2003. The work would enable the four IAG partnerships in West Yorkshire to develop relationships with the LSC and each other, and to work towards common IAG provision across the area.

601 The four strands were:

a Quality and Training, with two main tasks:

> to place IAG delivery within a quality-assured framework; and

> to recommend a training framework for delivery staff;

b Management Information, aiming to consider how to use the MI to benefit the LSC, IAG partnership or learning providers and clients;

c Marketing and Promotion, aiming to research the potential for joint ventures, especially in website development; and

d Embedding IAG in strategy, learning provision and bidding structures. This was seen as a complex issue, which impinged on the work of the LSC and IAG partnerships.

Outcomes

602 The outcomes of the project were:

> the development of a framework for the IAG partnership initiative in West Yorkshire;

> support for both the LSC and local provision in the transitional stage to sub-regionalisation;

> increased consistency, standardisation, sharing and embedding of good practice;

> a better understanding of what constitutes value for money, to inform efficient usage of resources; and

> reports and new support materials for IAG providers and other stakeholders.

Method of delivery

603 The local LSC took on the overall management of the project while the IAG partnerships led on the different strands. Independent consultants carried out the necessary evaluation and research, which included carrying out desk research as well as interviewing staff, delivery partners in the IAG partnerships, and other stakeholders. This enabled there to be a comparative study of practice across the sub-region, which highlighted good practice. In the case of some of the strands, such as Quality and Training, and Marketing and Promotion, the recommendations have led to supporting documents being written: a quality manual and booklet on working with the media.

604 A project manager was appointed to coordinate the work. There was a steering group, made up of representatives of the local LSC and the IAG partnerships, which received regular progress reports.

Issues and learning

605 The key learning summarised from the project strand reports is described below.

Quality and training

> Local IAG partnerships are invaluable as a means of disseminating information and sharing expertise.

> Partnership working enables greater flexibility in funding and sharing specialisms.

> Funding should be coordinated at a regional level to avoid duplication, gaps and double-funding.

> Activity should be monitored and evaluated using the West Yorkshire Quality Manual as a framework.

> Evaluation measures should be both quantitative and qualitative, and should be a contractual requirement.

> Existing NVQ and other accredited training should be supplemented by locally delivered training targeted at business needs.

> Training should sit within a CPD structure.

Management information

> A standardised data system should be used to benchmark performance, and ensure conformity to standards.

> Staff training and protocols with delivery partners need to be part of this development.

> Reports and presentations of the data should be available at any time.

> Greater effort should be focused on analysing qualitative data collected from clients.

> The MI system should not be concerned solely with client information; there should be a facility to record resource input.

Marketing and promotion

> A dedicated member of staff should write the strategic sub-regional marketing plan, and carry out central marketing activities.

> A set of standard guidelines should be issued to members encouraging them to use IAG brands to increase awareness.

> More internal marketing needs to be carried out, so all staff can successfully communicate the benefits of IAG.

> Systematic evaluation of marketing and public relations should be undertaken.

> Consistent marketing messages need to be developed for each target audience.

Embedding information advice and guidance

> Although IAG is written into policy documents, in general terms the widespread understanding of what IAG can do and achieve is lacking.

> There is potential to achieve a much better integration of IAG into learning.

> The potential is there to re-define and develop the IAG image into a range of products to suit different needs.

> There is a need to develop better monitoring and evaluation of IAG.

> There is a need to develop IAG delivery models.

Evaluation

606 The impact of the project so far has been evaluated through its steering group, which will review the project after the sub-regional conference.

607 The research activities have raised awareness and made new links. Working groups are to be established to carry forward the project recommendations. Future impact will be assessed through these, and through the role of the West Yorkshire IAG Partnership manager.

Dissemination

608 The outcomes of the project will be disseminated through the reports, executive summaries, and support materials. A training event has been planned to launch a pack to promote the integration of IAG with key organisations.

609 A copy of the project report can be found on the LSC West Yorkshire website, accessible by following the links from 'Local View' on the national LSC site at www.lsc.gov.uk.

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Section 5: Developing the Use of Information and Communications Technology

Case Study 49: Bedfordshire and Luton: Information Advice and Guidance Learning Link

Purpose and benefits

610 This project has developed the Bedfordshire and Luton IAG Partnership website (www.iag-bedsandluton.org.uk) to provide an enhanced local information and advice resource for adult learners, which has enabled access to learning and, for those already engaged in learning, identification of appropriate progression opportunities and encouragement to continue learning.

611 The website is available to all adult learners and potential learners and is particularly aimed at supporting those who are accessing their learning through community-based and outreach-based centres, and any other learning centres away from the traditional support structures of colleges and universities.

612 There were two parts to the project: the first was to improve the information about learning opportunities and the second was to provide advice through an electronic self-assessment programme.

Outcomes

613 The outcomes of the project were:

> a link to the 'Hot Courses' search engine, and so access to the **learndirect** national database of learning opportunities for the IAG partnership's defined geography;

> links to the websites of all adult learning providers, including universities, FE colleges, adult education programmes, community colleges, and private colleges within the defined geographical area;

> links to the websites of specialist adult learning providers not in the geographical area but within travelling distance, such as the Open University;

> a standard form for course information from learning providers with no website, to enable them to submit course details for publication on the IAG partnership's website; and

> a guided self-assessment programme, which leads to generic conclusions about first or next steps in learning, the conclusions from which can then be used as the basis for a search of the information about learning opportunities.

Method of delivery

614 The IAG partnerships manager consulted locally, then wrote a specification and contracted the work out.

Issues and learning

615 It was useful to have built into the contract the testing and assessment of existing websites, particularly for the self-guided advice. This helped to avoid 'reinventing the wheel'. The sites browsed were at:

> www.learninfozone.co.uk;

> www.learningservices.org.uk;

> www.open.ac.uk/learners-guide;

> www.thecoursefinder.co.uk; and

> www.plumworks.co.uk.

Evaluation

616 The project tested the effectiveness and ease of use of the enhanced website with a variety of users and made amendments as indicated by their feedback.

Dissemination

617 The final project report outlining progress and learning points was circulated in May 2003 to the local LSC, learning partnership and local advisory groups, which included community and voluntary groups.

618 A copy of the project report can be found on the LSC East of England website, accessible by following the links from 'Local View' on the national LSC site at www.lsc.gov.uk.

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Case Study 50: Cheshire and Warrington: A Management Information System for Information Advice and Guidance Services

Purpose and benefits

619 This project designed a web-based database to provide an MI system for IAG providers. The system logs adults who have received an IAG service, tracks where they are after a fixed period, and enables referrals between agencies to be managed and tracked. The tracking of individuals enables the effect of receiving an IAG service to be evaluated.

Outcomes

620 The outcomes of the project were:

> a database of IAG sessions (based upon the Core Plus system already used by Connexions for young people) accurately recorded by IAG providers showing age, location, gender, employment status, basic skills needs and ethnicity of adults in receipt of service;

> the installation, running and monitoring of the developed MI system on a server with Connexions;

> MI reports that meet LSC national office criteria;

> an assessment of IT capability within contracted providers and the provision of PCs with Internet access;

> training for providers to operate the new web-based system;

> a development of providers' IT skill levels and email capability; and

> the tracking of referrals between agencies and of individuals in receipt of IAG services.

Method of delivery

621 Connexions were commissioned to lead the delivery of the project.

Issues and learning

622 There was some initial slippage with the project timescale because of software teething difficulties. However, because the project had a dedicated IT trouble-shooter from the lead provider (Connexions), they were able to spend a significant amount of time resolving software difficulties. An added plus was utilising and developing the existing Connexions database. This meant the trouble-shooter was already familiar with the database and its operation.

623 There was an initial learning curve for the local LSC, IAG partnership network and IAG providers in discovering the importance of the role of robust management data in assisting the development and growth of IAG, particularly in relation to being able to use effective MI to achieve national workforce development targets.

624 The shift in emphasis and priority towards targeting employed adults through the workforce development strategy assisted the IAG partnership to focus minds upon clarifying with employers about how IAG can assist to resolve problems and offer advantages. The electronic tracking of individual outcomes and the effects of IAG have assisted providers in this complex area.

625 The investment made in developing good working relationships within Connexions was very productive.

Evaluation

626 A report on the design, implementation and outcomes of the project was produced by Connexions in March 2003. This included some evaluation of the initial outcomes.

Dissemination

627 The report was shared through the local IAG network and through the two local learning partnerships.

628 A copy of the project report can be found on the LSC Cheshire and Warrington website, accessible by following the links from 'Local View' on the national LSC site at www.lsc.gov.uk.

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Case Study 51: Cumbria: Identifying an Acceptable Management Information System

Purpose and benefits

629 The purpose of this project was to develop a common acceptable MI system that would be used across the Cumbria IAG Partnership and streamline the collection of MI. This would involve an audit of current practice and information needs and the development of an agreed common system. The expectation was that the MI system would incorporate individual learner records.

630 A key challenge was to produce a system that met the information needs of all the funding streams involved in IAG including the Single Regeneration Budget, the local LSC, LIF, and the ESF.

Outcomes

631 The outcomes of the project were:

> an audit report describing the current use of IT for the collection of MI;

> the development of a common data collection form that incorporates the information needs of all the funding streams;

> a prototype CD containing the form produced and distributed to partners; and

> support and training delivered to partners in the collection of MI.

Method of delivery

632 A project worker was employed to undertake the audit of current practice and information needs and identify areas for development. A key component of this work was to develop links with each of the partners and to offer individual support and training to partners in the collection of MI.

633 In practice, with the exception of one provider, partners collected MI manually. The data was collated by the IAG coordinator and input into spreadsheets, and the information was then used to complete quarterly claims.

634 Over the years the partners had amended and standardised their claim forms so the range of data required by different funders was captured. The project worker developed this work and produced a standard form that took on board the needs of all the partners and funding streams.

635 Connexions Cumbria, as the largest provider of IAG, had developed an access database for collecting MI. It was decided to build on this work and to extend the use of the database to IAG partnership members.

Issues and learning

636 A data collection form, which simplified data collection, was achieved and used effectively by the IAG partnership. This has resulted in:

> an increased use of IT;

> a more efficient use of IT;

> less time spent by partners on collecting data;

> the efficient return of MI to the IAG partnership and the LSC; and

> the incorporation of individual learner records into the collection of MI.

