

# National Evaluation of Connexions Card: Final Report

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**Research Report  
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## SUMMARY OF FINDINGS

- 1) This is the Final Report for the National Evaluation of the Connexions Card Project, which York Consulting Limited (YCL), in collaboration with MORI, were commissioned to undertake on behalf of the Department for Education and Skills (DfES) over a three year period. The report pulls together findings from Phase Four of the research to provide an overview of progress towards meeting the aims and outcomes defined at the outset of the Connexions Card Project, at the end of three years of implementation nationally. It also places the findings in context by drawing on the key messages emerging from previous phases of activity. Most of the research used to inform this report was completed by the end of August 2004<sup>1</sup>, and management information was drawn down in the middle of September 2004.

### Overview

Introduced as an innovative and ground breaking project the Connexions Card started from a zero base and has over the past three years become established in small but significant strands of the learning market. The initial ambitions of the Card in terms of both functionality and scale of activity have not been realised for a variety of reasons. As a result, whilst the original aims and outcomes have not been changed, there has been a change in expectations of the Connexions Card Public Private Partnership (PPP) of what the Connexions Card can achieve.

The project has now reached a turning point. Recognising that some of the initial objectives are not attainable a decision needs to be taken on whether and how to maximise and build on the positive outcomes that have been achieved. The two key questions that now need to be considered are:

- whether the revised expectations represent success and value for money in policy terms?
- whether and how the project should be re-defined to ensure success and value for money in the future?

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<sup>1</sup> The Discount and Reward Providers survey was the only survey not completed by the end of August 2004. Key messages from this survey (which was completed in October 2004) have been incorporated into this final draft of the report.

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## Section 2: Context

- 2) The **second Annual Report for the national evaluation (October 2003)** concluded that:
- there had been a step change in approach to and delivery of the project in 2003;
  - young people were positive and enthusiastic about the concept of the Card;
  - usage had accelerated, though numbers were still small against original aims and outcomes;
  - areas for development included:
    - communication and marketing;
    - development of rewards and discounts;
    - ensuring a “right first time” delivery model;
    - focus on the harder to reach;
  - many of the issues that the Connexions Card Team had been seeking to address were identified during the evaluation of pilot projects undertaken prior to launch.
- 3) **Key changes over the past two years** to improve delivery and achievements include:
- a change in focus away from achieving purely volumes of Cardholders towards achieving greater usage by Cardholders;
  - an emphasis on improving motivation, rather than attendance of young people;
  - changes in the management and focus of the Connexions Card Team – towards increased communication, customer care and tighter procedures;
  - recognition that the card reader solution was not universally effective for all Learning Centres, nor necessarily the main vehicle for delivery;
  - a range of more flexible options for attendance recording;
  - employing experts in the field of rewards and discounts, increasing their credibility with the private sector providers and helping to improve the range and availability of rewards/discounts on offer;
  - definitions of critical success factors (CSFs) tightened and targets revised;
  - re-negotiation of the contract and targets with Capita designed to maintain the focus on keeping young people engaged.

### Section 3: Volume and Usage

- 5) This section reports on management information drawn down in the middle of September 2004.
- 6) **The number of Learning Centres engaged with the Connexions Card has increased considerably** over the last year, demonstrating the effectiveness of the changed approach and focus from the Connexions Card Team. It is not possible to comment on the overall scale or penetration of Learning Centres achieved, because we do not currently have information to identify whether those participating are part of the 3,000 pool of Learning Centres the PPP identified as a realistic marker (though further research being undertaken by DfES may enable us to provide this in the future).
- 7) Continued focus on customer care by the Regional Account and Attendance Recording Managers may help the Connexions Card Team to achieve the revised target for CSF 2 by the end of this year (1,000 Learning Centres).
- 8) **Use of the card reader solution has fallen across all provider types** and the majority of those that have stopped providing attendance information had used the card reader solution.
- 9) Some activities have been undertaken to progress Outcomes 5 (Education Maintenance Allowances (EMAs)), 6 (Discretionary points) and 10 (additional functionality), though it is early days for all these developments.
- 10) There is limited potential to improve electronic data collection system in post-16 institutions (Outcome 5). As part of the overall change in focus for the project, the Connexions Card Team decided not to take forward activities to introduce a facility for automatic enrolment (Outcome 8).
- 11) **The level of engagement of young people has improved considerably** since 2003. Revised targets for CSF 1 (550,000 by December 2004) appear to be achievable based on current performance, though starting from the adjusted figure for achievement, this may be more of a struggle. Reaching the original target of 750,000 by December does not look likely.
- 12) **Numerical targets for CSF 3 have been exceeded:** 54,788 young people had redeemed points at the end of August 2004, 110% of the CSF target for July 2004. However, the **relative performance target is clearly not realistic or achievable** in the medium term: 19% of eligible Cardholders with points had redeemed them at the end of August, compared to the target of 40% for July 2004<sup>2</sup>. Perhaps a more appropriate success criterion would be to consider the proportion of the 16-19 cohort that are engaged with the Card:
  - an estimated 9%<sup>3</sup> of the 16-19 cohort might currently be engaged either through claiming rewards or accessing discounts;
  - 3.7% of the 16-19 cohort have redeemed points;

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<sup>2</sup> Note: The Connexions Card Team have recently agreed a new measure for CSF3 which reflects wider usage of the Card beyond rewards redemption.

<sup>3</sup> This figure should be used with caution since it is based on a combination of database MI and sample survey proportions.

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- 0.8% of the 16-19 population have redeemed five or more rewards.
- 13) Redeemers have generally higher levels of engagement with other aspects of the Card (discounts and proof of age) than non-redeemers.
  - 14) The South East, East of England and East Midlands regions have the highest number of rewards being claimed and reward points being exchanged; the West Midlands, South West and North East the lowest.

#### Section 4: Effect and Impact

- 15) As seen last year, **Cardholders are generally positive about the potential benefits** of the Connexions Card.
- 16) **Redeemers are more positive about the Card than non-redeemers.** Redeemers are also more positive in 2004 than they were in 2003, whereas non-redeemers views have remained the same or are worse.
- 17) There is **no significant evidence of any direct impact** of the Card in terms of changes in attitudes to learning.
- 18) Whilst 2004 Cardholders find it financially easier to attend learning/training than baseline young people, this is most likely to be function of differences in the socially economic characteristics of the two survey samples.
- 19) Some of those participating in the Cardholders survey identified, through unprompted questions, **some effects of the Card (though sample sizes are not statistically reliable)**, including:
  - “encouraged me to get to school/college”;
  - “provided useful careers information”;
  - “helped me decide to go onto further or higher education”;
  - “change in motivation/attitude”.
- 20) As with most schemes of this nature, there is evidence of a considerable amount of deadweight associated with the Card, given that less than half of the Cardholder sample in 2004 agreed positively with statements about the effect of the Card. The Card is **more accessible and successful in engaging those who continue their education at school and are comparatively higher achievers**, and less so some harder to reach groups (see paragraph 31 below for reasons for this).
- 21) **Learning Centre views of the benefits** to their own institution from the Connexions Card have **declined since 2003**, though **views of the benefits to young people have remained the same.**

#### Section 5: Factors Affecting Achievements

- 22) **Between 2003 and 2004, there has been some improvement in the awareness and attitudes of Learning Centres** and the extent to which the Card is embedded within a number of Learning Centres. There is, however, considerable potential to further engage both existing and new Learning Centres in this way.

- 23) **FE Colleges tend to be more engaged with Card Distribution than ARS provision** and face more implementation difficulties with the latter (see Section 5 (5.5) of the main report for further details).
- 24) **There is a clear link between the Connexions Card being “embedded” within a Learning Centre and the consequent awareness, usage and benefits for Cardholders.** The Card is more likely to be “embedded” where there is significant promotion, contact and support from the Connexions Card Team; high levels of awareness and commitment amongst staff and students; and an explicit linkage of the Card with learning and attendance.
- 25) **Redeemers show consistently higher levels of awareness, use, ease of use and benefits,** compared to non-redeemers.
- 26) **Commitment and enthusiasm of Learning Centres can still be barriers** to embedding the Connexions Card in many institutions.
- 27) **Learning Centre attitudes to implementation are better than in 2003,** particularly in terms of satisfaction with ARS solutions. However, a quarter of those responding to the Learning Centres survey highlight continuing difficulties with promotion, card application/distribution and ARS operability.
- 28) A range of **barriers associated with engaging Learning Centres** were highlighted by the Connexions Card Team’s **Regional Account and Attendance Recording Managers.** Many of these are associated with communication with Learning Centres, administrative problems within Learning Centres and negative perceptions/attitudes towards the Connexions Card or to Capita.
- 29) **Communication and customer care from the Connexions Card Team has increased** over the last year. The Connexions Card Team was considered to be supportive by many Learning Centres, though some did highlight areas for improvement.
- 30) **Engaging some of the harder to reach groups in the Connexions Card has been constrained** by:
- the Connexions Card Team deciding not to proactively target and engage Connexions Partnerships (the main route to this client group), which have had a difficult year focused on more mainstream priorities;
  - roll-out was focused on reaching a “critical mass” necessary for success of the Card, which meant targeting those that were, initially, easier to reach.
- 31) The **range and availability of rewards and discounts is much improved.** Suggestions to address some practicalities have been made, including ensuring they are in stock and improving local accessibility.
- 32) **Some barriers associated with access to the Card** and its functions were highlighted in the Cardholders survey and case studies, including shops not recognising the Card; being refused as proof of age; problems with access to the website; availability of other cards; and decrease in awareness due to no longer being ARS operational and not, therefore, awarding points.
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- 33) **Discount and rewards providers appear to face very few implementation or operational issues** associated with the Connexions Card. However, the anticipated benefits associated with involvement in the Card have not materialised. The views of two national discount and reward providers we consulted are more positive and they are able to cite specific organisational benefits.

## **Section 6: Achievements, Conclusions & Recommendations**

### **Achievements in 2003/04**

- 34) The **step change in approach reported in the second annual report has continued** over the past year. Its effects have been particularly noticeable in the last 6 months when performance against targets for Learning Centre and young peoples' engagement has improved considerably.
- 35) There is evidence that the **model of delivery is achieving the "right first time" principle more often** which has helped to address a number of the barriers seen in previous years.
- 36) **Young people that are engaged remain positive** about the Connexions Card, with an increase being seen in the awareness, usage and benefits for redeemers in particular. A gap is emerging between redeemers and non-redeemers in terms of both awareness and attitudes to the Card. The research suggests that the link between embedding the Connexions Card within the Learning Centres and with learning is critical to success.

### **Intended Aims and Outcomes**

- 37) The figure overleaf provides a summary of achievements against intended aims and outcomes for the Connexions Card as identified at the outset of the project. This summary should be read within the context of comments made within the 'Overview' provided on page i).