Evaluation

637 Future impact will be assessed through the IAG business planning process.

Dissemination

638 The project worker has produced a report for distribution among partners and other interested parties and has given presentations of the findings to the IAG partnership and steering group and to other interested parties by invitation.

639 The project report has been circulated to the steering group, IAG coordinators, LSC contract managers and other staff, the DfES, the TUC, the Guidance Council, GAB, and other interested parties.

640 A copy of the project report can be found on the LSC Cumbria website, accessible by following the links from 'Local View' on the national LSC site at www.lsc.gov.uk.

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Case Study 52: Kent and Medway: Client Record Systems

Purpose and benefits

641 The purpose of this project was to develop a careers guidance database so it could be shared by IAG and Connexions staff. It would hold individual client records to facilitate the tracking and monitoring of IAG clients, and would enable the collection and use of data through employing a geographical information system (GIS) that could be used for planning purposes.

642 This project was developed against a background of individual client data needing to be collected for IAG and co-financing ESF or LIF advice and guidance sessions. Reports were also required for both LSC quarterly reporting and MI purposes. In Kent and Medway, as in many other parts of the country, this required the establishment of a database that would hold an individual client record as well as activity data about information sessions, referrals, community partner development work, group work, course brokerage and other funded work.

643 In Kent and Medway, a common universal referral system had been agreed between the Connexions partnership and the IAG partnerships to ensure coherence in the community sector. This also provided the potential for analysis and tracking of referrals. The use of GIS software would enable sophisticated analyses to be undertaken, which would enrich the information that was fed back to members.

644 The project set out specifically to:

> create the configuration that was necessary to develop a database for IAG, ESF or LIF use;

> develop protocols for the migration of records across the Connexions–IAG interface;

> develop further the analytical tools provided by GIS for reporting high-quality statistics to LSC, IAG partners and Connexions; and

> disseminate the outcomes of this work to IAG (and Connexions) partnerships nationally and to inform the LSC's national QDF project on MI.

Outcomes

645 The outcomes of the project were:

> data collection system established that was capable of providing quarterly reports to LSC for IAG and ESF- or LIF-funded work;

> suite of reports using GIS developed, to provide analyses of advice and referral statistics to inform LSC and IAG partners of details of clients, referrals and demographic information on uptake;

> monthly reports produced, providing MI for the LSC and the IAG partners;

> protocols put in place regarding the transfer of client records from Connexions to the IAG partnership; and

> report and presentation produced to disseminate the results nationally.

Method of delivery

646 The careers management group undertook to configure the database, provide reports and provide training and support for users. A consortium developed the suite of reports by buying in consultancy and through the engagement of a project coordinator from within the IAG partnership. The IAG partnership manager ensured the national LSC QDF project was kept informed.

Issues and learning

647 When the original project bid was written, the intention had been to use the database then used locally by the local Connexions service. Subsequently, the Kent Adult Guidance Service was taken over by Prospects, which used a different system. However, because the data fields were the same, the project team was able to develop a process for transferring information between the two databases.

648 Key to data input was the development of a common, easy-to-use form that could be used by all IAG providers. This was achieved by amending the ESF short event form, which then met the information requirements of all the current IAG funding regimes.

649 Laptops can be used to input and transmit data to the database. At present a paper version is also necessary, as many providers and staff are not equipped with computer equipment for this purpose.

650 IAG partners appreciate the production of MI reports generated from the statistical returns they send in. It gives the collection of data an immediate purpose and benefit. However, it was important to have a fail-safe system that made sure all the mandatory data fields had been completed.

Evaluation

651 Future impact will be assessed through monitoring the effectiveness of the system through the business planning process.

Dissemination

652 Locally, the project involves all 146 partners of the IAG partnership and members of the Connexions partnership. Advisers input to the database directly or indirectly. The local LSC and IAG partners receive statistical reports and have bespoke reports about aspects of IAG activity as it relates to them.

653 The report and presentation demonstrating the project are available for key organisations in Kent and Medway. Other IAG partnerships in the south-east region will be able to benefit from the outcomes by adopting the database without the need for development cost. Other databases, developed across the country, will have broadly the same fields, and the analytical potential of GIS will be applicable across all of them.

654 A copy of the project report can be found on the LSC Kent and Medway website, accessible by following the links from 'Local View' on the national LSC site at www.lsc.gov.uk.

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Case Study 53: Greater Merseyside: Developing Capacity

Purpose and benefits

655 This project has developed the ICT capacity of the IAG partnership in order to ensure appropriate mechanisms are in place for the collection and collation of required MI. The benefits have been to improve the accuracy, speed and ease of data collection and link local improvements to the national QDF project for enhancing MI.

Outcomes

656 The outcomes of the project were:

> a robust ICT MI database for the collection and collation of information or advice returns;

> a development of the ICT capacity of all partner members to interact with MI requirements; and

> the enablement of Connexions personal advisers to refer clients to IAG providers and vice versa.

Method of delivery

657 A consultant was employed to research the most effective ICT system, hardware and software. A survey was conducted of voluntary sector providers to assess the degree of hardware support needed, and the new system was implemented.

658 As part of the national working project, specific links were made to the national QDF project for MI by the development manager.

Issues and learning

659 A primary concern for the Greater Merseyside IAG Partnership was to ensure compatibility with IAG partners' existing IT systems.

Evaluation

660 The new MI system will be trialled between April 2003 and July 2003 with six IAG providers.

Dissemination

661 The MI system outcomes will be shared with other providers, partnerships and LSCs by way of a report (due August 2003).

662 A copy of the project report can be found on the LSC Greater Merseyside website, accessible by following the links from 'Local View' on the national LSC site at www.lsc.gov.uk.

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Case Study 54: Greater Merseyside: Developing a Website

Purpose and benefits

663 This project enhanced the Greater Merseyside IAG Partnerships website from an underdeveloped, very basic site to facilitate its usage across the IAG partnership for the purposes of:

> client referral;

> IAG partnership or local network monitoring of referral;

> partner-interactive updating of the IAG partnership referral directory;

> publicity of IAG partnership events, new services on offer, and so on; and

> online access to the IAG partnership's quarterly newsletter.

664 The benefits of this have been to increase access to good-quality information quickly by helping people find out easily about IAG services and the links to **learndirect**, as well as publicising news events to keep people up to date. This has also encouraged the development of partner organisations' website links.

Outcomes

665 The outcomes of the project were:

> a multi-functional website for Greater Merseyside IAG Partnership (www.greatermerseyIAG.org.uk);

> an enhanced IAG partnership client referral system;

> an economic means by which to update the Greater Merseyside IAG Partnership referral directory for 2003/04 (the current paper-based method costs around £25,000 a year); and

> an appropriately linked website for partners and wider network usage.

Method of delivery

666 The delivery of the enhanced website was contracted out to a local IT consultancy that had already developed the very basic website. The Greater Merseyside IAG Partnership coordinator contract-managed the project.

667 The IAG partnership quality sub-group, drawn from all six IAG partnership networks, was utilised to ensure the development of the site was responsive enough.

Issues and learning

668 The site has been a success, with about 1,200 hits a month. Many partners (almost half) were keen because it is a useful way to explain the role of IAG partnerships and what they deliver, but paradoxically many partners were less keen and were not convinced of the added value of having their organisation linked to the IAG website. Only 80 organisations out of the 170 partners in the network have given their agreement to display their information. There were varying levels of commitment from different partners and it was useful to gain agreement up front about the updating of the site.

Evaluation

669 The site was launched in November 2002 and the links to **learndirect** went live in February 2003.

Dissemination

670 The website is available at www.greatermerseyIAG.org.uk. Partnership organisations can (by using a password) update the website in terms of their services and insert articles to the quarterly newsletter. Because the website enhancement enables interactive client referral between partner organisations, this can be shared with other partnerships and LSCs. In addition, the outcomes of referral monitoring have been disseminated to local networks, the IAG partnership steering group, and the LSC.

671 A copy of the project report can be found on the LSC Greater Merseyside website, accessible by following the links from 'Local View' on the national LSC site at www.lsc.gov.uk.

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Case Study 55: East London: Development of a Management Information Database

Purpose and benefits

672 This project was set up to create a CPD guide for IAG managers, coordinators, practitioners and front-line staff.

Outcomes

673 The outcome of the project was:

> a CPD guide for IAG managers, coordinators, practitioners and front-line staff.

Method of delivery

674 The development of a robust MI database for the East London IAG partnerships was the main thrust of this project. It was decided that the best way forward was to purchase an existing database and develop this. As part of the purchase deal, the vendor provided training for key members of staff on the use of the database and introduced the additional coding required to prepare the LSC reports. Discussions between the vendor and the LSC have taken place to ensure that the information added to the database is accurate for the LSC's reporting purposes. Sub-contractors have installed the database, and key members of staff have been trained.

Issues and learning

675 This aspect of the QDF project has been successful. However, as the LSC national office will be developing a database which will be a requirement for all IAG partnerships, there is a danger that this project will be superseded by the national initiative.

Evaluation

676 The IAG partnerships will evaluate the effectiveness of the database in use during 2003.

Dissemination

677 The outcomes of the project are being disseminated through:

> presentations to local partners and IAG networks or steering groups;

> a summary of recommendations and follow-up report, to be forwarded to the LSC national office, other IAG partnerships, and local LSCs; and

> copies of the IAG user manual made available on the local LSC website.

678 A copy of the project report can be found on the LSC London East website, accessible by following the links from 'Local View' on the national LSC site at www.lsc.gov.uk.

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Case Study 56: Nottinghamshire: Database for the Voluntary and Community Sector

Purpose and benefits

679 This project has developed an integrated county-wide electronic information database on voluntary and community sector services and learning opportunities. The project has simplified a way for keeping up to date with voluntary sector activity or provision along with usage measurement, which gives useful data about the use of voluntary organisations.

680 It has had a positive impact with the voluntary sector, as organisations get paid for keeping records and sharing the data. It has also helped to validate the role of the voluntary sector contribution and has promoted joined-up services or information. By having one database accessible from libraries, local arms of the Council for Voluntary Service (CVS) and the LSC it is hoped that there will be better access to IAG information services because people access the database through contact with the voluntary organisation, not necessarily through IAG services. The integrated information available has the potential to add quality of life in a manner not necessarily apparent to the public. It has also assisted voluntary organisations to share data, which is good for inter-sector working.