<b>Summary of Achievements</b>
<p><b>Aim 1:</b> Encouraging more young people to remain in learning and motivating them to fulfil their full potential by rewarding their attendance and application through the provision of a range of discounts</p> <ul style="list-style-type: none"> <li>• <i>There is no clear evidence of a direct impact on attitudes to learning</i></li> <li>• <i>Between one-third and two-fifths of the Cardholders (with points), Learning Centres and parents surveyed are positive about the potential benefits of the Card</i></li> <li>• <i>Some of those participating in the Cardholders survey identified some effects of the Card</i> (though sample sizes are not statistically reliable), including “helped me decide to go onto further or higher education”; and “change in motivation/attitude”.</li> </ul>
<p><b>Aim 2:</b> Helping more young people to remain in learning by reducing some of the financial barriers to learning by giving access to a range of further discounts, on public transport, books and equipment.</p> <ul style="list-style-type: none"> <li>• <i>There is no clear evidence of a direct impact on financial barriers to enable young people to remain in learning</i></li> <li>• <i>15 national retailers are currently providing rewards and discounts associated with transport, books and equipment</i></li> <li>• <i>In August 2004, 31% of the rewards claimed were related to study/travel/equipment</i></li> <li>• <i>Between one-third and two-fifths of the Cardholders (with points), Learning Centres and parents surveyed are positive about the potential benefits of the Card</i></li> </ul>
<p><b>Aim 3:</b> Improving the career and life choices by providing better information through a website.</p> <ul style="list-style-type: none"> <li>• <i>There is no clear evidence of a direct impact on careers choices</i></li> <li>• <i>Between one-third and two-fifths of the Cardholders (with points), Learning Centres and parents surveyed are positive about the potential benefits of the Card</i></li> <li>• <i>Some of those participating in the Cardholders survey identified some effects of the Card</i> (though sample sizes are not statistically reliable), including helping with career choices/decisions</li> </ul>
<p><b>Outcome 1:</b> Improved levels of motivation, attendance and application in further learning.</p> <ul style="list-style-type: none"> <li>• <i>There is no clear evidence of a direct impact on attitudes to learning or attendance</i></li> <li>• <i>Between one-third and two-fifths of the Cardholders (with points), Learning Centres and parents surveyed are positive about the potential benefits of the Card</i></li> <li>• <i>Some of those participating in the Cardholders survey identified some effects of the Card</i> (though sample sizes are not statistically reliable), including punctuality and motivated/changed attitudes</li> </ul>
<p><b>Outcome 2:</b> A contribution to increased levels of participation and attainment in further learning.</p> <ul style="list-style-type: none"> <li>• <i>No clear evidence of impact on participation and attainment</i></li> </ul>
<p><b>Outcome 3:</b> Up to 1.7 million young people using the Connexions Card in steady state.</p> <ul style="list-style-type: none"> <li>• <i>1.7 million is an unrealistic target to have been set, given that in the CSF paper, the CCT identified 1.5 million as the “potential cohort who could carry a card”</i></li> <li>• <i>Achieving this outcome (i.e. to have significant numbers of young people “using the card in steady state”) remains a considerable challenge</i></li> <li>• <i>Current MI shows that 3.7% of the cohort are claiming rewards and indicative estimates show that 5.5% of the cohort may be accessing discounts</i></li> </ul>
<p><b>Outcome 4:</b> The Card will be available in all regions across England and in a wide range of institutions, including informal settings such as Youth Service and community projects as well as schools, colleges and training providers.</p> <ul style="list-style-type: none"> <li>• <i>The Card is available across all regions and a wide range of institutions. It is not possible to comment on the level of penetration within regions</i> (see Section 3 (3.8) for further detail).</li> <li>• <i>The potential to gain reward points is also available in all regions – on average at around 88 Learning Centres per region. Again we do not have sufficient information to comment on the proportion of the Learning Centres engaged within a region.</i></li> <li>• <i>There are few opportunities for Card access and use within informal settings</i></li> <li>• <i>The Card tends to be less accessible to the hard to reach and NEET groups</i> (see paragraph 31 above for reasons why)</li> </ul>

Summary of Achievements
<p><b>Outcome 5:</b> The Card will be used to provide the electronic recording of attendance in all learning centres that wish to take advantage of this function; to help enhance and modernise electronic data collection systems in post 16 institutions; assist in the validation process for the payment of the Education Maintenance Allowance; create minimum disruption to school business.</p> <ul style="list-style-type: none"> <li>• <i>The card reader solution is used by around one-third of ARS users; the potential to “enhance and modernise electronic data collection systems in Post-16 institutions” is limited</i></li> <li>• <i>27 Learning Centres are using the Connexions Card system to assist in the validation process for EMAs, providing access to EMAs for 0.04% of the 16-19 cohort.</i></li> <li>• <i>Whilst minimum disruption was not evident in the initial roll-out (evidence from previous phases of the evaluation pointed to the inadequacy of the system compared with others available) improvements in customer care have resulted in more positive attitudes amongst Learning Centres in 2004</i></li> </ul> <p><i>Note, however, that lessons learnt through the first years’ delivery of the Connexions Card (in particular that the card reader solution was not universally effective nor the main vehicle for delivery) means that the Connexions Card Team no longer expect this outcome to be achieved and they have deliberately not promoted the Card as a solution for EMAs.</i></p>
<p><b>Outcome 6:</b> The Card will be able to reward voluntary activity and the achievement of learning related goals, especially by those who are socially excluded/hard to reach.</p> <ul style="list-style-type: none"> <li>• <i>The Card is able to reward voluntary activity and the achievement of learning related goals</i></li> <li>• <i>The use of the Card for this purpose is relatively small. 0.1% of the cohort are receiving points for these activities, which are being awarded by 29 voluntary organisations, 5 Connexions Partnerships and 5 Learning Centres</i></li> <li>• <i>The Card is currently more accessible to and engaging more of the higher achievers</i></li> </ul>
<p><b>Outcome 7:</b> Young people will be able to access a wide range of discounts and rewards including transport, leisure and High Street discounts and opportunity rewards that are valued by young people. These discounts and rewards will be a mix of national and local.</p> <ul style="list-style-type: none"> <li>• <i>There has been an increase in access to discounts and rewards in 2004, reflecting an improvement in the range and accessibility</i></li> <li>• <i>15 national retailers are currently providing rewards and discounts associated with transport, books and equipment. In August 2004, 31% of the rewards claimed were related to study/travel/equipment</i></li> </ul>
<p><b>Outcome 8:</b> Facility for automatic enrolment of students onto courses in colleges and training providers.</p> <ul style="list-style-type: none"> <li>• <i>We are not aware that the automatic enrolment facility is available</i></li> </ul>
<p><b>Outcome 9:</b> Comprehensive website which will contain details of courses nationwide and careers information as well as health and lifestyle information and CV creation.</p> <ul style="list-style-type: none"> <li>• <i>A website is available and has been improved over the last 12 months</i></li> <li>• <i>2% of Cardholders are accessing the CV builder and careers pages</i></li> </ul>
<p><b>Outcome 10:</b> To build on the platform laid down through the Card’s basic functionality and develop wider initiatives such as an e-purse facility and other SMART card solutions</p> <ul style="list-style-type: none"> <li>• <i>A number of pilots have been undertaken to test additional functionality which have shown that the technology is effective for, for example, cashless catering, e-voting and transport functions. Some of these functions are continuing to be used in the pilot areas</i></li> <li>• <i>There are a number of lessons about implementation which will need to be taken on board for future roll-out to maximise the potential benefits for young people</i></li> <li>• <i>Further developments are under consideration</i></li> </ul>
<p><b>Outcome 11:</b> The Card will contain details that will allow it to be used as a proof of age card whereby young people will be able to show it to prove their entitlement to age restricted goods and services.</p> <ul style="list-style-type: none"> <li>• <i>Around 50% of redeemers and 40% of non-redeemers in the Cardholders survey were using the Card for proof of age. Whilst we do not have access to information on the availability and usage of comparator cards (such as the Citizenship card and NUS Associate card), we understand that the Connexions Card could currently be the most widely available proof of age card for 16-19 year olds in England and based on these figures, possibly the most widely used.</i></li> </ul>

## Conclusions

- 38) The Connexions Card project has a **considerable way to go to achieve the aims and outcomes** originally set:
- there is **no evidence that the original intended impact** is yet being achieved, though there is indicative evidence that the Card may be having some effect on some Cardholders;
  - in terms of numbers of young people using the Card, **considerable progress has been made over the last 12 months, though numbers remain small** compared to original expectations;
  - **access and usage tends to be from the more highly qualified and easier to reach** young people;
  - **benefits to Learning Centres are limited** given that the card reader solution did not provide the originally intended improvement in electronic data recording systems and a decision was taken not to press learning centres to use the automatic enrolment function.
- 39) **There has been a significant improvement in engagement** of Learning Centres and young people particularly over the past year. **Progress has also been made on a number of outcomes** related to rewards and discounts, website, trial of additional functionality and use for proof of age.

## Context Issues

- 40) Although we are not aware of the details of the **contract between the private and public sector partners we believe that it may have distorted the style and direction of Connexions Card roll-out**; in particular, the initial emphasis on volume rather than quality embedding. In hindsight it would have been better to devote the whole of the first year to developmental activity; more extensive piloting and testing.
- 41) The highly innovative and experimental nature of the Card perhaps required a **greater flexibility in approach and delivery** than can be easily captured in a performance related contract.
- 42) The initial identification and then revision of Critical Success Factors by the PPP Board was recognition that the original targets for the Card were not feasible. There is therefore a **need to formally review and revise the aims and outcomes for the Card**. This is especially the case given that the views of the Connexions Card Team of the purpose of the Card have themselves changed.
- 43) The question that remains, however, is what **would be the realistic expectations for the Card in this new context**? The negotiations on targets seem to have focused on what is achievable, which is appropriate, but there is also clearly a need to consider whether what is achievable meets policy and value for money objectives. **What is the critical mass in terms of volume, usage and functionality required for the initiative to be considered a success**? What would represent value for money in policy terms?
- 44) However, irrespective of this question, **there may be little incentive for the private sector partner to do anything other than deliver the contract**. The contract may
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still, therefore, remain a barrier to targeting the product in the most policy effective way, given that there appears to be no incentive for risk-taking.