Outcomes

681 The outcomes of the project were:

> one database used by all to provide up-to-date information about voluntary and community sector activities;

> one database accessed by 400,000 people a year available at the Nottinghamshire Council for Voluntary Services and IAG Pathfinder website, providing information on mainstream and county-based learning;

> 327 existing sites, with an additional six CVSs using the information; and

> an accurate system for data exchange and collation of MI, maintained by CVSs for £2.50 per record.

Method of delivery

682 The project was managed by the ICT manager at the Nottinghamshire Council for Voluntary Services (NCVS), who acted as the communication hub between the LSC, the CVSs and other consortium members.

683 The existing CVS data had to be converted to ensure its compatibility with Nottinghamshire's Opportunities database.

Issues and learning

684 The success of the project was the full cooperation and participation of the voluntary sector, and that was secured by being able to pay each organisation for the inputting time and the data. It helps to seek out the financial incentives early to enable effective routes to be found for overcoming some of the difficulties. The ability to pay for the records raised the importance of the function of the information, helped the organisations to seek out how they currently gain the information, and raised the profile of accurate up-to-date MI.

685 There was a potential problem in that some of the hardware being used within the voluntary sector was old and was not capable of doing the required operations to maintain the data. (It is worth checking out capability of existing hardware early, and it is not advisable to assume that it is up to date.) Options that were considered to resolve this included borrowing equipment from the LSC, finding less out-of-date machines from other employers, or arranging for the voluntary organisations to help each other with transferring data.

Evaluation

686 The project has had a very positive impact upon the voluntary community.

Dissemination

687 The existence of the database and information available was marketed. The software has been made available through the local LSC.

688 A copy of the project report can be found on the LSC Nottinghamshire website, accessible by following the links from 'Local View' on the national LSC site at www.lsc.gov.uk.

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Case Study 57: North Yorkshire: The **learndirect** Ideal Model

Purpose and benefits

689 The background to this project was a concern locally to provide clients with comprehensive and complete information about the full range of learning opportunities available in the area. A key to this was seen as effective collaboration between local IAG providers and the national **learndirect** database. **learndirect** was seen as being good at providing national information but less good at providing useful local information. Many local IAG partners were maintaining local databases that provided more complete information about local provision but did not have the national range.

690 The purpose of this project was to consider the nature and content of an ideal model for providing learning information, reviewing the potential role of both local and national data collection and input, resulting in a proposed ideal model of operation to meet user needs.

Outcomes

691 The outcomes of the project were:

> audit of what was happening currently;

> identification of good practice;

> summary of user requirements in a national database;

> a model clearly detailing the fields required for a national database in order to provide up-to-date, accurate, comprehensive learning information; and

> detailed proposals of suggested responsibilities for local and national data collection, updating, and quality assurance required to provide a coherent and effective system, based on a national database.

692 The main findings from the research were as follows.

> Numerous examples of good practice were found in relation to the operation of learning information provision. This was used to inform the development of the ideal model.

> Extensive user and non-user feedback was ascertained in relation to the type of information required by users, important features of the service and motivation for seeking this information.

> An analysis was carried out in relation to the range and depth of information provision available nationally and in different localities.

> The advantages and disadvantages of local and national provision were considered in detail, with the aim of combining the best features of both into the ideal model.

> The importance of effective web search features on learning sites, the integration of related services to provide economies of scale, and more comprehensive services and investment, particularly in marketing, were consistent themes running through the research findings.

Method of delivery

693 The project was conducted as action research, and consultants were employed to undertake relevant research, mapping and evaluation of what was happening on the ground involving seven local learning information providers. The IAG sub-group of the learning partnerships, and the IAG working groups of the North Yorkshire and York Learning Partnerships provided steering and advisory groups for the projects.

694 North Yorkshire Training Access Points (TAP) was an essential participant in the project and was active in the development of a national model for the delivery of **learndirect** services.

Issues and learning

695 The specific lessons drawn from the research are that an ideal model of operation would include:

> a centrally managed telephone and web-based information service with provision for prompt dispatch of paper-based information;

> a centralised marketing strategy and execution of marketing campaigns to raise awareness of the telephone number and the website address;

> a centrally managed web-based infrastructure for the collection of data with data collection, entry and maintenance to be managed by sub-regional third parties;

> adherence to rigorous quality standards;

> local marketing efforts to be re-deployed to provide field marketing for the central brand;

> the primary telephone service to be delivered centrally with routing to local services; and

> the collation, management and provision of MI to be consistent across all regions and to be fed into both national and local planners.

Evaluation

696 There is already evidence that the local IAG partnership has benefited from increased collaboration and sharing of ideas and experience. This will mean more awareness about what is going on and what opportunities are available for clients, leading to IAG providers referring people more effectively to local services.

Dissemination

697 The results of the research and recommendations have been circulated to the LSC national office, **learndirect**, Jobcentre Plus, and local and national IAG organisations, and have been linked to the national QDF project.

698 The North Yorkshire IAG network newsletter will contain updated reports on project activity for all areas. Regular reports are made to the local steering group, and working groups of the learning partnerships (York and North Yorkshire). Case studies and good-news studies are being integrated into LSC public relations activity as appropriate, and also sent to the national LSC through the quarterly IAG reporting process.

699 A copy of the project report can be found on the LSC North Yorkshire website, accessible by following the links from 'Local View' on the national LSC site at www.lsc.gov.uk.

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Case Study 58: Northamptonshire: A Web Link for Opportunities Post-16

Purpose and benefits

700 This project has provided and improved the provision of information about post-16 publicly funded learning opportunities for young people, adults, employers, business communities and unemployed people. This has been achieved by developing a single web-based point.

701 The benefits of this have been to provide a coherent picture that is easily understood and has easy access for information and learning opportunities in Northamptonshire both for people aged 16–19 years and adults. The system has been developed as a joint venture with all the key agencies in the county that have a responsibility in this area of activity.

Outcomes

702 The outcomes of the project were:

> a single website source of information for post-16 learning in Northamptonshire;

> improved accessibility to information;

> one point of information access across the county linked to the national **learndirect** helpline and the local freephone helpline for IAG;

> a greater awareness among advisers and providers about what is available, and greater access to the information;

> the awareness of a full range of opportunities available among the public and employers;

> training on the new system for all key providers or partners;

> a sustainable web-based structure for future information; and

> innovative ways of developing cluster advice networks around priority sectors, groups and communities has been provided and accessibility has been enhanced.

Method of delivery

703 A multi-agency steering group managed and directed the project. This included the local learning partnership, the local education authority (LEA), local chambers of commerce, Connexions, Jobcentre Plus and two local colleges. The delivery of the project was tendered and was project managed by a consultant.

704 The steering group members provided senior-manager buy-in for the concept in their respective organisations and were able to offer resources to assist the operational delivery of the project. For example, Jobcentre Plus trialled the use of the site with its service users in February 2003 and Connexions agreed to host the server.

Issues and learning

705 Even before the single-point website was accessible, the IAG partnership had reported a consensus that the project work increased participation, and that in itself has demonstrated value to the partners. A strong factor was to consider the sustainability of maintaining up-to-date information after the funding of the project. The project manager involved the partners with an open mind and an eager ear to listen about how to do this, and was able to identify realistic solutions that partners were comfortable in accepting.

706 A central content manager's role was defined, and this will be resourced through a combination of LIF and contributions in cash and kind from the partners. One of the key functions of the content manager, as identified during the pilot project, will be the proactive securing of content update from the provider network in terms of course data, provider profiles and news stories.

707 The scope of whom to include within the website required considerable discussion. The project group decided to focus the site at all the major public training providers only initially. Later on there is an intention for the database to be more comprehensive, whilst making it clear which courses are supported through public funding and are therefore subject to independent inspection.

708 The group would have also ideally wanted more time to get more input from potential users, particularly people with disabilities, to check out more thoroughly some of the assumptions made in the design. With hindsight, the group would have wanted more user involvement right from the start of the project.

Evaluation

709 The measure of success will be an increase in the use of the helpline, increase in the number of hits on the website, and an increase in the number of referrals. It will be possible to track this data by October 2003.

Dissemination

710 Information was disseminated by way of a local launch and publicity of the website through targeted mail-shots to individuals and employers, and plastic wallet cards issued by appropriate agencies such as Connexions (young people), the local IAG partnership (adults), and Business Link (employers).

711 A range of training sessions for key partners, agencies and providers of IAG to assist easy use of the site were held during March 2003 and April 2003.

712 A copy of the project report can be found on the LSC Northamptonshire website, accessible by following the links from 'Local View' on the national LSC site at www.lsc.gov.uk.

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Case Study 59: Somerset: Website Development for Employer Engagement

Purpose and benefits

713 The purpose of this project was to promote a service to employers by offering e-solutions for high-quality and impartial information and opportunities online and to assist local TULRs by providing a web service which would help to bridge the gap between employer and the workplace learner. The objectives were to:

> encourage local employers to participate in IAG in the workplace by developing a Services to Employers section of the Somerset Information, Advice and Guidance Network website with its own colourway and entry portal;

> create a Case Studies section of the website to provide evidence of the value of IAG to employers and TULRs and to gather evidence in order to inform policy-makers;

> create a one-stop shop for employers on the website which would include web-links, downloadable documents, and so on;

> involve at least one major local employer in developing a Business Information page on the website, which would be editable by Network member employers and including links to related sites;

> create a training page, including network training diary and online booking facility;

> develop a group email facility in order to expedite swift communication between groups of network partners. This could lead to an online referral form at a future date; and

> add a members' discussion board to the website.

Outcomes

714 The outcomes of the project were:

> promotion of IAG to employers by offering e-solutions online for local, high-quality and impartial information and opportunities;

> assistance to local TULRs through the web service;

> an interactive, fully functional, employer-friendly service that meets employer needs and offers solutions through IAG network partner organisations;

> a promotional CD or e-business card, promoting IAG, the Somerset IAG Partnership and its website to employers; and

> online member services that add value to the website for the benefit of employers and members.

Method of delivery

715 These outcomes were met by contracting out the work to design the website and its content. This included designing and delivering:

> a training page to enable employers and TULRs to use the site;

> resources and case studies web pages;

> publicity materials;

> a news and events archive;

> a TULRs' message board; and

> an employer liaison coordinator, who assisted with the promotion of the website to local employers, which has had an impact on the delivery of IAG within the workplace.

Issues and learning

716 This project has given the Somerset IAG Partnership a sound basis for further consolidation of IAG work with Somerset employers and has opened a whole new avenue for engagement.