### Recommendations - Issues for the future

45) In addition to the questions about success and value for money, there is a series of issues that we recommend should be considered in taking forward the Connexions Card project, including:

- Some of those consulted have suggested that the Connexions Card **has reached saturation point in terms of engaging Learning Centres in the provision of attendance information** – if this is the case, there are implications for overall potential achievements in terms of scale and benefits. If this level had been expected at the start, would the project have been launched?
- **Continued effort and significant resource** will be required to:
  - maintain the commitment of the more “successful” Learning Centres and engage others that still face some barriers;
  - focus on the awareness, usage and attitudes to engage more of the non-redeemers;
  - access the harder to reach and NEET target groups;
- The **Connexions Card Team have to an extent been playing catch-up over the last 18 months** due to a slow start to the Partnership and delivery – there are some key lessons associated with this type of partnership/initiative that have been highlighted through the delivery of Connexions Card that might be helpful to other/future government initiatives, including, for example:
  - clarity of purpose, outcomes and critical success factors from the outset;
  - piloting, testing and implementing a quality product in one region before rolling out nationally;
  - considering in full the implications of previous pilot evaluations;
  - the resource, negotiation skills and complications associated with initial contracting and on-going contract management.
- There are also **lessons regarding the operation of public private partnerships and level of risk-taking**, when delivering an initiative whose development, impact and profile are unclear. The Connexions Card project perhaps provides a useful case study for future operation of PPPs with initiatives of this nature;
- There may be **benefit associated with conducting some focused research in some of the more successful Learning Centres** to, for example, collate records of punctuality and attendance and conduct surveys of learner attitudes and motivations. This may provide more specific evidence of impact of the Connexions Card in a successful environment;
- There should be a **final wrap-up evaluation in 2006/7** linking this assessment to the final outcomes.





## 1 INTRODUCTION

1.1 This is the Final Report for the National Evaluation of the Connexions Card Project, which York Consulting Limited (YCL), in collaboration with MORI, were commissioned to undertake on behalf of the Department for Education and Skills (DfES) over a three year period. The report pulls together findings from Phase Four of the research to provide an overview of progress made at the end of three years of implementation of the Connexions Card nationally. It also places the findings in context by drawing on the key messages emerging from previous phases of activity.

1.2 There is a significant amount of evaluation material that has been generated to produce this report and here we outline the headline findings and issues arising in order to provide evaluative comment on progress and achievements. For each of the specific stages of evaluation activity, an individual evaluation report has been produced and copies can be obtained from the York Consulting Limited website ([www.yorkconsulting.co.uk](http://www.yorkconsulting.co.uk)):

- Cardholder, Baseline and Longitudinal Surveys, October 2004;
- Learning Centre Survey, October 2004;
- Parents Survey, October 2004;
- Survey of Discount and Reward Providers Report, November 2004;
- Case Study Thematic Report, October 2004;
- Individual Case Study Reports, August 2004, for:
  - Central London;
  - Derbyshire;
  - Lincolnshire and Rutland;
  - London North;
  - Greater Merseyside;
  - Northamptonshire;
  - Nottinghamshire;
  - Suffolk;
  - Tees Valley;
  - West of England.

## Aims and Outcomes of the Connexions Card

- 1.3 **Figure 1.1** lists the aims and intended outcomes for the Connexions Card. The aims were re-prioritised and outcomes slightly amended (to reflect a greater focus on the core aim of increasing motivation) in November 2002.

### Figure 1.1: Aims and Intended Outcomes of the Connexions Card

#### Aims:

1. Encouraging more young people to remain in learning and motivating them to fulfil their full potential by rewarding their attendance and application through the provision of a range of discounts within leisure facilities and on the High Street.
2. Helping more young people to remain in learning by reducing some of the financial barriers to learning by giving access to a range of further discounts, for example on public transport, books and equipment.
3. Improving the career and life choices that young people make by providing them with better information through a website.

#### Outcomes:

1. Improved levels of motivation, attendance and application in further learning.
2. A contribution to increased levels of participation and attainment in further learning.
3. Up to 1.7 million young people using the Connexions Card in steady state.
4. The Card will be available in all regions across England and in a wide range of institutions, including informal settings such as Youth Service and community projects as well as schools, colleges and training providers.
5. The Card will be used to provide the electronic recording of attendance in all learning centres that wish to take advantage of this function. This should help enhance and modernise electronic data collection systems in post 16 institutions. The resulting attendance recording data will be used to assist in the validation process for the payment of the Education Maintenance Allowance. The Connexions Card Attendance Recording System is designed to create minimum disruption to school business.
6. The Card will be able to reward voluntary activity and the achievement of learning related goals, especially by those who are socially excluded/hard to reach.
7. Young people will be able to access a wide range of discounts and rewards including transport, leisure and High Street discounts and opportunity rewards that are valued by young people. These discounts and rewards will be a mix of national and local.
8. A facility for the automatic enrolment of students onto courses in colleges and with training providers.
9. A comprehensive website which will contain details of courses nationwide and careers information as well as health and lifestyle information. Young people will be able to create a CV and update their personal details.
10. To build on the platform laid down through the Card's basic functionality and develop wider initiatives such as an e-purse facility and other SMART card solutions that can be applied within and beyond institutions.
11. The Card will contain details that will allow it to be used as a proof of age card whereby, should they choose to do so, young people will be able to show it to prove their entitlement to age restricted goods and services.

## Critical Success Factors

1.4 During November 2002 a series of Critical Success Factors (CSFs) for the project were identified by the Connexions Card Team (CCT), the public/private partnership (PPP) responsible for delivering the project, involving DfES and Capita. The agreed CSFs and targets set at the time are set out in **Figure 1.2**. Prior to this, the CCT were working to the much broader and general goal to have Connexions Card activity in place in all regions by the end of September 2002, with specific incentives that the PPP contract gives to Capita such as, in particular, the number of cards issued to young people.

<b>Figure 1.2: Critical Success Factors "To reach steady state by December 2005"</b>	
<b>Factor</b>	<b>Targets Set in November 2002</b>
1. Eligible Cardholders	December 2003 – 400,000 December 2004 – 705,000 December 2005 – 1,000,000
2. Learning Centres providing attendance data	December 2003 – 900 December 2004 – 1,350 December 2005 – 1,800
3. Eligible Cardholders with points exchanging points for rewards	July 2003 – 30% of eligible Cardholders with points July 2004 – 40% of eligible Cardholders with points July 2005 – 50% of eligible Cardholders with points July 2006 – 60% of eligible Cardholders with points
4. Monetary value to the young person	Value of £300 per annum for those participating
5. Impact on young people's motivation and attendance	Up to December 2005 - 11% of those participating have improved motivation and attendance December 2005 – 15%
6. Exploitation, including platform for other stakeholders and commercial development for self-funding	To be determined

1.5 In 2004 the definitions for CSFs 1 to 3 have been tightened to ensure that they provide a more accurate picture of progress being made by the Connexions Card project towards achievement of aims and intended outcomes.

1.6 In addition, the numerical targets for CSFs 1 to 3 have been revised downwards. This was done as a response to and recognition of both the market position and potential penetration of the Card. The revised definitions and targets are provided in **Figure 1.3**. Note, however that discussions around the definition and targets for CSF 3 are ongoing.

**Figure 1.3: Revised Definitions and Targets for CSFs 1-3**

**CSF 1: Eligible Cardholders** are those issued with the Connexions Card including those in their 19<sup>th</sup> Year (for the first six months of that year) plus ‘Starter Cardholders’ that have redeemed points.

December 2004 – 550,000  
 December 2005 – 800,000  
 December 2007 and 2008 – 1,000,000

**CSF 2: Learning Centre engagement** is measured as “Learning Centres that have sent attendance recording data in the last 3 months, including school vacations”.

December 2004 – 1,000  
 December 2005 – 1,200  
 December 2008 – 1,500

**CSF 3: This absolute measure** is the number of Eligible Cardholders redeeming points. The relative performance measure is the number of Eligible Cardholders redeeming points as a proportion of the number of Cardholders that have received points (Formal, Informal and Discretionary).

July 2004 – 50,000 numeric  
 July 2004 – 40% of eligible cardholders with points  
 July 2005 – 50% of eligible cardholders with points  
 July 2006 – 60% of eligible cardholders with points

## Issues for the Evaluation

1.7 The concept and model of delivery of the Connexions Card project has evolved and changed over its first 2 years of development. As a result it has been necessary for the evaluation itself to reflect this and adjust to address different issues. However, the core purpose of the project has not shifted and so the fundamental themes that the evaluation is seeking to address have remained the same, as follows:

- **Process – Set up and Delivery:** What factors have an influence on usage, effect, impact and value for money? How could development and delivery be improved?
- **Volume and Usage:** Are Young People and Learning Centres using the Card?
- **Effect:** What effect is the use of the Card having on young peoples’ motivation, attendance, financial barriers to learning, and careers information?
- **Impact:** Is there a follow-on impact on young people and learning centres/other stakeholders?

- **Value for Money:** What is the value for money, in absolute and relative terms?

## Evaluation Method

1.8 Previous Phases of the evaluation have been reported as follows:

- **Quarterly Report: March 2002;**
- **Annual Report: September 2002;**
- **Baseline Survey, Young People and Parents: July 2002;**
- **Discount and Reward Providers Surveys: March 2003;**
- **Voluntary Sector Trials: January 2003;**
- **Discretionary Points Trials: March 2003;**
- **Research with Young People not Redeeming Points: April 2003;**
- **Annual Report , October 2003;**
- **Phase 3 Reports:**
  - Cardholder survey, October 2003;
  - Learning Centre Survey, August 2003;
  - Parents Survey, August 2003;
  - Case Study Thematic report, August 2003;
  - Individual Case Study Reports, July 2003.
- **Discount Providers Survey: October 2003;**
- **Pilot evaluations of:**
  - Life in the Bus Lane;
  - Kettering Leisure Pass;
  - Sheffield Smart Connect;
  - Doncaster Cashless Catering.

1.9 Phase Four activities, the findings of which are the main focus of this report, have included:

- **Analysis of latest management information** available from the Connexions Card database;
- **Telephone survey of 1002 Cardholders**, selected using the Connexions Card database (including 525 thought to have redeemed some points, 477 thought to have points but not yet redeemed them);
- **Two longitudinal surveys** – one with 139 cardholders interviewed in 2003; and one with 412 young people interviewed in the 2002 Baseline Survey;
- **Telephone survey of 108 Parents** of Cardholders;
- **Telephone survey of 303 learning centres**, including 109 providing attendance data, 115 participating in Card Distribution only and 79 not yet participating in the Connexions Card initiative;

- **Qualitative consultations** with 88 learning centres, 226 young people and 14 stakeholders across 10 LSC based case study areas;
- **Consultations with the DfES and Capita** Connexions Card Team members.

### **Structure of the Report**

1.10 This report sets out the headline findings from Phase Four Activities as follows:

- **Section 2** provides a summary of the key issues emerging from previous reports and how delivery of the Card has changed and developed;
- **Section 3** outlines current volumes and usage of the Card by Learning Centres and young people;
- **Section 4** comments on the effect and potential impact of the Card on young people;
- **Section 5** details a range of delivery issues that directly contribute to the usage and effect of the Card;
- **Section 6** sets out our conclusions and recommendations based on the findings in preceding sections.