717 It is important to have good contacts with local employer link organisations. Trade unions, Business Link and the LSC workforce development team are key partners. The time spent by the Somerset IAG Partnership team in developing these relationships and selling the benefits of collaboration was time well spent.

718 It is easy to underestimate the cost. The CD or promotional e-card was more expensive than had been initially thought, so funds were contributed from other sources and the resulting CD became more generic in its applicability.

Evaluation

719 The impact of the project so far has been to raise the profile of IAG with local employers and provide a basis on which information on the website can be developed further to suit employers' needs. In addition, it has given the TULRs recognition and an additional means for communication. The CD will be presented to existing employer affiliates and TULRs to gauge feedback.

720 Future impact will be assessed through a questionnaire to gather information from local employers in respect of the content of the web pages.

Dissemination

721 The results of this project are being disseminated through:

> the project evaluation report;

> IAG national and local conferences;

> the Somerset IAG Partnership website;

> local newsletters;

> network meetings;

> a CD or e-business card; and

> an employer information pack.

722 A copy of the project report can be found on the LSC Somerset website, accessible by following the links from 'Local View' on the national LSC site at www.lsc.gov.uk.

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Section 6: Research into the Impact of Information Advice and Guidance with Adults

Case Study 60: Cambridgeshire: Researching Value

Purpose and benefits

723 This project has tracked 138 people (from a pool of 150) across five IAG partnership areas. They all received guidance five years ago, and the research aimed to establish evidence of the long-term effects of the interventions with adults. This information will be used in influencing the targeting of local provision.

724 A spin-off for the project was the informal morale boost it provided by being able to evidence the real-life impact of IAG over time for those delivering it. It has also assisted previous service users to return.

725 The people were selected to represent a range of different client groups, which include:

> women (including women returners);

> the local LSC area, which includes people in rural areas;

> people from socially disadvantaged areas;

> people with mental health problems and physical disabilities returning to employment and training;

> unemployed people and those in low-paid work; and

> people who have not gained from learning in the past or have not done any learning for some time.

Outcomes

726 The outcomes of the project were:

> 150 clients were contacted and 138 replies were received (a 92% response rate); and

> evidence from the client contact was themed to show positive and negative aspects of the interventions.

Method of delivery

727 A Cambridgeshire and Peterborough network member was contracted to undertake the research and report.

Issues and learning

728 Five years after receiving guidance, 60% of the sample were self-employed or in employment.

729 The longer-term effects of IAG interventions were demonstrated through 36 case studies. These illustrated the range of typical client experience and the value attributed to confidence-building, help with interview techniques and writing CVs, psychometric testing, and the value of voluntary work and work experience as a route back to work and personal fulfilment. The case studies also illustrate the realities of life in that people's circumstances change, which prevents them from realising their ambitions.

730 Whilst personal circumstances and health combine to form the major barriers to moving on into learning and work, lack of confidence is highly significant, as are finance, childcare, age and lack of relevant skills.

731 Responses to open questions showed that elements of the guidance process had given clients more confidence to enrol on courses, apply for jobs, or start a business. In particular, preparation of a CV, advice and support, and reinforcement of capabilities were cited as being most valued. Many of those contacted were eager to talk, with 34 asking for further help, showing a continuing sense of involvement and commitment.

732 This opportunity for reflection and assessment has enabled guidance providers to look back at the service they offered between three and five years ago and note the significant changes that have occurred over that period. In particular, they have noted the limited scope of the data collected then, which has caused some difficulties with the research, compared to the extensive data kept now. One provider stated: 'It is apparent that we now run a far more coherent professional service across the city and are accessible to a far wider range of people'.

Evaluation

733 A presentation in March 2003 to the IAG partnership management board outlined the findings along with a retrospective review.

Dissemination

734 Locally the results were published in March 2003 and available to all local IAG partners along with a report to both learning partnerships. The project was showcased at the Market Place as part of the National IAG Conference. The report was discussed in workshops, and its findings were analysed. The report was shared locally with the other IAG partnerships in the Eastern region through the regional managers' group, and nationally through the national LSC, NICEC, and an article written for the NAEGA journal. Workshops will be held at both the NAEGA conference in June 2003 and the Institute of Careers Guidance in September 2003, which will bring the results to the attention of practitioners.

735 A copy of the project report can be found on the LSC Cambridgeshire website, accessible by following the links from 'Local View' on the national LSC site at www.lsc.gov.uk.

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Case Study 61: Derbyshire: Evaluation of Information Advice and Guidance Impact

Purpose and benefits

736 This project evaluated the effectiveness of IAG activities and performance. Three stages of evaluation were used: desk research, telephone interviews and email questionnaires.

737 The benefits of this have been to confirm the strength of the existing delivery model and also the identification of eight improvement areas, to assist continuous improvement. The recommendations were then fed into the new marketing approach for IAG for 2003/04.

Outcomes

738 The outcomes of the project were:

> strengths and weaknesses of the IAG programme identified;

> key areas for improvement activity designated: communication, training, mechanisms for dissemination, more flexible delivery, new branding, strategic positioning, and marketing;

> focused evaluation of the guidance element and its role in widening access and participation; and

> intelligence obtained to inform provision under new co-financing arrangements.

Method of delivery

739 This work was contracted out and the IAG partnership coordinator contract-managed the project.

Issues and learning

740 There was a poor response rate to the email survey, and it probably would have been more effective to have allowed a longer time for people to reply. The telephone survey proved to be more productive. A key issue for the IAG partnership was that its membership had grown rapidly and communication mechanisms needed to be geared up to match the requirement for information. The evaluation report was used as part of the executive board's away-day in April 2003 to assist with strategic development.

Evaluation

741 The report was available in January 2003 and its executive summary was included at subsequent network meetings. The findings of the report were used to shape future strategic decisions.

Dissemination

742 The report was shared regionally and locally through circulation to involved parties and was available through the website (www.diag.org.uk).

743 A copy of the project report can be found on the LSC Derbyshire website, accessible by following the links from 'Local View' on the national LSC site at www.lsc.gov.uk.

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Case Study 62: Greater Merseyside: Career Coaching Resource

Purpose and benefits

744 This project has evaluated the impact and lessons learnt from using a highly innovative career coaching resource over the last three years. The resource was originally created by the Northwest Development Agency, the DfES, Greater Merseyside LSC and Greater Merseyside IAG Partnership, and was known as the Windmills Programme.

745 The project evaluated client measures of impact from the Windmills programme with unemployed graduates, women, and under-employed young professionals. Case study examples have enabled self-directed resource material to be improved and interactive learning resources have been professionalised.

Outcomes

746 The outcomes of the project were:

> impact evaluation demonstrated the range of measures of the impact of IAG on 50 diverse clients;

> benefits of IAG across four client groups shown by eight in-depth case studies;

> 160 Greater Merseyside IAG providers benefited from a self-directed career coaching resource covering seven open-learning modules (motivation, visioning, fitness and employability, work–life balance, action-planning, networking, and impact measurement);

> 25 careers practitioners trained;

> 50 individuals across four different client groups piloted the new Windmills resource;

> 180 national providers and policy-makers received the new improved Windmills resource; and

> partnership links between HE and IAG networks improved.

Method of delivery

747 LSC Greater Merseyside contracted with Liverpool University to lead and manage the project. The project had a number of key partners: Greater Merseyside IAG Partnership, Greater Merseyside Connexions, a consultant on career coaching, a local SME providing design and production, the Guidance Council, and an advisory group of career management specialists.

Issues and learning

748 When the resource pack is being used as a tool with clients it seems to be more effective if advisers have applied the tools and exercises to their own development. This gives deeper understanding of the effect of the activity and how it can assist clients' thinking. Also, modelling development is a powerful way for the clients to see the pack's effectiveness.

749 The resource pack can be viewed as a general resource pack for life and not just about one aspect of life (career development). By looking at the whole person through the four areas of work, learning, playing and giving, people seem to be able to make more informed choices about what they are best suited to.

750 The area that has often stimulated people with good results has been to examine how they 'give' or put back into their environment or community. This helps people think more laterally about their skill sets and often fulfils an aspect of satisfaction that may be missing in other parts of their life or work.

751 There is a need to develop a national career structure and development route for advisers. The skills now being required are a blend of coach, guide, creative resource and pragmatic action-planning and seem to cut across various skill areas to differing depths.

752 There is also a need for a coordinated formal product development group to help advisers maintain their creativity and development. It is helpful to get like-minded people together to keep innovation at peak flow, because in stressful and stretching times it becomes easy to lose innovation.

Evaluation

753 The case studies provide a powerful evaluation of how the resource pack, activities and interventions can assist development.

Dissemination

754 The dissemination was local and national. At the local level, a highly interactive 'train the trainers' programme was delivered within the Greater Merseyside area. All the new resources were integrated into the programme. At the national level, over 100 partners were targeted, including the key policy-makers (the DfES, the Department for Trade and Industry (DTI) and the LSC), IAG providers, HE institutions and employers.

755 The new resource pack was distributed to each delegate at the National IAG Conference in February 2003. Some of the tools within the pack were used and demonstrated in a presentation at the same event.

756 A copy of the project report can be found on the LSC Greater Merseyside website, accessible by following the links from 'Local View' on the national LSC site at www.lsc.gov.uk.

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Case Study 63: Lincolnshire and Rutland: Tracking Clients

Purpose and benefits

757 This project had two parts in measuring the value of IAG. Part 1 tracked clients who had used IAG over a 12-month period from April 2001 to March 2002. Part 2 developed a tool to assist IAG providers to measure the value and benefit to the individual of receiving IAG services.

758 The tracked clients were a representative sample over the whole year and included people from target groups such as the unemployed, those living in rural areas, and those aged 45 and over. The measurement tool was developed by the Centre for Guidance Studies at the University of Derby, using previous research conducted at the University of York.

759 The rationale for this project was to test and compare two methods for measuring the impact of IAG services on individuals.

Outcomes

760 The outcomes of the project were:

> quantitative data about the number of people who have used IAG services between April 2001 and March 2002 and then assessing their progress towards accessing education, training and employment; and

> the development, implementation and evaluation of a measurement tool that assesses the value of the IAG in terms of its contribution to the individual's quality of life.

Method of delivery

761 Part 1 was undertaken by Connexions Lincolnshire and Rutland, which identified a representative sample of people who had accessed IAG, then surveyed them by questionnaire. This was followed up by a telephone discussion with 50% of those who did not respond to the questionnaire.