## 2 CONTEXT

### Key Points

- The national Connexions Card project is a seven-year initiative that began in September 2001, with an initial trial in the North East region followed by rollout to all regions by September 2002.
- The second Annual Report for the national evaluation (October 2003) concluded that:
  - there had been a step change in approach to and delivery of the project in 2003;
  - young people were positive and enthusiastic about the concept of the Card;
  - usage had accelerated, though numbers were still small;
  - areas for development included:
    - communication and marketing;
    - development of rewards and discounts;
    - ensuring a “right first time” delivery model;
    - focus on the harder to reach;
  - many of the issues that the Connexions Card Team had been seeking to address were identified during the evaluation of pilot projects undertaken prior to launch;
- Key changes over the past two years to improve delivery and achievements include:
  - an emphasis on improving motivation, rather than attendance of young people (though the latter may be achieved indirectly);
  - changes in the management and focus of the Connexions Card Team – towards increased communication, customer care and tighter procedures;
  - recognition that the card reader solution is not effective;
  - a range of more flexible options for attendance recording;
  - employing experts in the field of rewards and discounts, increasing their credibility with the private sector providers and helping to improve the range and availability of rewards/discounts on offer;
  - the definitions for critical success factors have been tightened and targets downgraded;
  - re-negotiation of the contract with Capita designed to maintain the focus on keeping young people engaged, with a greater focus on consolidation rather than expansion.

### Introduction

2.1 In this section we provide the context for this final report by:

- describing the starting point for the project, including the plan for rollout in the first year;



- summarising the key conclusions from the second annual report;
- outlining some key developments and changes that have taken place over the last 18 months.

## Starting Point

- 2.2 The national Connexions Card Project is a seven-year initiative which began in September 2001, with the core aims (unchanged, except in emphasis) of reducing some of the financial barriers to learning, motivating young people to fulfil their potential, and improving the career and life choices that young people make.
- 2.3 Whilst a series of pilot projects in different parts of the country had taken place prior to its implementation, the Connexions Card was in essence a new and innovative application in the policy arena of increasing the motivation of 16-19 year olds, an issue that had been on the agenda for some time. Innovation is in terms of the product itself (a card using smart technology being issued to all 16-19 year olds to provide a range of practical functions for young people and learning centres) and its delivery by a Public-Private Partnership (PPP) arrangement, the first of its kind for DfES at the time.
- 2.4 The pilot projects that had previously been undertaken provided a range of issues and messages for the PPP to draw upon in the design and delivery of the project<sup>4</sup>, as set out in **Figure 2.1** below.

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<sup>4</sup> Evaluating the Connexions Card Development and Pathfinder Projects, CRG, DfES Research Report RR318, December 2001

## Figure 2.1: Issues and Messages from Pilot Evaluation

### Key Issues

- Initial rollout – difficult to get cards fully functional – took a long time to get the ‘swiping’ equipment installed and functioning;
- IT systems – required major software development, cost and person-time to be effective;
- School and college staff – time required to train staff, resolve concerns, remind them of what they need to do – need good training/briefing/back up and hand holding;
- Initial interest by young people is positive – ‘something new’. However, if system problems exist with inadequate institutional encouragement young people easily become alienated;
- ‘Show and go’ discounts are reasonably easy and quick to develop. It is more difficult to get rewards from sponsors but they are necessary to be able to market the ‘incentive’ emphasis of the Card;
- FE colleges are difficult to engage – problems with use on multi centre sites, isolating 16-19 year group, and part time study. The monitoring system needs to be able to interact with in-house systems;
- Managing expectations – don’t market it as an ‘all singing, all dancing’ attendance system – it records, not monitors;
- Ensure the local emphasis but with national high profile rewards;
- There is evidence that it can prove to be attractive to disaffected young people.

### Messages to Rollout

- Build good operational partnerships, particularly with teachers and the FE sector:
  - easy to use systems, rapid problem solving, invest resource in rollout – consider phased rollout within FE;
- Ensure a fair and attractive reward structure:
  - need a strong core brand with tailored local offers, local rewards to be flexible, national to be high profile, straightforward reward redemption, need to engage sponsors for sustainable period, rewards and discounts to be in place when the Card is launched;
- Ensure and maintain effective IT implementation:
  - attractive website, attention to detail with hardware and software, detailed communication plan;
- Ensure involvement of young people:
  - get the right message out at the outset, allocate resource up front, emphasise all benefits of the Card, ensure database information is reliable, appoint champions;
- Manage expectations:
  - set out clear objectives.

## **Conclusions from Second Annual Report**

2.5 Key conclusions from the second annual report were:

### **Achievements in 2002/03**

- Over the 12 months to August 2003 there was clearly a step change in approach to and delivery of the Connexions Card project by the PPP, which was having a noticeable effect on the ground;
- Moving the focus away from purely Card Issue and towards more targeted activity with Learning Centres and young people resulted in considerable improvements in usage;
- Young people were positive and enthusiastic about the concept of the Card and there is evidence that simply possessing a Connexions Card is having a positive effect on young people;
- Whilst usage had accelerated, this had been a recent development and numbers were still small (in July 2003, 1% of the 16-19 cohort had used their Connexions Card to redeem points);

### **Areas for Development (identified in Second Annual Report, October 2003)**

- Those using the Card to the maximum were generally those that were more highly qualified, motivated and attended regularly;
- Performance against the Critical Success Factors (CSFs) in August 2003 was behind profile and for CSF 3 (Young People Redeeming Points) behind the July 2003 target. This would suggest that the initiative had not yet “reached the critical mass necessary to build momentum” as outlined in the CSF rationale paper;
- Whilst the projections for future use, based on the responses to the Learning Centre and Cardholder Surveys, suggest that future targets may be achievable, this is entirely dependent on the delivery of a “right first time” model;
- There remained a series of barriers associated with maximising young peoples’ use of the Connexions Card, which needed to be overcome if increased usage was to be achieved and challenging targets were to be met;

- The most significant areas for development included communication and marketing, development of rewards and discounts and ensuring a “right first time” delivery model for the awarding of attendance points;
- Outside the core concept for the Card, there was potential benefit from all or a significant number of young people having a SMART card that could be used for transport and other local authority (LA) services – the one card for all principle;

### **Learning Lessons from the Past (identified in second Annual Report, October 2003)**

- Whilst there had clearly been a positive turn around in delivery and performance, many of the issues that the Connexions Card Team have been seeking to address were identified during the evaluation of pilot projects undertaken prior to its launch. Specifically, ensuring a fully tested base model was in place before seeking to engage Learning Centres and young people nationwide; the significant resource required for customer service, training and support; and managing Learning Centre expectations in terms of the Connexions Card being based on a recording not monitoring system;
- Ensuring a quality “product” had been tested and implemented in the initial trial region (the North East) before rolling the Card out to other regions may have helped to limit the subsequent delivery and usage problems that became apparent;
- It is clear that one of the more strategic constraints being faced during the first 12 to 18 months was the newness of the partnership arrangement between DfES and Capita. A process of development and evolution was necessary but meant that the focus and effectiveness of delivery was not optimal. It is important that DfES, other government departments and Capita themselves draw on the lessons of this experience for future partnerships and initiatives of this nature.

### **Developments over the Past Year (2003/04)**

2.6 In response to the issues arising from the first two years of delivery, the PPP have implemented a range of changes and developments seeking to address the concerns identified. Taken as a whole, the developments represent a step change in the management of the project. The relationship between the two PPP partners has also clearly developed and matured. Key changes include:

- a change in focus away from achieving purely volumes of Cardholders towards achieving greater usage by Cardholders;

- an emphasis on improving motivation, rather than attendance of young people (though the latter may be achieved indirectly);
- a recognition that the card reader solution is not universally effective, given that it does not provide real-time and improved attendance monitoring information for most Learning Centres. In addition, the Connexions Card Team have deliberately not promoted the Card as a solution for EMAs. As a result the Connexions Card Team no longer expect **Outcome 5** to be achieved;
- linked to this, a change in ‘message’ to Learning Centres that an attendance recording system is being introduced not an attendance monitoring system;
- introduction of planned and phased in development of additional elements of the model over a period of time, including piloting prior to full rollout (this year has included the pilots for transport, leisure pass, cashless catering and e-voting);
- the focus by the Capita team – away from the technology, and Card Issue and towards points and rewards claiming and ensuring the Card is more attractive to young people. This has resulted from:
  - changes in the senior management team;
  - changes in the structure of the Connexions Card Team on the ground enabling much greater focus on communication and customer care, including:
    - the introduction of a new account management process, whereby Regional Account Managers (RAMs) from the Connexions Card Team are encouraged to adopt a “listen and engage” rather than “sell” approach;
    - introduction of attendance recording managers (ARMs) focused on the technical implementation of attendance recording solutions;
    - better explanation of the scheme and its benefits;
    - retraining and up-skilling for Connexions Card Team field staff;
    - processes to receive data from Learning Centres were simplified;

- employing experts in the field of rewards and discounts, increasing their credibility with the private sector providers and helping to improve the range and availability of rewards/discounts on offer;
- work (undertaken together with the DfES policy team) to develop the XML uploader and third party interfaces to provide more effective attendance recording solutions than the card reader;
- improving communications with Cardholders through more direct contact (reminder letters, texts etc.) and updating the website;
- identification of tighter definitions for CSFs and targets revised;
- re-negotiation of the contract with Capita designed to maintain the focus on keeping young people engaged, with a greater focus on consolidation rather than expansion.

### 3 VOLUME & USAGE

#### Key Points

- The **number of Learning Centres engaged with the Connexions Card has increased considerably** over the last year, demonstrating the effectiveness of the changed approach and focus from the Connexions Card Team. It is not possible to comment on the overall scale or penetration of Learning Centres achieved.
- Continued focus on customer care by the Regional Account and Attendance Recording Managers may help the Connexions Card Team to achieve the revised target for CSF 2 by the end of this year (1,000 Learning Centres).
- The **level of engagement of young people has improved considerably** since 2003. Revised targets for CSF 1 (550,000 by December 2004) appear to be achievable based on current performance, though starting from the adjusted figure for achievement; this may be more of a struggle.
- **Numerical targets for CSF 3 have been exceeded:** 54,788 young people had redeemed points at the end of August 2004, 110% of the CSF target for July 2004. However, the **relative performance target is clearly not realistic or achievable** in the medium term: 19% of eligible Cardholders had redeemed points at the end of August, compared to the target of 40% for July 2004.
- Perhaps a more appropriate success criterion would be to consider the proportion of the 16-19 cohort that are engaged with the Card. Our **estimates** suggest that:
  - **3.7% of the 16-19 cohort have redeemed points;**
  - **0.8% of the 16-19 population have redeemed five or more rewards;**
  - **around 9%<sup>5</sup> of the 16-19 cohort are currently engaged either through claiming rewards and/or accessing discounts.**
- The Cardholders survey suggests that **redeemers have generally higher levels of awareness and engagement with other aspects of the Card than non-redeemers** – respectively, 59% and 49% of redeemers had accessed discounts and used the Card for proof of age; compared to 35% and 39% of non-redeemers.
- Eligible Cardholders are more prevalent and redemption rates are higher amongst Cardholders attending schools with 6<sup>th</sup> forms and lower for those at work based training providers and schools providing for those with special education needs. This **suggests that the Card is more successful at engaging those who continue their education at school and less so some harder to reach groups.**

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<sup>5</sup> This figure should be used with caution since it is based on a combination of database MI and sample survey proportions.