762 Part 2 was undertaken by the Centre for Guidance Studies at Derby University in conjunction with the Lincolnshire and Rutland IAG Partnership. A local group was set up that included representatives from the Lincolnshire Action Trust, Lincoln College, and a division of Connexions Lincolnshire and Rutland.

Issues and learning

763 Part 1 included an individually tailored questionnaire; while Part 2 involved a telephone follow-up of 50% of non-respondents. The overall response was a disappointing 20% of the original sample. This meant robust statistical analysis was not possible. One possible reason for this was the time lapse between the individual having accessed the service and the survey being carried out. However, it was noted that the response from people who had accessed services that involved the intervention of an adviser offering guidance and advice was higher than from those that had used information only.

764 Part 2 of the project involved the design, production and testing of an assessment tool to measure the impact of advice and guidance on the individual's quality of life. The project aimed to use the tool with 100 clients. The initial contact with the clients was fairly straightforward; however, making the second contact proved to be more problematic and about 20% of the sample group could not be contacted a second time. This meant that the data was, for those people, incomplete. If this study were to be repeated in the future, one possible solution would be to make a second appointment for the client, rather than relying on being able to conduct a second contact by telephone.

Evaluation

765 As part of this project, the measurement tool will be trialled with a sample of IAG practitioners. The findings of the trial will be evaluated and submitted to the IAG partnership management group.

Dissemination

766 The report for Part 1, which includes the results from client tracking, will be given to local and national LSC, partner providers and members of the steering group of the IAG partnership, the DfES, the Guidance Council and GAB.

767 The results of Part 2 will be shared with GAB and Connexions Lincolnshire and Rutland in April 2003, and with the national LSC office.

768 A copy of the project report can be found on the LSC Lincolnshire and Rutland website, accessible by following the links from 'Local View' on the national LSC site at www.lsc.gov.uk.

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Case Study 64: Wiltshire and Swindon: Evaluation of Services to Individuals

Purpose and benefits

769 IAG services are frequently asked to demonstrate their impact and effectiveness. Often such questions are hard to answer because of a lack of hard data. This project was set up to provide data and a process for collecting them. Specifically, the project would sample adult IAG clients to establish the impact of the information and advice provided by outreach staff employed through the Wiltshire IAG Partnership. The findings would be used to document the influence of information and advice provision, highlight successes and to clarify areas for improvement in practice.

Outcomes

770 The outcome of the project was a project report presenting an analysis of the results of the research.

Method of delivery

771 Initially, key stakeholders and members of the IAG partnership were contacted about the information they would like to obtain from the project. This guided the measures incorporated in the study so that report outcomes were relevant to different audiences. A consultant with expertise in occupational psychology was appointed to develop a research tool that would measure the 'distance travelled', or changes in confidence of actions taken by clients using IAG services.

772 A process was agreed, involving a number of aspects.

a Client case studies that had previously been collected would be collated to provide information on advice and information issues arising.

b Meetings would be arranged with outreach IAG staff to consider the range of advice and information situations encountered, and perspectives on reasonable expectations for the impact of these.

c A framework would be drawn up of categories of advice or information intervention (five key categories, for example) and focal outcomes.

d Standardised questionnaires relevant to client outcomes would be created.

e Additional questionnaires to supplement these would be designed and piloted.

f Outreach staff would be trained to use the questionnaires.

g Data would be collated from:

> each client pre-interview questionnaire completed (records the client goals and relevant self-assessments);

> short post-interview questionnaires completed by outreach staff (categorising interview type, information and advice given in summary);

> client post-interview evaluation questionnaires; and

> two-month follow-up questionnaires (and/or telephone interview).

h Focus groups would be arranged to discuss issues about the advice and information process.

i Outreach staff focus groups would discuss observations during the period.

Issues and learning

773 The use of the questionnaires successfully generated information about the positive impact of IAG services. Clients were positive about filling in the forms and cooperated with the research process. However, it was a challenge to obtain a representative sample and more thought needs to be given to ways of identifying and involving clients with basic skills needs.

774 IAG staff needed to organise their client sessions and interviews to enable clients to complete the research questionnaires. There were also difficulties in the recruitment and retention of IAG staff, which has a negative impact on the availability of IAG services in Swindon and Wiltshire.

Evaluation

775 The impact of the project so far has been the use of the data collected through the research into the business planning process of both the local LSC and the IAG partnership. The data will also be used the inform the training and development of IAG staff.

776 The final report includes analyses of:

> the prevalence of presenting advice and information needs;

> changes between before and after interviews on relevant measures;

> changes between before interviews and the two-month follow-ups on relevant measures;

> reported actions (such as further information requests, course contacts, and so on) over a two-month period;

> outcomes by advice and information category; and

> distribution by client type (employment status, and so on).

Dissemination

777 A project report including copies of the questionnaires and an analysis of the project findings has been published and distributed to key organisations including:

> the full range of IAG networks;

> national and local LSCs;

> the DfES;

> the Guidance Council; and

> GAB.

778 The report is on the Steps to Learning website (www.steps-to-learning.org.uk).

779 The local press has been used to disseminate good news about the benefits of IAG services, and presentations have been made at local, regional and national IAG events and conferences.

780 A copy of the project report can be found on the LSC Swindon and Wiltshire website, accessible by following the links from 'Local View' on the national LSC site at www.lsc.gov.uk.

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Section 7: Developing Information Advice and Guidance Staff

Case Study 65: Birmingham and Solihull: Fast-track Programme for the National Vocational Qualification in Advice and Guidance

Purpose and benefits

781 This project has trialled a fast-track model of entry into IAG organisations to help individuals from as wide a range of backgrounds as possible to work in the IAG occupational area. It has assisted individuals to become effective potential adult guidance staff and be ready for the IAG job market within nine months of starting the placement programme. This has been achieved through a mixture of work-shadowing and mentoring, a full-time work placement (with bursary) and studying for a recognised qualification (the NVQ in Advice and Guidance at Level 3). This method offers wider access to the IAG field of work as it is not simply focusing upon arduous entry qualifications and work-based experience, which can limit some candidates at the selection interview.

782 The benefit of this has been to apply IAG principles to attract more people into the IAG job market, thereby promoting the value of IAG services both to individuals and employers. By offering access to work taster-days, placements and paid training it widens the potential pool of guidance staff.

783 The project has attracted individuals from under-represented groups, voluntary workers, employed people seeking career changes, long-term unemployed and those on New Deal. The placements were heavily oversubscribed, and the standard of applicants was high. The overall impact has been to raise awareness of IAG services and their benefits. The project has also assisted with recognition of the value of the voluntary network within the local community as a route to employment in the longer term.

Outcomes

784 The outcomes of the project were:

> awareness-raising in the employment market of IAG opportunities;

> 300 information packs requested;

> over 200 people attended community-based awareness-raising sessions;

> 100 people from 15 organisations took part in structured work taster-days in small groups;

> 20 people undertook structured work-shadowing;

> 10 people began work-based fast-track training and received training bursaries; and

> eight people were offered employment in the network.

Method of delivery

785 Connexions managed the project through the IAG network coordinator. The delivery of the NVQ at Level 3 was tendered and awarded to Connexions Solihull. Practical support and mentoring of work placements was contracted out. The IAG network contracted with network members to provide training placements. The Careers Education Business Partnership provided financial management.

786 The process involved advertising in the local media, job centres and the network. Two days were chosen for drop-in sessions at the central libraries, and more than 300 people attended (double the target).

787 The project was commissioned to run between July 2002 and September 2003.

Issues and learning

788 It was useful to be very specific about the selection criteria in advance, although even with this, the demand was so great for work-shadowing placements that applicants had to be shortlisted. Those who were unsuccessful at that stage have been offered either voluntary work or IAG services for themselves.

789 There was a potential danger of drop-out from the final 10 that were chosen to do the NVQ and training, so support mentoring and guidance were provided by an experienced organisation during the training placement. Trainees were encouraged to discuss any potential problems as soon as they arose. Arrangements were also made for individuals to start the training at a later stage if they needed to.

790 The project timescale was very tight and in hindsight required about a third more administrative time than was originally envisaged.

791 The project was inspired by good practice in other industry sectors (such as the health service). The use and involvement of team skills contributed towards the project's success.

792 In addition, the support from the network made a big difference to the outcomes being achieved because the project was funded and was addressing real needs, meaning that the benefits were tangible reasonably quickly.

793 Interest in the project has far outweighed capacity, and IAG's profile in the local community has successfully been raised.

Evaluation

794 Progress against the project plan was reported at the regional IAG coordinators' group and at the regular briefing updates at IAG network scheduled meetings. Follow-up is planned for 12 months hence to find out the progress of each trainee. This is to be reported at local and national IAG networks.

Dissemination

795 A presentation was made to the network involving the participating trainees. Specific feedback about the success and progress of the trainees went on the IAG partnership website.

796 A copy of the project report can be found on the LSC Birmingham and Solihull website, accessible by following the links from 'Local View' on the national LSC site at www.lsc.gov.uk.

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Case Study 66: Devon and Cornwall: A Multi-agency Training Model

Purpose and benefits

797 This project was developed in conjunction with the Devon and Cornwall IAG Partnership, building on the training activities planned in the 2002/03 IAG delivery plan. The plan was to address the issue of creating sustainable high-quality training for 150 partners across two counties on a limited budget.

798 The project aimed to provide training and improve working arrangements with all key providers within the Devon and Cornwall IAG Partnership. For example, **learndirect** offers its own training to all Devon and Cornwall IAG Partnership staff at 34 centres, and the Devon and Cornwall IAG Partnership reciprocates by offering training to **learndirect** staff. Through this reciprocal arrangement, skills and specialist knowledge are spread across the network.

799 Specifically this project aimed to:

> expand the multi-agency training approach in Devon and Cornwall;

> develop the model so that it would be possible to promote a national expansion of the multi-agency training concept;

> offer more staff the opportunity to develop their own skills across IAG partnerships by using specialists from other member organisations;

> consolidate a structure for delivering the model;

> provide a sound methodology to promote the cross-organisational benefits of this type of training;

> promote the sharing of specialist knowledge and skills; and

> provide a framework to meet IAG national training needs for all partners in a cost-effective way.

Outcomes

800 The outcomes of the project were:

> 50 additional planned training courses were provided in Devon and Cornwall, involving a minimum of 350 participants;

> a set procedure and training manual were developed for other IAG partnerships across the country to take advantage of the concept;

> a website was developed to support the sharing of training opportunities across local and national boundaries; and

> a national conference and six regional workshops were organised, with invitations to all IAG partnerships and 200 key IAG staff involved.

Method of delivery

801 The project was contracted to Connexions Devon and Cornwall, the lead partner of the Devon and Cornwall IAG Partnership. The project was managed and delivered by the IAG training coordinator, who also provided consultancy support to other IAG partnerships, and supported by a multi-agency training coordinator and a half-time administrator. The IAG partnership manager provided termly progress reports to the IAG strategic planning group. The training coordinator worked with local providers to develop training across the area. This included:

> the circulation and analysis of 600 questionnaires to analyse training needs;

> checking this information against basic skills needs and the **matrix** Standard to develop a competency framework;

> the creation and dissemination of information to partners about 'specialist' skills;

> developing a checklist for staff to encourage CPD;

> setting up an induction programme for all new IAG staff;

> promoting Open College Network Accreditation for core skills through the skilled adviser course; and

> advertising all course opportunities on the Devon and Cornwall IAG Partnership website and through mailings to partners.

Issues and learning

802 It is important for an IAG partnership representative to be seen at each course, particularly in the beginning, in order to indicate the importance of the training to participants. A strong relationship is also required between the coordinator and the trainers, that values their contribution and skills.

803 Organisers must avoid lost causes but bend over backwards to get courses off the ground. It may be necessary to run with small groups to begin with to kick-start the process.

804 It is important to have a clear administrative model with a critical-path flow chart and a written structure. It is dangerous to assume that information is getting to the right people – check and re-check.

805 The quality of courses must be monitored and action taken to ensure high standards are maintained.

Evaluation

806 There is clear evidence that there are real potential benefits to IAG partnerships in the multi-agency approach used. The Devon and Cornwall IAG Partnership now has over 75 courses operating across Cornwall and Devon, which are free to members of the Devon and Cornwall IAG Partnership.

807 So far, 200 key staff have been trained and informed about the use of the model, which could create up to 2,000 free training sessions across the IAG partnership. This could quickly produce a more highly skilled IAG workforce in a very cost-effective way if introduced nationally.

808 The future impact of the programme will be assessed through:

> continued use, evaluation and development in Devon and Cornwall;

> further use and development of the website;

> discussion relating to the setting-up of a national IAG training forum;

> ongoing communication with IAG partnerships arising from the workshops; and

> consideration of another QDF bid to disseminate the model further.

Dissemination

809 Locally, details of the training opportunities available in Devon and Cornwall have been made available on the Devon and Cornwall IAG Partnership website and through the five local operational delivery groups. The training coordinator provides feedback on the outcome of the project to these groups and to the strategic planning group.

810 Regionally, the project will be discussed at the South West IAG forum, which meets termly, which comprises the six local LSCs from the south-west area, and which also involves the IAG partnership managers.

811 Nationally, information on the multi-agency training approach has been disseminated through a national conference and six regional workshops for IAG partnerships. A website has been established and a hard copy of the training manual sent to IAG partnerships.

812 Information about the project has been made available on the website (www.martintraining.info) and the Devon and Cornwall IAG Partnership website (www.go4lw.co.uk).

813 A copy of the project report can be found on the LSC Devon and Cornwall website, accessible by following the links from 'Local View' on the national LSC site at www.lsc.gov.uk.

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Case Study 67: Greater Merseyside: Performance Management Training

Purpose and benefits

814 This project enabled the Greater Merseyside IAG Partnership to develop and deliver training on performance management to 20 delivery partners. It focused upon the contractual requirements of the Greater Merseyside IAG Partnership delivery process, concentrating on required returns and MI requirements.

815 The benefits of this have been a wider understanding of the contractual requirements for IAG delivery funding and the purpose of the MI returns.

Outcomes

816 The outcomes of the project were:

> all 20 delivery partners accessed performance management training;

> contractual requirements understood and signed up by each delivery partner;

> concept of how MI could be used in relation to continuous quality improvement accepted by partner members;

> performance management structure was developed; and

> monitoring and continuous quality improvement processes developed for IAG service delivery in 2003-04.

Method of delivery

817 The consultant developed a training package based on an existing IAG partnership delivery model. The consultant delivered the training with the IAG partnership manager and coordinators, and evaluated activity from participant feedback, proposing future monitoring and continuous quality improvement development activity. The consultant also developed a generic model of the training activity (in other words, one that is not specific to Greater Merseyside IAG Partnership's delivery) for use with other IAG partnerships.

Issues and learning

818 The performance management training proved to be extremely valuable in reinforcing the need for consistency in the way the funding is drawn down. Clearer understanding was evident where both the contract manager and IAG practitioner attended the training.

819 Consideration needs to be given to the processes for involving new or replacement delivery staff partway through the contractual year.

820 The introduction of an audit process to support project management has proved to be a positive learning experience for the provider and the IAG partnership team.

Evaluation

821 The evaluation of the training outlined some key messages. The feedback from providers delivering services under the IAG delivery contracts will inform future planning and development. For example, the system for delivering project management training will be embedded at the start of each contract year, and a parallel system of auditing delivery contracts for the purpose of supporting delivery partners and identifying weaknesses in the system will also be put in place.

822 Work is planned with partners to identify best practice in internal administration systems, which will support other providers.

Dissemination

823 The Greater Merseyside IAG Partnership steering group, six local networks, six local learning partnerships and the local LSC receive quarterly feedback on delivery outcomes and related MI.

824 The performance management training package has been offered, on a generic basis, to all of the Greater Merseyside IAG partner members not involved in delivery.

825 A copy of the project report can be found on the LSC Greater Merseyside website, accessible by following the links from 'Local View' on the national LSC site at www.lsc.gov.uk.

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Case Study 68: Lancashire: Development of Leadership Skills

Purpose and benefits

826 The aim of this project was to improve the quality of provision through achievement of a consistent level of leadership across the whole IAG network in Lancashire by developing the leadership skills of the managers of partner organisations.

827 There was an awareness that in many partner organisations, IAG was not given the importance it needs to be successful. There was a need for people who would lead, develop and promote the vision of IAG across the IAG partnership.

828 Initially, 19 leaders participated in the leadership programme and eventually the plan would be to extend this to all the 50 organisations that are members of the IAG network.

Outcomes

829 The outcomes of the project were:

> a leadership training programme for 19 senior IAG managers. An essential part was an emotional intelligence diagnostic tool to enable managers to identify their leadership strengths and areas for development;

> norms established for the delivery of IAG;

> a performance management process and competency framework introduced across the network to meet national standards. Managers received training in conducting performance management meetings and processes;

> learning tools and support materials for staff, including good practice case studies, collected and disseminated;

> managers achieved accreditation to observe and assess staff working towards NVQs;

> multimedia presentation for training staff; and

> project report produced.

Method of delivery

830 The project was managed jointly by the LSC and the IAG network manager. A coordinator was appointed to give strategic leadership and to run the project on a day-to-day basis. The leadership development programme was led by a consultancy, and the workshop by the Centre for Guidance Studies. An introductory workshop was held for network member managers to explain the rationale and project programme.

831 Workshops for IAG practitioners were held across the area to engage practitioners in establishing a norm for what IAG actually means. A three-day residential workshop for managers was also arranged, which included:

> leadership development;

> moderation of norms developed by practitioners;

> performance management, including revision of the competency framework and its associated documentation;

> assessment and identification of relevant training needs;

> the opportunity to sign up for accreditation, if appropriate; and

> an explanation of, and sign-up for, coaching support.

832 A coaching programme for managers provided one-to-one support to help managers through the training and assessment process, building on learning from the residential workshop.

833 The competency framework, already developed by the IAG network, was revised in order to ensure it fitted the requirements of the **matrix** Standard and network members. An audit against the **matrix** Standard was held to determine staff competence, and understanding of IAG and performance management processes.

834 Training towards accreditation was organised for managers who undertake observational assessments of their staff against the competency framework.

835 External assessors undertook observational assessments in order to ensure that consistency was in place, and provided feedback to network managers.

836 A learning package was produced for use by other networks. In addition, a multimedia presentation was produced, for use at events, that will clearly demonstrate the project, its processes and outcomes to interested parties.

Issues and learning

837 Early evidence shows that the concentration on leadership skills is highly effective at bringing about a clearer focus within the IAG network and an effective way of making change happen.

838 A three-day residential course was effective in covering a lot of ground quickly, and it built on relationships across the network. Participants felt that the project significantly improved understanding about IAG across the county. The extension of this approach to more reluctant managers and IAG organisations may be a challenge in the future.

Evaluation

839 The project was evaluated through various activities, which are described in the final report, which shows the effect of the project from a 'before and after' point of view.

Dissemination

840 Information about the programme was presented through:

> IAG network meetings, newsletter and members' website;

> monthly updates to the LSC national office;

> press releases;

> an e-letter to subscribers (local LSCs, IAG network managers, learning partnerships and others); and

> North West regional IAG network manager meetings.

841 On completion of the project there has been:

> circulation and publication of the final report;

> workshop presentations at relevant events;

> promotion of learning tools;

> promotion of good practice case studies;

> press work; and

> articles in the professional media.

842 A copy of the project report can be found on the LSC Lancashire website, accessible by following the links from 'Local View' on the national LSC site at www.lsc.gov.uk.

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Case Study 69: East London: Work-to-Train and Peer Mentors

Purpose and benefits

843 The purpose of this project was to build IAG capacity in Hackney, Tower Hamlets and the City of London with particular emphasis on the accreditation of advice and guidance practitioners to the NVQ in Advice and Guidance at Level 2, Level 3 and Level 4.

Outcomes

844 The outcomes of the project were:

> the identification and recruitment of 12 mentors;

> the instigation in November 2002 of their training towards an NVQ in Advice and Guidance at Level 3;

> the peer access team informed young people of the transition from Connexions to IAG, thus creating a seamless service; and

> peers trained to obtain the NVQ in Advice and Guidance at Level 3 by December 2003.

Method of delivery

845 Consultants were commissioned to undertake the training of the peer access team. The training began in January 2003 with 12 peer mentors. Members of the peer access team have being working with mentees to raise the profile both of Connexions among young people and also of the transition from Connexions to IAG provision. It was felt that by making training relevant to IAG practitioners, the transition from Connexions would be made smoother.

846 The training took place over 12 weeks and was delivered at a local centre. The team received an allowance of £5 for attendance, and £10 when undertaking their placements. Placements were negotiated with various organisations, and included careers management and workplace link organisations.