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## Introduction

- 3.1 In this section we comment on the achievements of the Connexions Card Project in relation to volume and usage of the Card by Learning Centres and young people themselves. We use a mix of management information (drawn down by Capita from their Connexions Card database in the middle of September 2004) and evidence from the qualitative and quantitative research undertaken with Cardholders and Learning Centres/other stakeholders (completed by the end of August 2004).
- 3.2 We comment on the Critical Success Factors (CSFs) and some of the intended outcomes of the initiative (both set out in Section 1) throughout this section which is structured as follows:
- **Learning Centres:**
    - Card Distributors;
    - Attendance Recording Solution (ARS)<sup>6</sup> Users – **CSF 2**;
    - Other Uses and Outcomes;
  - **Young People:**
    - Eligible Cardholders – **CSF 1**;
    - Eligible Cardholders redeeming points – **CSF 3**;
    - Other Uses & Outcomes.

## Management Information Adjustments

- 3.3 In last year's annual report it was necessary to make downward adjustments to the management information drawn down from the Connexions Card database because evidence from the Cardholder and Learning Centre surveys suggested that the information was not always accurate. We understand that differences between management information and actual performance were a function of both definitional issues and the way in which information is recorded on the database. Subsequent investigations and changes have resulted in tighter definitions (in particular for CSF 2 - Learning Centre engagement)<sup>7</sup> and we can therefore have more confidence in the management information being used. However, there do appear to remain difficulties associated with how some of the information is recorded and therefore inaccuracies when applying queries to the database can still occur.

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<sup>6</sup> ARS Users includes all types of ARS solution – card readers, 3<sup>rd</sup> party interfaces, XML upload etc

<sup>7</sup> The definition for CSF2 has been changed from all Learning Centres supplying data at any point to Learning Centres providing data within the last 3 months.

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3.4 Again, evidence from this year's surveys and case studies show a discrepancy between the MI used to identify Learning Centres and Cardholders and the actual status of these Learning Centres and Cardholders as classified by themselves. It is important to note that in both cases discrepancies may be a result of a number of factors, including:

Learning Centres

- the individual being spoken to being unaware of the actual situation for their Learning Centre;
- in the case of Card Distributing Learning Centres, the query used for the database selects Learning Centres which have at least one eligible Cardholder, and so includes Learning Centres that may not have actually distributed Cards since Cardholders can apply direct via an application form or careers event without the Learning Centre being involved;

Cardholders

- Cardholders having forgotten;
- Cards being lost/thrown away.

3.5 Due to some of these factors, we feel it is necessary to use the survey and case study information to make adjustments to the MI, using the following proportions:

- 15% of Learning Centres classified as Card Distributors on the database are not;
- 20% of non-redeeming Cardholders (with points) no longer have their Card.

3.6 The tables and commentary that follows therefore include the MI drawn down and the adjusted figures.

## Learning Centres

### Card Distributors

- 3.7 On 16<sup>th</sup> September 2004, the Connexions Card database indicated that 3,769 Learning Centres had at least one eligible Cardholder. Adjusting this figure downwards by 15% to account for discrepancies (such as Learning Centres being recorded when they have at least one eligible Cardholder that applied direct, for example), results in a **Card Distributing figure of 3,204**. This is a **significant increase in the number of Card Distributing Learning Centres** since August 2003 (1,960).
- 3.8 **Scale of Activity:** The Connexions Card Team identified a pool of 3,000 Learning Centres<sup>8</sup> as a reasonable target of Learning Centres to engage in the Connexions Card. We do not, however, know which Learning Centres fall into this pool of 3,000 and are therefore unable to comment on achievements in relation to scale or penetration.
- 3.9 **Regions:** Card Distributing Learning Centres appear to be fairly evenly spread across the regions – the highest number are in the South East and London (18% and 15% of the total respectively) and the lowest in North East and West Midlands (both 8%). This difference is likely to reflect the relative size of the regions as opposed to higher levels of penetration. We do not have the information to be able to comment on the level of penetration of Learning Centres within regions<sup>9</sup>. [**Outcome 4**]
- 3.10 **Learning Centre Types:** More than 50% of the Learning Centres with at least one eligible Cardholder are schools with sixth forms, 15% are Further Education Colleges and 12% are Work Based Training Providers. Again, it is not possible to comment on penetration rates.

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<sup>8</sup> Whilst the Connexions Card database suggests that there are more than 8,000 Learning Centres in England, this is likely to include some duplicates, and the PPP identified a pool of 3,000 as a realistic marker for the CSFs.

<sup>9</sup> Whilst the database includes total number of LCs in each region, there is no break-down for the 3,000 pool of Learning Centres (including all the larger Learning Centres) that the PPP identified as a realistic marker.

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### Attendance Recording Solution (ARS)<sup>10</sup> Users – CSF 2

3.11 Critical Success Factor 2 is a measure of Learning Centre engagement in the Connexions Card and is:

***“Learning Centres that have sent attendance recording data in the last 3 months, including school vacations”***

3.12 **Table 3.1** provides a summary of performance against original and revised targets as set by the Connexions Card Team.

Three months to end of:	Number	% of 3,000 Pool of LCs	% of LCs on database	Profiles/Targets	
				Revised	Original
Dec-04	-			1,000	1,350
Sep-04	-			958	-
<b>Aug-04</b>	<b>799</b>	<b>27%</b>	<b>10%</b>	-	-
Jul-04	941	31%	11%	-	-
Mar-04	940	31%	11%	904	-
Dec-03	874	29%	10%	-	900
<b>Aug-03</b>	<b>508</b>	<b>17%</b>	<b>6%</b>	-	<b>550</b>
Mar-03	372	12%	4%	-	-

3.13 At the end of August 2004, 799 Learning Centres had provided attendance data. Again, it is not possible for us to comment on overall scale of achievement in relation to the potential pool of 3,000 Learning Centres. Performance is lower in August than the trend seen between March and July 2004 (which has remained around the 930 to 940 mark) due to a drop in returns over the summer holidays. July 2004 performance is therefore perhaps a more realistic marker – **at 941 this is not far from the revised profile set for September 2004 (958) and represents a significant improvement on the same time last year.**

3.14 **Future Potential:** Between August and December 2003 a considerable improvement was seen for CSF 2, with an additional 366 LCs providing ARS in the 3 months to the end of December. If a similar improvement was seen at the end of this year the Connexions Card Team would achieve the revised target for the end of this year and would not be far behind the original target.

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<sup>10</sup> ARS Users includes all types of ARS solution – card readers, 3<sup>rd</sup> party interfaces, XML upload etc

- 3.15 However, the relatively static achievement of 930 to 940 Learning Centres over the last 6 months may suggest that such a dramatic increase over the next few months may not now be possible. Mixed views were expressed by the Regional Account Managers consulted during the case study fieldwork. Whilst some talked of *“increased planning for the year to prepare in advance for the September intake and use January to April for customer service”*, others felt that they *“had now reached saturation point with engaging schools in the area and the focus was now on “customer care”*.
- 3.16 Positive responses from the Learning Centre survey, however, about future involvement in ARS provision do suggest the potential to engage more Learning Centres. 10% of Learning Centres responding to the question about future involvement (80) said they expected to start providing attendance information in the next 3 months (though a higher proportion did not expect to be involved than in 2003 – 49% this year, compared to 39% in 2003). In addition, the Connexions Card database shows that 39 Learning Centres had provided data for the first time ever in the last 3 months.
- 3.17 **ARS Solution:** Around a third of Learning Centres providing data in the last three months are using the card readers to record and collate attendance data. A fairly even mix of third party interfaces, website and XML Upload are increasingly being used instead.
- 3.18 The Learning Centre survey suggests that the use of the card reader solution has fallen across all provider types, with it being most popular with schools and 6<sup>th</sup> form colleges. The majority of those that have stopped providing attendance information had used the card reader solution. The survey also shows a significant increase in the proportion of Learning Centres running the Connexions Card alongside their existing attendance register system (55% of ARS users, compared to 20% in 2003).
- 3.19 Intended **Outcome 5** (see Section 1), to enhance and modernise electronic data collection systems for post-16 institutions, is therefore potentially being achieved for relatively small numbers of Learning Centres – based on the MI around 300 Learning Centres in total.
- 3.20 **Regions:** ARS provision is being achieved in all regions, with the smallest number in the North East (7% of all ARS providers) and the highest in the South East (18%). [**Outcome 4**]
-

3.21 **Learning Centre Type:** The most common ARS provider is schools with 6<sup>th</sup> forms (62% of all ARS providers), followed by Further Education Colleges (15%) and Work Based Training Providers (12%).

#### **Other Uses and Outcomes**

3.22 At 20<sup>th</sup> September 2004, 27 Learning Centres had used the Connexions Card system to collect and transfer information about attendance to LEAs for the receipt of EMA payments. **[Outcome 5]**

3.23 In August 2004, 29 voluntary organisations, 5 Connexions Partnerships and 5 Learning Centres had allocated discretionary points. The Learning Centre survey shows that interest in issuing discretionary points has declined slightly since last year, but still remains high with 83% of ARS users showing some interest. **[Outcomes 4 & 6]**

3.24 As far as we are aware, no Learning Centres have used an automatic enrolment facility of the Connexions Card. **[Outcome 8]**

3.25 A number of “additional functions” for the Connexions Card have, however, been piloted through funding for piloting of smartcards from ODPM. **[Outcome 10]** These have included:

- piloting of a transport function in North Devon;
- leisure facilities in Kettering;
- cashless catering in Doncaster;
- e-voting in Sheffield.

3.26 YCL reported on the pilots earlier this year. Key issues identified included:

- embedding the Card within Learning Centres is key to success;
- multi-functionality has had a positive effect on Card distribution and ease of use, but has had a limited effect on Cardholder awareness and use of Connexions Card functions;
- effective project management and communication between the Connexions Card Team and Learning Centre/additional function leads is critical to successful implementation.

## Young People

### Eligible Cardholders – CSF 1

3.27 Critical Success Factor 1 measures the number of eligible Cardholders as follows:

*“Eligible Cardholders are those issued with the Connexions Card including those in their 19<sup>th</sup> Year (for the first six months of that year) plus ‘Starter Cardholders’ that have redeemed points”*

3.28 **Table 3.2** provides a summary of performance against original and revised targets as set by the Connexions Card Team.