Issues and learning

847 There have been difficulties in recruiting peers, and difficulties in getting them to attend workshops. However, the £5 attendance allowance made a significant difference in attendance. This has been a positive feature, as the young trainees enjoy the class and when they do attend are very motivated and keen.

Evaluation

848 Evaluation will take place on completion of the course in January 2004. Ongoing training evaluation takes place following each training session.

Dissemination

849 The outcomes of the project are being disseminated through:

> presentations to local partners and IAG networks and steering groups; and

> a summary of recommendations and follow-up report to the LSC national office, other IAG partnerships and local LSCs.

850 A copy of the project report can be found on the LSC London East website, accessible by following the links from 'Local View' on the national LSC site at www.lsc.gov.uk.

Further information

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Case Study 70: North Yorkshire: Information Advice and Guidance Training Programmes

Purpose and benefits

851 The purpose of this project was to map competence-based courses offered by IAG networks and the TUC's Learning Champions Programme in Yorkshire and Humberside, and to recommend coherence and progression routes within IAG training.

Outcomes

852 The outcomes of the project were:

> a description of the local or regional IAG course provision available, highlighting similarities and differences, and comparing the content of TUC courses with other provision; and

> recommendations about issues to be addressed in order to ensure coherence and progression, with implications for a national programme of staff training and development.

Method of delivery

853 Fieldwork research was undertaken by consultants, and the findings presented in a report. The IAG sub-group of the learning partnerships and the IAG working groups of the North Yorkshire and York Learning Partnerships provided steering and advisory groups for the projects.

Issues and learning

Meeting learning needs

854 Training and development opportunities that address the subjects of promoting learning and successful outreach working should be thoroughly developed and offered within the network as soon as possible.

855 Learning opportunities should be resource-based and backed up with high-quality support provided by a specialist tutor. In the longer term, other IAG learning should be made available in the same way.

856 It is recommended that the LSC and the York and North Yorkshire IAGP should explore without delay the feasibility of developing this type of flexible learning. If this new flexible learning programme proves to be impracticable or inappropriate, additional modules should be designed to run in tandem with the existing programme. The existing programme will be reviewed in the light of these recommendations.

857 Development should be led by an experienced team of learning programme developers and should make maximum use of existing resources and the expertise that exists within the IAG network.

Qualifications

858 Employers of IAG staff should review the staff roles against the national occupational standards and other criteria. Where a need is established, the member of staff should be given the appropriate learning opportunities and should be required to achieve an NVQ at Level 3. The IAG network could make this recommendation a matter of policy.

859 Employees who do not need an NVQ at Level 3 should be required to achieve a full NVQ at Level 2. As a matter of policy, all IAG employees should achieve the appropriate NVQ within a reasonable period of entering employment as an IAG member of staff.

Contribution to the learning and skills of information advice and guidance staff

860 The York and North Yorkshire IAGP should consider conducting a survey of members to identify learning needs, which should then be met through formal training. There is also work needed towards ensuring the availability of external learning opportunities that support IAG staff development and progression for member organisations that are too small to offer comprehensive internal training.

861 The network should consider establishing a mechanism for reviewing:

> the information management processes;

> the support available from within the IAG network; and

> the procedures and skills that are appropriate for outreach and project workers in managing and using information.

862 All IAG staff should be encouraged to learn ICT skills and obtain an ICT qualification. Partners should also review their approaches to the development, assessment and continuous updating of local knowledge in their IAG staff.

Information advice and guidance projects

863 Project proposals and plans for initiatives must demonstrate the source of appropriately skilled staff and/or that the necessary training will be available from the outset.

Recommendations for other bodies

864 Consideration should be given to developing a qualification to accredit the required knowledge and skills of promoters of learning, outreach staff and learning champions.

865 Consideration should be given to drawing the attention of the responsible national bodies to these findings and to promoting the case for appropriate action. Actions might include:

> providing a copy of the report to the team managing the national QDF project developing learning resources;

> inviting the Guidance Council, and other bodies that can exert the appropriate influence, to widen the definition of IAG to include the activities required for promoting learning; and

> inviting the local sector skills council to include consideration of the development of national occupational standards for promoting learning when the standards are next up for review.

866 The concerns over assessment of knowledge should be communicated to the sector skills council for consideration when the NVQ is next reviewed.

Evaluation

867 The project will be evaluated through a forthcoming comprehensive review of the York and North Yorkshire IAG Partnership.

Dissemination

868 The results of the research and recommendations have been circulated to the LSC national office, **learndirect**, Jobcentre Plus, other local and national IAG organisations and linked to the national QDF project.

869 The North Yorkshire IAG network newsletter will contain reports on project activity for all areas. Regular reports are made to the local steering group, and working groups of the learning partnerships for York and North Yorkshire. Case studies and news stories are being integrated into the local LSC's public relations activity as appropriate, and are sent to the national LSC through the quarterly IAG reporting process.

870 A copy of the project report can be found on the LSC North Yorkshire website, accessible by following the links from 'Local View' on the national LSC site at www.lsc.gov.uk.

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Case Study 71: Somerset: Information Advice and Guidance Mentor Training

Purpose and benefits

871 The aim of this project was to evaluate the potential for, and develop, an IAG volunteer mentor training scheme. Volunteers were to be trained to deliver support to young disadvantaged adults in Somerset. The specific aims of the project were to:

> carry out a comprehensive audit of existing volunteer mentoring schemes including information on the host organisation, identification of existing personal support resources, mentor training used, and client target groups;

> identify best practice;

> develop a pilot IAG volunteer mentor training programme in a format that can be used by other voluntary or community organisations within the Somerset IAG network; and

> identify and recruit potential volunteers for the course.

Outcomes

872 The outcomes of the project were:

> a record of existing volunteer mentor schemes; and

> the development of an IAG volunteer training programme, which is to be delivered initially to volunteers attached to the Foyer project, but that is also suitable for use with professional staff.

Method of delivery

873 A research company was engaged to take forward the project. The initial research was designed to establish an understanding of the role of the organisations currently employing mentors, including a simple understanding of background, aims and objectives, and the individuals that made up the client target group. This information was used to classify the variety of different organisations that provide IAG to disadvantaged individuals in the Somerset area.

874 The research focused on:

> what motivates an individual to become a mentor;

> how host organisations recruit mentors;

> the variety of methods and of screening techniques employed and their relative success;

> identifying the variety of different training techniques, both formal and informal, that host organisations use in their mentor training programmes;

> understanding how mentor training programmes deliver the knowledge and skills mentors need to fulfil their roles and responsibilities;

> what training and additional support facilities are made available to mentors throughout their involvement; and

> how effective mentors and host organisations feel the execution of these responsibilities actually is in meeting the needs of the client group.

875 The research plan was divided into three stages:

> a baseline quantitative study across all identified host organisations;

> a qualitative study of a sample of host organisations identified in the course of the baseline research; and

> a qualitative study of mentor attitudes and perceptions to the training and development they have experienced whilst involved with their host organisation.

876 The baseline quantitative study consisted of a paper questionnaire, which was sent to all mentor managers from the host organisations identified at this stage of the research. The qualitative study consisted of telephone interviews with mentor managers and mentors recruited from the baseline study. Based on the information from this initial survey, a training programme was developed, which involves a combination of:

> listening – primarily information on the host organisation;

> supported self-study – finding out about information sources both local, such as the IAG partnership, and national, such as **learndirect** and Worktrain; and

> an interactive element – including audio interactions between an individual and a volunteer.

877 The audio interactions are based on personal histories but are fairly generalised, aiming to present to the potential volunteer some of the challenges they may be faced with. The three areas dealt with are:

> not making assumptions;

> not being judgemental; and

> not being squeamish.

878 The audio interactions are not directly IAG-related and the onus will be on the trainer to use them to the best advantage. Suggestions are provided on how a trainer may best adapt the programme and the scenarios for alternative host organisations

Issues and learning

879 The key learning from this project was the problem of time constraints. The research organisation would have liked to have spoken personally to more volunteers, and difficulties were found with trying to use databases from other organisations that were found to be out of date. In addition, the host organisation has been unable to run the pilot training scheme as it needs to create a new post with responsibility for training.

Evaluation

880 The impact of the project so far has been a raising of awareness of the work of the host organisation through a local radio campaign to recruit volunteers and a research report on voluntary sector information, advice and signposting in Somerset. Future impact will be assessed through feedback and comments from organisations implementing the programme and the volunteers taking part.

Dissemination

881 The results of this project are being disseminated through:

> the project evaluation report;

> IAG national and local conferences;

> the Somerset IAG Partnership website;

> local newsletters; and

> IAG network meetings.

882 A copy of the project report can be found on the LSC Somerset website, accessible by following the links from 'Local View' on the national LSC site at www.lsc.gov.uk.

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Case Study 72: South Yorkshire: Continuous Professional Development

Purpose and benefits

883 The broad aim of this project was to increase capacity for the delivery of quality IAG for adults in South Yorkshire. The main focus was the continuous professional development (CPD) of existing IAG staff and building the capacity of workplace learner representatives and advice centre volunteers to deliver front-line IAG services.

884 The LSC South Yorkshire funded several strands of IAG-related activity, including:

> the delivery of information and advice through IAG partnerships, and of guidance through a co-financed project throughout South Yorkshire;

> co-financed training support for volunteer advice workers in independent advice centres and Citizens Advice Bureaux; and

> a co-financed workforce development project aimed at increasing the number of TULRs and non-union learner representatives in South Yorkshire.

885 The project would have two strands:

> CPD of existing staff in the IAG networks to provide a larger pool of staff qualified to NVQ at Level 3 and Level 4. This would involve establishing a South Yorkshire assessment centre for fast-tracking IAG staff; and

> training TULRs, non-union learning representatives and advice centre volunteers, which would involve networking with the local IAG practitioners and raising awareness of access and referral to IAG.

886 Based on the experiences of the Sheffield IAG Partnership, a key feature was offering incentive payments to voluntary and community organisations to enable them to release their staff for training and development. These would be staged payments made to cover staff time, and would be dependent upon completion of the qualifications.

Outcomes

887 The outcomes of the project were:

> IAG practitioners working towards NVQ at Level 3 or OCN-unit accreditation. The qualifications will be completed by the end of 2003;

> two outreach staff training in the NVQ; they will complete their qualifications in 2004;

> 20 TULRs or non-union learning representatives have gained OCN accreditation in IAG or are working towards NVQ advice units; and

> 25 advice centre volunteers have gained basic OCN accreditation in advice centre work.