Month	Number	% of 16-19 cohort	% of Dec-05 target		Profiles/Targets	
			Revised	Original	Revised	Original
Dec-05					800,000	1,000,000
Dec-04					550,000	750,000
<b>Aug-04</b>	<b>448143</b> <b>(358,514)<sup>11</sup></b>	<b>30%</b> <b>(24%)</b>	<b>56%</b> <b>(45%)</b>	<b>45%</b> <b>(36%)</b>	440,832	-
May-04	390,630	<b>26%</b>	<b>49%</b>	<b>39%</b>	392,528	527,918
Mar-04	386,459	<b>26%</b>	<b>48%</b>	<b>39%</b>	-	476,250
Dec-03	382,417	<b>25%</b>	<b>48%</b>	<b>38%</b>	-	400,000
<b>Jul-03</b>	<b>221,557</b>	<b>15%</b>	<b>28%</b>	<b>22%</b>	-	266,000
Mar-03	188,763	<b>13%</b>	<b>24%</b>	<b>19%</b>	-	203,000

3.29 At the end of August 2004, the database shows that 448,143 Cards had been distributed to eligible Cardholders – 30% of the 16-19 cohort, 56% of the revised December 2005 target and 45% of the original December 2005 target. This performance exceeds the revised profile for achievement in August but is behind the original profile. The Cardholders Survey indicated that 20% of Cardholders with points no longer had their cards. Using this as a proxy, the adjusted eligible Cardholder figure is 358, 514 – 24% of the 16-19 cohort.

<sup>11</sup> Adjusted figure based on 20% of non-redeeming Cardholders in the Cardholder Survey no longer having a Card

- 3.30 Performance for this indicator has improved considerably since July 2003, having more than doubled. Significant increases were seen in particular in the Autumn of last year with an average of 32K per month increase between July and December 2003, compared to an average monthly increase of 8K between January and August 2004. This reflects expectation given the beginning of academic year focus from the Connexion Card Team.
- 3.31 **Future Potential:** Based on the database figures the revised target for the end of this year (550,000) appears to be achievable especially if similar increases are seen in the Autumn period this year as those seen last year – a per month increase of around 25K will be required. Using the current ratio of Card Distributing Learning Centres to eligible Cardholders (1:150), achievement of the December 2004 target would require an additional 679 Learning Centres involved in Card Distribution. On adjusted performance in August 2004, the December 2004 target is less realisable and the original target of 750,000 is clearly beyond reach.
- 3.32 **Regions:** Eligible Cardholders are fairly evenly spread across the nine English regions, with the highest proportion in the South East (17%) and the lowest in the West Midlands (6%). [**Outcome 4**]
- 3.33 **Learning Centre Type:** Almost a half of eligible Cardholders are based at Schools with 6<sup>th</sup> Forms, one-third at FE colleges and only 2% at work based training providers. This suggests that Card is more available those who continue their education at school and less so to some harder to reach groups. [**Outcome 6**]

#### **Eligible Cardholders Redeeming Points – CSF 3<sup>12</sup>**

- 3.34 Critical Success Factor 3 is a measure of the engagement of eligible Cardholders and is defined as follows:

***“The absolute measure is the number of Eligible Cardholders redeeming points.*”**

***The relative performance measure is the number of Eligible Cardholders redeeming points as a proportion of the number of Cardholders that have received points (Formal, Informal and Discretionary).”***

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<sup>12</sup> Note: The Connexions Card Team have recently agreed a new measure for CSF3 which reflects wider usage of the Card beyond rewards redemption.

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3.35 **Table 3.3** provides a summary of performance against original and revised targets as set by the Connexions Card Team.

<b>Table 3.3 CSF 3 – Eligible Cardholders Redeeming Points</b>						
<b>Month</b>	<b>Number</b>	<b>Targets</b>		<b>CHs with points</b>	<b>Relative performance</b>	<b>Targets (original)</b>
		<b>Revised</b>	<b>Original</b>			
Jul-06						60%
Jul-05						50%
<b>Aug-04</b>	<b>54,788</b>	-	-	<b>288,839</b>	<b>19%</b>	
Jul-04	53,634	50,000	28,000	288,477	19%	40%
Mar-04	43,223	-	-	256,112	17%	
Dec-03	37,166	-	-	237,135	16%	
<b>Jul-03</b>	<b>15,182</b>	-	<b>17,000</b>	<b>94,888</b>	<b>16%</b>	<b>30%</b>
Mar-03	7,595	-	-	75,950	10%	

3.36 In August 2004, there were 54,788 redeemers - 19% of the eligible Cardholders with points and 3.7% of the 16-19 population. This exceeds the numeric target set by the Connexions Card Team for July 2004 but is some way behind the relative target of 40% of eligible Cardholders with points redeeming them.

3.37 There has been a considerable improvement in performance on this target since July 2003 last year – there are around 3.5 times as many redeemers this year. Proportionally, however, the percentage of redeemers has only increased by three percentage points. Whilst performance remained fairly static for the last 6 months of 2003, there has been a steady increase of 1 percentage point every two to three months in 2004.

3.38 **Future Potential and Success Criterion:** This trend suggests that relative targets are not achievable in the medium term and are therefore unrealistic. Whilst we understand that these relative targets were set to provide an indicator of minimum success, a more appropriate target or success factor might be to consider the overall proportion of 16-19 year olds that are engaged with the Connexions Card — is 3.7% of the 16-19 population redeeming points success and if not, what would be? There are, in addition, other measures of engagement which we discuss further below.



- 3.39 Around two-fifths of non-redeemers responding to the Cardholder Survey said they thought they might claim rewards in the future. Applying this proportion to current numbers of non-redeemers would suggest the potential for an additional 95,961 redeemers. **Note, however, that this is indicative only given that it involves combining sample survey proportions with database MI.** If this were achieved, the proportion of 16-19 year olds engaged in redemption would be around 10%.
- 3.40 **ARS Solution:** The proportion of Cardholders with points that are redeeming them at Learning Centres using the card reader solution is 22%, slightly more than the proportions based at Learning Centres using other solutions (15% at Learning Centres using third party, 16% using web, 18% using XML uploader). This suggests some association between physical use of the Card through the card reader solution and Cardholder redemption behaviour, but it is not significant.
- 3.41 **Region:** Redemption levels by region are relatively similar – the highest proportion of Cardholders with points that are redeeming them are in the East of England, West Midlands and the East Midlands (each having just over one-fifth of Cardholders with points redeeming them) and the lowest in the South West, North East and North West (with around one-sixth). [**Outcome 4**]
- 3.42 In terms of number of rewards being claimed and number of points being exchanged, activity is greatest in the South East, East of England and East Midlands (all 15% or more of the total number/points being claimed). Activity is lowest in the West Midlands, South West and North East (all around 7% or 8% of the total number/points being claimed).
- 3.43 **Learning Centre Type:** Redemption rates are highest within schools with 6<sup>th</sup> forms (21% of Cardholders with points have redeemed them), followed by 6<sup>th</sup> form colleges (18%) and FE Colleges (15%). By comparison, redemption rates within work based training providers and Learning Centres providing for those with special educational needs (11% and 10% respectively) are relatively low.

3.44 In addition, evidence from the case studies suggests that in the Learning Centres that are “*more successful*”<sup>13</sup>, GCSE and GCE/VCE performance tends to be higher than where the Card is not so successful. This suggests that the Connexions Card Team are being less successful at engaging those within the lower achieving or harder to reach groups. [Outcome 6]

### Other Outcomes and Uses

#### Reward Claims Patterns

3.45 Further analysis of the rewards claims data shows that a relatively small proportion of redeemers are claiming rewards more than once – 20% of redeemers claim 5 or more rewards and 8% claim 10 or more rewards. Overall, 0.8% of the 16-19 population are regularly engaged by claiming 5 or more rewards.

3.46 Data on the number of points held by eligible Cardholders also suggests that those that have not yet redeemed points are not consciously saving points – non-redeemers have on average 1,555 points on their Card compared to redeemers who have on average 1,877 points. This finding is supported by the Cardholders Survey which identified that only 2% of those not yet claiming rewards were consciously saving points for larger rewards (a similar proportion was found in the more qualitative focus groups with young people).

3.47 Analysis of redeemers’ behaviour shows that those that do redeem points tend to do so within the first 6 months of having a Card – 66% of redeemers had redeemed within 6 months and only 19% had first redeemed after having the Card for more than 9 months. This demonstrates that the greatest chance to engage Cardholders is when they are initially issued with a card, though there is some potential to maximise on latent demand.

#### Discretionary Points

3.48 On 20<sup>th</sup> September 2004, 1,655 young people had received discretionary points – 0.1% of the 16-19 population and 0.6% of all those receiving points. [Outcome 6]

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<sup>13</sup> In that, the Card is embedded with majority of eligible young people having a Card, regular provision of ARS, awareness amongst staff and young people are actively and regularly using the Card and Website through redemptions and discounts.

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EMAs

- 3.49 On 20<sup>th</sup> September 2004, 560 young people had accessed EMA payments via the Connexions Card – 0.04% of the 16-19 population and 0.2% of all those receiving points. [Outcome 4]

Discounts

- 3.50 The Cardholders Survey suggests that redeemers' use of the Connexions Card to claim discounts has increased significantly between 2003 and 2004, but has remained static for non-redeemers (those with points not redeemed) – 59% of redeemers said that they had used the Card for discounts, compared to 35% of non-redeemers. Evidence from the case studies supports this level of usage with 44% of young people participating in focus groups saying they had used the Card for discounts (again significantly more than last year). [Outcome 7]

Website Use

- 3.51 Website statistics from the Connexions Card team suggest show that 10,039 users have logged on to the CV builder since the website was live – 1% of the 16-19 cohort. [Outcome 9]

Proof of Age

- 3.52 The Cardholders Survey suggests that the proportion of Cardholders using their Card as proof of age has remained similar to levels since in 2003 – 49% of redeemers and 39% of non-redeemers. Fewer young people involved in the qualitative case studies said they had used the Card for proof of age (26%). [Outcome 11]

Overall Cardholder Engagement Levels

- 3.53 Using the management information from the Connexions Card database and evidence from the Cardholders Survey we provide below, in **Table 3.4**, an estimate of the number of Cardholders that may be engaged with the Card through reward redemption or access to discounts. ***Please note that this is indicative only - it is based on combining sample survey proportions with actual data and so must be treated with caution.*** It does hopefully provide, however, an indication of the potential level of engagement of 16-19 year olds with the Connexions Card.

<b>Table 3.4: Estimate<sup>14</sup> of Cardholders Engaged with the Card</b>			
	<b>Number/Estimate</b>	<b>% of 16-19 cohort</b>	<b>Source</b>
<b>Redeemers</b>	54,788	3.7%	CCT database
<b>Non-redeemers accessing discounts</b>	81,918	5.5%	% non-redeemers accessing discounts (Cardholders survey) <b>multiplied by</b> no. of Cardholders with points not redeemed (CCT database)
<b>Total estimate</b>	<b>136,706</b>	<b>9.1%</b>	

3.54 Respondents to the Cardholder survey were generally positive about future use of the Card for redemptions and discounts. 41% of non-redeemers thought they would claim rewards in the future and 44% of non-redeemers who had not accessed discounts thought they might in the future. Assuming that the majority of these people would be the same, if these proportions were achieved the number of reward claimers or discount users would increase to around 200K, 13.6% of the 16-19 cohort<sup>15</sup>.

<sup>14</sup> Caution should be taken in interpreting these indicative estimates

<sup>15</sup> Caution should be taken in interpreting these indicative estimates

## 4 EFFECT & IMPACT

### Key Points

- As seen last year, **Cardholders and parents are generally positive about the potential benefits of the Connexions Card.** Learning Centres are generally less positive than Cardholders, though a relatively high proportion does agree that the Card may have some effect in the future.
- A significant finding this year is that **redeemers are more positive about the Card than non-redeemers.** Redeemers are also more positive in 2004 than they were in 2003, whereas non-redeemers' views have remained the same or worse.
- Where the Card is **“embedded” within a Learning Centre, young people are more positive about the Card.**
- There is **no significant evidence of any direct impact** of the Card in terms of changes in attitudes to learning.
- Whilst 2004 Cardholders find it financially easier to attend learning/training than Baseline young people, it is difficult to attribute this difference to the Connexions Card.
- A small number of those participating in the Cardholders survey identified, through unprompted questions, some effects of the Card (though sample sizes are not statistically reliable), including:
  - “encouraged me to get to school/college”;
  - “provided useful careers information”;
  - “helped me decide to go onto further or higher education”;
  - “I am motivated/have changed my attitude”.
- For 13% of redeemers and 7% of non-redeemers, the Connexions Card was amongst the top three influences on their attitudes to learning.
- There is evidence of a **considerable amount of deadweight associated with the Card**, given that in most instances, less than half of the Cardholder sample in 2004 agreed positively with statements about the effect of the Card.
- The Card is more **accessible to, and successful in engaging, those who continue their education at school and are comparatively higher achievers**, and less so some harder to reach groups.
- **Learning Centre views of the benefits to their own institution from the Connexions Card have declined since 2003.**

### Introduction

4.1 In this section we draw on a range of evidence sources to consider the questions of effect and impact of the Connexions Card, in terms of:

- **Benefits to and Attitudes of Cardholders;**
- **Impact on Cardholders;**
- **Impact on Learning Centres.**

## Benefits to and Attitudes of Cardholders

- 4.2 The range of evidence collected through this evaluation suggests that a significant proportion of Cardholders have positive attitudes about the Connexions Card and the benefits it provides.

### Interpretation Issues

- 4.3 Before looking at this evidence in more detail it is important to highlight some issues regarding the interpretation of the findings from the Cardholders survey and the case study focus groups with young people. In particular, we feel that the specific questions asked of Cardholders about the effect or impact the Card has had must be treated with caution and at most can be interpreted as an indication of the positive attitudes of Cardholders, rather than evidence of actual impact (which we discuss further below). This is because:

- there are inconsistencies between the responses from the Cardholders survey and the case study focus groups, with the positive responses in the Cardholders survey not being supported in scale by the focus groups;
- some of the responses to the Cardholder survey do not always make logical sense, most particularly in relation to the questions about impacting on careers decisions and choices – a significant proportion of Cardholders feel the Card has helped here, yet only a very small number say they have actually used the CV builder and careers pages.

- 4.4 Potential reasons for these outcomes include:

- the **focus groups may result in less positive attitudes** due to the following factors:
  - they do not involve a representative sample and participants are self-selecting;
  - those with more positive attitudes may be reluctant to speak up if others in the group are negative;
- at the same time, **focus groups** involve a different method of questioning, with an **opportunity to seek clarification and understanding**, for example, in one focus group we undertook in the initial round-up of views participants indicated an effect on punctuality, but during later discussion said they *“just wanted to be positive and that it could influence some people but actually we don’t decide to come to school because otherwise we might miss out on points”*;

- the statements used in the Cardholders survey are such that if young people are generally positive about the Card, they may **find it difficult to “disagree”** and once they have agreed they need a reason to justify their response, for example the first statement reads “*To what extent do you agree or disagree that the Card has had a positive impact on your attitude to learning*” – if positive, young people may be inclined to agree with this statement because they wouldn’t like to say it has had a negative impact;
- in response to some of the further questions which sought to probe and understand the responses given on impact, when asked “*in what ways has the Connexions Card helped you to become more informed about careers and choices?*”, a number of young people responded, for example, with “*being able to speak with the Connexions Card Team*”. Given that providing careers advice and information is not a role of the Connexions Card Team, it suggests that some young people have **confused the Card with the Connexions Service**.

4.5 Given these issues, our assessment is therefore that evidence from the impact questions in the Cardholders survey demonstrate generally positive attitudes to the concept of the Card and cannot be used as an indicator of impact. Later in this section, however, we do use some of the evidence from the additional questions (which sought to probe and understand the responses given on impact) to comment on the potential impact of the Card.

### Cardholder Views

- 4.6 As seen last year, Cardholders are generally positive about the potential benefits of the Connexions Card. Evidence from the Cardholders survey and the case study focus groups suggests that:
- redeemers are more positive about the Card than non-redeemers:
    - 86% of redeemers felt that the Connexions Card has a fair amount or great deal of benefit for “*young people like yourself*”, compared to 67% of non-redeemers;
    - between two-fifths and a half of redeemers are positive about the effect of the Card compared to between one-third and two-fifths of non-redeemers;
  - redeemers are more positive in 2004 than they were in 2003, whereas non-redeemers views have remained the same or worse;
  - where the Card is “*embedded*” within a Learning Centre, young people are more positive about the Card.

4.7 Redeemers are most positive about the effect of the Card on their decisions about careers, attitudes to learning and reducing the financial cost of learning. Non-redeemers are most positive about the effect on decisions about careers and reducing the financial cost of learning. Further questions to understand the factors resulting in these positive attitudes identified that the most common unsolicited responses were:

- the rewards and reward points;
- provided useful information/lots of information on the website;
- encouraged me to go to school/college.

4.8 The least common responses were:

- motivated/changed my attitude;
- helped me decide to go to FE/HE;
- makes learning fun.

### **Parents Views**

4.9 Attitudes of a relatively high proportion of parents are also positive in relation to the effect of the Card: one-third agree that the Card has a positive effect on attitudes to learning, punctuality and helping to reduce the financial costs of learning; two-fifths on helping with careers choices; and one-fifth on staying on in education. Parents are more positive about the effect on attitudes to learning and punctuality than in 2003 suggesting wider awareness and usage by Cardholders in 2004.

### **Learning Centre Views**

4.10 Learning Centres were asked about the potential benefits and impact of the Connexions Card (as opposed to actual). In an unprompted question, the most significant benefit for young people cited by Learning Centres was "*Giving students access to financial discounts*" (65%), with only 14% saying it would "*encourage students to attend regularly*" and 5% saying it "*will improve students' motivation to learn*".

4.11 On prompted questions, however, Learning Centres were generally more positive, with between 40% and 50% saying that the Connexions Card might have some effect on attitudes, punctuality, careers choices, staying on and affording education/training.



4.12 The qualitative case studies highlighted the view from some Learning Centres that there was a rather weak link between the Connexions Card and motivation towards learning. Learning Centre contacts described the lack of explicit involvement by the Learning Centre in the Connexions Card as hindering the link the young people can make between the Connexions Card and their attendance, motivation etc. at the Learning Centre they attend.

## Impact on Cardholders

### Evidence of Change

4.13 Comparison of the Cardholders survey with the baseline survey (undertaken in 2002) and longitudinal surveys of 2003 and baseline respondents show that there is **no significant evidence of any direct impact of the Card in terms of changes in attitudes to learning**. A series of attitudinal statements were asked and on the majority of questions responses were similar amongst baseline, longitudinal and Cardholder respondents.

4.14 There were three statements where a difference is recorded:

- a higher proportion of 2004 Cardholders enjoy what they are currently doing than baseline young people;
- more baseline young people expect to be in work in a year's time than 2004 Cardholders;
- significantly fewer 2004 Cardholders, than baseline young people, say that they complete background work and hand assignments in on time.

4.15 For the first two, this difference is more likely to be a function of different characteristics of the baseline and Cardholder respondents. In particular, there is a higher proportion of young people already in work and a lower proportion of females amongst the baseline respondents, compared to the Cardholders 2004 survey. The third statement suggests that Cardholders are actually less committed to handing in assignments and work on time than young people in general.

4.16 A number of statements associated with the affordability of learning/training do suggest, however, that **2004 Cardholders find it financially easier to attend learning/training than baseline young people**. Again, this may be a function of fewer baseline respondents actually being in education/learning at the time of the survey, than 2004 Cardholders. In addition, there is a higher proportion of older young people amongst the 2004 Cardholders. It is not possible therefore to directly link the change to the Connexions Card.

### **Evidence from Unprompted Cardholder Responses**

4.17 A closer look at the Cardholder questions which probed respondents on the factors that contributed to their positive attitudes on impact (as discussed above), indicates that **the Card might be having some positive effect on a small number of Cardholders**. Whilst numbers are very small and therefore should be treated with caution as they are not statistically reliable, they do provide a feel for the potential effect of the Card based on unsolicited responses from the respondents to the survey. The most relevant unprompted responses were:

- “encouraged me to get to school/college” or “improved punctuality”;
- “provided useful careers information” or “a lot of information on the website”
- “helped me decide to go onto further or higher education”;
- “I am motivated/have changed my attitude”:

### **Cardholder Views on Influences**

4.18 A further question asked in the Cardholders survey was for respondents to identify the 2 or 3 most significant influences that have been greatest on their attitudes to learning. Parents, teachers and friends were in the top three for the vast majority of Cardholders. However, for 13% of redeemers and 7% of non-redeemers, the Connexions Card was within the top three.

### Scale

- 4.19 Given that the comparison of the baselines, longitudinal and Cardholder surveys do not provide clear evidence of change, this suggests that the scale of any impact of the Connexions Card is currently negligible. However, Cardholders' unprompted responses and views on influences do suggest that there may be the **potential for the Card to have some effect on young peoples' attitudes**.
- 4.20 There is, however, also evidence of a significant amount of deadweight associated with the Card, given that less than half of the Cardholder sample in 2004 agreed positively with statements about the effect of the Card.

### Characteristics of Target Group

- 4.21 Evidence discussed in the previous section also suggests that the Card is more accessible and successful in engaging those who continue their education at school and are comparatively higher achievers, and less so some harder to reach groups. Qualitative findings from the case studies also supported this view, as follows:
- “the good attendees are the young people who express greater interest in the Card”;
  - “those who use the Card are thought to be more motivated and higher attendees”;
  - “those young people who are not punctual are disorganised and therefore less likely to use the Card”;
  - some of the young people consulted felt that “the Card would have little or no impact on disaffected young people”.