Method of delivery

888 Delivery of training was through contracted provision. Training for TULRs or non-union learning representatives was delivered by networking sessions and joint training with practitioners from the South Yorkshire IAG networks. A course was also developed for learning representatives that ran over four days.

889 Following the four-day provision, participants had to complete a portfolio to achieve OCN accreditation with two credits.

Issues and learning

890 There is a shortage of qualified advice and guidance workers in the sub-region. Many had been recruited to the Connexions service, leaving a skills shortage that had already affected IAG delivery during the year. The skilled and experienced IAG staff that were available lacked the necessary accreditation to meet the standards for advice and guidance delivery.

891 It would also be beneficial to provide a more coherent service for adults in South Yorkshire by linking CABs and independent advice centres into the networks of IAG providers that were building their capacity by training volunteer advisers in programmes accredited by the OCN.

892 There was little demand or need for training towards the NVQ at Level 4, which highlighted the wisdom of undertaking a training-needs analysis before deciding on which training courses to offer.

893 There may be a need to build training into employer and trade union facilities agreements, as obtaining time off for learning representatives proved to be a barrier to training. A short- to mid-term solution would be the development of distance learning support packs for TULRs.

Evaluation

894 A wide range of new assessment measures has been introduced successfully, resulting in positive feedback from NVQ candidates. Delivery of guidance using trainees working towards the NVQ at Level 4 has been positively received by community groups in north-west Sheffield, and the Refugee Education and Employment Programme.

895 Future impact will be assessed through mainstreaming new assessment measures and techniques to make assessment more accessible. Completion targets for the NVQ will be carefully monitored and any lessons learned will be incorporated into future provision and delivery.

Dissemination

896 Local dissemination will be through the IAG networks and network newsletters as well as though the LSC South Yorkshire newsletter, which goes out to all partner organisations in the sub-region. National dissemination will be through the LSC bulletin and national IAG dissemination events hosted by the LSC national office.

897 A copy of the project report can be found on the LSC South Yorkshire website, accessible by following the links from 'Local View' on the national LSC site at www.lsc.gov.uk.

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Case Study 73: Suffolk: A New Basic Skills Module for the Open College Network Course

Purpose and benefits

898 The project proposed to develop a free-standing course module for the OCN basic skills course, that would be provided by supported computer distance learning. The unit would feature identifying and referring clients with basic skills needs.

899 The module is provided through a CD and written materials and so offers flexibility in how front-line staff, in a variety of settings, can access ways to improve their skills and knowledge with client referral. The module will complement the new basic skills training, when it comes into effect.

900 Because the project has been undertaken in a highly collaborative way using the expertise of several key agencies or sectors and specialised individuals across the county, it has provided a high profile for the local LSC and IAG partnership.

Outcomes

901 The outcomes of the project were:

> to provide a CD for an additional unit addressing how front-line workers in a wide range of organisations and settings can review and improve their skills and knowledge with IAG client referrals in basic skills; and

> to address how IAG front-line workers can identify adults whose needs may include basic skills, and how to use differing approaches to encourage clients towards more specialised assessment and skills development.

Method of delivery

902 The LSC Suffolk contracted with Suffolk IAG Partnership as the lead partner. The Suffolk IAG Partnership and Essex IAG Partnership worked together. Key partners and players were brought together in a steering group. This group capitalised upon expertise within the IAG partnerships and the county.

Issues and learning

903 With hindsight, it became apparent that this was a more ambitious project than first envisaged and every step took longer than anticipated – probably a third more than was planned for.

904 There was a steep IT learning curve and good IT support was essential.

905 A key success factor was the use of the skill and expertise of IAG partnership members and regional experts, whose strengths were sought and used.

Evaluation

906 Progress reports were studied at the IAG partnership meetings.

907 The unit was validated by OCN in February 2003. The CD was made available for demonstration at the same time.

908 This project's funding did not include an evaluation of the effectiveness of the CD. However, a local care trust is keen to use the CD in its induction for IAG staff with ex-offenders. This could form a part of the evaluation of the CD's impact and would be subject to a further funding application.

Dissemination

909 The CD and written material were given to the IAG partnership and the steering group in February 2003. The regional basic skills conference in June 2003 was also used as an opportunity to showcase the CD.

910 Subject to further evaluation of the contents, the course unit could be provided nationally, although the logistics of production would need to be clarified.

911 A copy of the project report can be found on the LSC Suffolk website, accessible by following the links from 'Local View' on the national LSC site at www.lsc.gov.uk.

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Case Study 74: Wiltshire and Swindon: Developing a Fast-track Training Model

Purpose and benefits

912 This project focused on the need to train front-line staff in identifying the needs of clients for IAG. It was designed to pilot a fast-track staff training programme. The staff chosen for the pilot were employed in army education centres and field units. The plan was to develop a model that could be applied and adapted nationally in the army and beyond.

Outcomes

913 The outcomes of the project were:

> development of an IAG fast-track training model;

> training for 10 front-line workers to achieve an NVQ in Advice and Guidance at Level 2;

> training for five basic skills tutors to achieve an NVQ in Advice and Guidance at Level 3; and

> army front-line IAG workers given the chance to experience guidance delivered in different environments.

Method of delivery

Level 1

914 Training and assessment plans were developed in consultation with providers and users. The BSA provided specialist advice on basic skills best practice. Independent trainers were contracted to deliver training, which was by block release. Assessment was conducted against evidence gathered in the workplace at times and locations agreed with individual employees and the army authorities.

Level 2

915 The plan was to run:

> four blocks of two-day residential training to cover the six elements required to gain the qualification; and

> two days to undertake written work and construct a portfolio.

916 Participants were assessed by independent assessors on a paper-free system.

Level 3

917 The plan was to run:

> 15 days' block release to cover the eight units required to gain the qualification;

> six days to conduct written work and construct a portfolio; and

> three days to undertake a staff placement.

918 After the first day of training, it was clear that the participants had many of the skills required and needed less input. The programme was amended to five days spread over the period, and candidates chose the areas of study they needed.

919 Two of the participants chose to be assessed through accreditation of prior learning. Three chose the non-paper assessment.

920 The pilot was managed by the project management board comprising representatives from Steps to Learning Wiltshire and LSC Swindon, and representatives acting on behalf of the army.

Issues and learning

921 It is important that participants are fully briefed before they attend the training, particularly with regard to the purpose of the training and how it will be applied in the workplace.

922 There were initial problems with the paper-free assessment system because of the volume of data required. These problems were overcome, but it helps to be aware of the:

> limitations of the IT system, particularly in relation to complex standards;

> additional assessor time required; and

> support equipment required.

923 It is important to know the participants and conduct a skills audit before deciding on the structure and content of the programme. Getting candidates' line managers fully involved in the training and assessment process is also important.

924 There were barriers to be overcome with participants who were not used to being observed and who were unused to evaluating their own work because they were not used to admitting weaknesses. However, all the participants acknowledged that the training had provided new skills or refreshed old ones and had a positive effect on their performance.

925 Candidates already familiar with NVQs were uncomfortable with the paper-free assessment system and wanted the security of a portfolio. By contrast, candidates who were unfamiliar with NVQs did not feel the need to have a portfolio.

926 Accreditation of prior learning can be problematic, and observation is often a quicker option. By the same token, flexibility in terms of training delivery is helpful to candidates but can produce logistical problems.

Evaluation

927 Four candidates working towards the NVQ at Level 3 have completed the qualification. One candidate was forced to drop out. Eight candidates achieved the NVQ at Level 2. These candidates are now considering the NVQ at Level 3.

928 Increased retention and completion rates are apparent in comparison with established network training and assessment methods.

929 Fast-track training was valued by the candidates and allowed them to improve their performance at work quickly. Candidates receiving regular visits from their assessors were more motivated and confident about their performance.

930 Future impact will be assessed through:

> a consideration of the **matrix** Standard to ensure CPD of front-line workers;

> continued involvement of front-line workers in network activities;

> considering what other staff may benefit from future IAG training; and

> whether candidates with the NVQ at Level 3 feel equipped to support candidates working towards the NVQ at Level 2 and Level 3 through training and assessment, including peer evaluation.

Dissemination

931 A report has been published and distributed and is on the Steps to Learning website. Presentations have been made at local, regional and national IAG events and conferences.

932 A copy of the project report can be found on the LSC Swindon and Wiltshire website, accessible by following the links from 'Local View' on the national LSC site at www.lsc.gov.uk.

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Abbreviations

ACL	adult and community learning
ACLS	Adult and Community Learning Service
BSA	Basic Skills Agency
BSL	British Sign Language
CAB	Citizens' Advice Bureau
CATI	computer-aided telephone interviewing system
CIP	Cognitive Information Processing
CPD	continuous professional development
CV	Curriculum Vitae
CVS	Council for Voluntary Service
DAST	Dyslexia Adult Screening Test
DfEE	Department for Education and Employment (replaced by the DfES)
DfES	Department for Education and Skills
DoH	Department of Health
DTI	Department of Trade and Industry
ESF	European Social Fund
FE	further education
GAB	Guidance Accreditation Board
GIEU	Graduates into Employment Unit
GIS	Geographical Information System
HE	Higher Education
HR	Human Resources
IAG	Information Advice and Guidance
ICG	Institute of Careers Guidance
IiP	Investors in People
IT	information technology
LEA	Local Education Authority
LIF	Local Initiative Fund
Local LSC	local Learning and Skills Council
LSC	Learning and Skills Council
MI	Management Information
NACRO	National Association for the Care and Resettlement of Offenders
NCVS	Nottinghamshire Council for Voluntary Services
NQSLW	National Quality Standard for Learning and Work
NHSU	NHS University
NIACE	National Institute for Adult Continuing Education
NICEC	National Institute of Careers Education and Counselling
NPS	National Probation Service
NVQ	National Vocational Qualification
OCN	Open College Network
PSETU	Probation Service Education and Training Unit
QDF	Quality Development Fund
RETAS	Refugee Education and Training Advice Service
RNIB	Royal National Institute for the Blind
SFTL	Small Firm Training Loans
SIAP	Supported Information Access Point
SMEs	Small- and Medium-sized Enterprises
SNIP	Special Needs Information Point
TAP	Training Access Point
TULR	Trade Union Learning Representative
WBL	Work-Based Learning
WDA	Workplace Development Adviser
WFD	Workforce Development