### Impact on Learning Centres

- 4.22 Learning Centre views of the benefits to their own institution from the Connexions Card have declined since 2003:
- 38% of 2004 respondents said there were no benefits associated with the Card for their institution, compared to 21% last year;
  - fewer 2004 respondents feel that the potential benefits for the Learning Centre have been realised – one-third felt benefits had been seen, compared to 49% in 2003.

- 4.23 This change in views may be a function of the “direct” benefits to Learning Centres (for example, improved electronic attendance systems, multi-functionality of the Card linking to access to buildings etc) envisaged (and sold to Learning Centres) at the outset no longer being as apparent. As a result, Learning Centres that are engaged in Card Distribution and/or ARS provision more often view the Card as a good thing for the young people rather than something directly contributing to their Learning Centre’s goals.
- 4.24 ARS users are, as would be expected, more positive than Card Distributors. Work based training providers (two-fifths felt benefits were realised) also tend to be more positive than schools, sixth forms and colleges (around one-third).
- 4.25 Specific benefits achieved were highlighted by 5 of the 51 Learning Centres visited during the case studies, as follows:

***Student Development:***

*“In a work based training provider working with relatively disengaged young people, the contact felt that that young people had been relatively responsive to the Card. The website and the Card had been used by tutors to teach young people about the Internet, and the role of budgeting and on-line accounting. Young people had continued to access the website and claim rewards.”*

***Attendance & Punctuality:***

*“A benefit was the fact that although card readers are no longer being used in the Learning Centre, the young people are now aware that attendance is an issue that is being monitored.”*

*“The key benefit is that it has improved punctuality – it hasn’t solved punctuality problems but it has certainly improved them.”*

*“The Card was an influential tool for a group of disaffected students as they were able to reward them for attendance and punctuality.”* [A special status pre-16 institution]

***Incentive:***

*“The Card encouraged those young people who are doing well.”*

4.26 Potential benefits, not yet realised, were also highlighted during the case studies, including those relating to:

- student development;
- incentives – encouraging attendance, making young people feel more grown up, something nice;
- inclusion – it is available to all, so motivates non-attendees but also provides encouragement for those doing well;
- complementary to EMAs;
- discretionary points will provide flexibility to focus on attendance and motivation;
- multi-functionality.

## 5 FACTORS AFFECTING ACHIEVEMENTS

### Key Points

- Between 2003 and 2004, there has been **an improvement in the awareness and attitudes of Learning Centres** and the extent to which the Card is embedded within a number of Learning Centres. There is, however, considerable potential to engage further Learning Centres in this way.
- **FE Colleges tend to be more engaged with Card Distribution than ARS provision** and face more implementation difficulties with the latter.
- There is a clear **link between the Connexions Card being “embedded” within a Learning Centre and the consequent awareness, usage and benefits for Cardholders**. The evidence suggests that maximum engagement and usage of the Card can therefore be obtained through ensuring awareness and commitment is obtained within Learning Centres amongst staff and students; and explicit association of the Card with learning and attendance.
- **Redeemers show consistently higher levels of awareness, use, ease of use and benefits**, compared to non-redeemers.
- Whilst we report above a general improvement in awareness and attitudes, **commitment and enthusiasm of Learning Centres can still be barriers** to embedding the Connexions Card in many institutions.
- Again, there have been **clear improvements in implementation** since 2003 for many Learning Centres, particularly in terms of satisfaction with ARS solutions. However, a quarter of those responding to the Learning Centres survey highlight continuing **difficulties with promotion, card application/distribution and ARS operability**.
- A range of barriers associated with engaging Learning Centres were highlighted by the Connexions Card Team’s regional account and attendance recording managers. Many of these are associated with communication with Learning Centres, administrative problems within Learning Centres and negative perceptions/attitudes towards the Connexions Card or to Capita.
- **Communication and customer care from the Connexions Card Team has increased over the last year**.
- **Engaging some of the harder to reach groups has been constrained** by decisions not to proactively target Connexions Partnerships (due to their other priorities) and the need to ensure a critical mass is achieved through roll-out.
- Clear **improvements in the range and availability of rewards and discounts** have also been observed.
- Some barriers associated with access to the Card and its functions were highlighted in the Cardholders survey and case studies. Cardholders also made a number of suggestions for improvement.
- **Discount and rewards providers appear to face very few implementation or operational issues** associated with the Connexions Card. However, the anticipated benefits associated with involvement in the Card have not materialised. The views of two national discount and reward providers we consulted are more positive and they are able to cite specific organisational benefits.

## Introduction

5.1 In this section we discuss a range of factors that are affecting the success or otherwise of the Connexions Card. We draw on the views of all stakeholders consulted, including Cardholders, Learning Centres, parents, Regional Account Managers and Attendance Recording managers. We cover the following themes:

- Embedding the Connexions Card;
- Factors affecting embedding:
  - awareness, commitment and enthusiasm;
  - implementation – Card distribution/application & ARS operability;
  - promotion and marketing;
  - Connexions Card Team Communication;
- Engaging the harder to reach;
- Availability of rewards and discounts;
- Barriers to use;
- Suggested improvements.

## Embedding the Connexions Card

### Learning Centre Engagement

5.2 During the case study fieldwork, we sought to identify the number of ARS providing Learning Centres that are considered to be “successful”, in that:

- the majority of eligible young people have a Card;
- the Learning Centre is providing ARS for their young people at least every three months;
- young people are actively and regularly using the Card and website through redemptions and discounts.

5.3 We assessed that 59% of the Learning Centres visited (51) met the first two criteria, but only 24% (12) met all three and therefore could be described as “successful”. In these cases we considered the Card to be fully embedded.

5.4 Whilst this shows an improvement on general levels of embedding within Learning Centres compared to the 2003 case studies, it also indicates that there is considerable potential to engage more Learning Centres. These findings are supported by the Learning Centre survey results, which again show improvements in levels of awareness and attitudes amongst Learning Centres and their staff compared to 2003, but still room for improvement in 2004:

- general awareness amongst all Learning Centres has improved between 2003 and 2004, with the majority of respondents saying that they are fairly or very well informed;
- awareness amongst other staff within ARS providers has, however, declined between 2003 and 2004 – one-third said other staff were not well informed this year, compared to a quarter in 2003;
- around one-third of Learning Centre respondents were positive about the Card, which is similar to last year, though there was a significant drop in the proportion of staff that were negative (from one-third to one-sixth of respondents), with many providing a neutral response;
- 82% of ARS providing respondents said that they had promoted the Card to Cardholders to some extent, but only 37% had done so “a great deal”.

#### FE College Engagement

5.5 Supporting the findings reported in Section 2, the Learning Centre survey suggests that FE colleges are generally more engaged with Card Distributing than with ARS provision. It also identifies that around one-third of FE Colleges do not find the Connexions Card suitable for their institution and two-fifths have experienced implementation difficulties (compared to a quarter of schools with 6<sup>th</sup> forms). Multi-site and multi-age concerns were identified in the more qualitative case studies as barriers to FE College involvement with the Connexions Card, though these also affected a small number of other types of Learning Centre.

#### **Link between embedding and awareness/usage**

5.6 Evidence from a range of the research sources suggests that there is a clear link between the Connexions Card being “embedded” within a Learning Centre and the consequent awareness, usage and benefits for Cardholders.



- 5.7 Evidence from the focus groups undertaken during our case study visits identified that 12% of young people in focus groups where the Card was considered to be more “embedded” were positive about the effect of the Card (compared to 5% of those from all Learning Centres)<sup>16</sup>. This **points to the importance of ensuring awareness and commitment is obtained within Learning Centres amongst staff and students to help ensure maximum engagement with the Card.**
- 5.8 The consistently higher levels of awareness, use and identification of benefits amongst redeemers compared to non-redeemers also supports the **link between the Connexions Card being “embedded” within a Learning Centre and Cardholders’ awareness and subsequent usage of the Card.** Higher levels of usage and benefit have been reported in previous sections. Equally there are higher levels of awareness, which highlight the **critical importance of embedding the Card with learning and attendance in order for the Card to be used:**
- redeemers were considerably more aware that they were registering attendance and/or collecting reward points for learning via the Card – 74% of redeemers said they were registering attendance and 64% said they were collecting reward points for learning, compared to 35% and 16% for non-redeemers;
  - redeemers were also more aware of the number of points they held on their Card – 28% of redeemers didn’t know compared to 69% of non-redeemers (more than for 2003 for the latter);
  - 62% of redeemers said that they knew a great deal or fair amount about the Card and 95% knew how they received points, compared to 31% and 63% respectively for non-redeemers;
  - 91% of redeemers had checked their points and did so more regularly than non-redeemers, 32% of which had checked their points;
  - 95% of redeemers had accessed the website compared to 47% of non-redeemers;
  - non-redeemers have poorer views of the range and availability of rewards and discounts than redeemers – around three-quarters of redeemers think the range of discounts/rewards is good compared to less than 60% of non-redeemers.

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<sup>16</sup> Note that case studies were qualitative consultations and focus groups did not provide a representative sample of young people, therefore these percentages are indicative only are used to provide an indication of differences between Learning Centres rather than a quantitative assessment.

## Factors affecting embedding

### Commitment and Enthusiasm of Learning Centres

- 5.9 Whilst we report above a general improvement in awareness and attitudes amongst Learning Centres since 2003, these factors remain significant barriers to embedding the Connexions Card in many institutions.
- 5.10 Across the majority of LSC areas involved in the case studies, 37% of Learning Centres were enthusiastic about the Card concept and 20% were positive about the implementation process. Success factors reported include:
- awareness of the Card is maintained through regular use of the **card readers** by both young people and staff at Learning Centres;
  - **successful administration** of the ARS results in regular points upload;
  - **strong commitment from the lead contact** in the Learning Centre;
  - **awareness raising by the LC**, e.g. notice board, assembly by CCT, use in ICT lessons;
  - **focused input by the CCT**, e.g. to raise awareness of specific rewards in the locality that the young people may be interested in.
- 5.11 For some Learning Centres their initial **commitment and enthusiasm is beginning to dwindle, or where it has not been embedded, this is due to a combination of technical difficulties and conflicting priorities** within the LCs.

### Implementation

- 5.12 Overall, the Learning Centre survey suggests **some improvement in implementation since 2003**. Around 60% of ARS users and Card Distributors found implementation relatively easy in 2004, compared to around 50% of ARS users and around 40% of Card Distributors in 2003. However around **a quarter of Learning Centres still highlighted difficulties** with implementation. In addition, 64% of the case study Learning Centres demonstrated relatively negative attitudes towards the Card's implementation, which may affect their overall levels of commitment and enthusiasm. Particular problems highlighted include:
- limited promotion of the Card;

- nature of the Learning Centre's enrolment process, which meant that it was not possible to get the Card to all young people;
- nature of ARS – where points are uploaded by the administration department, young people are less aware of this happening and therefore the Learning Centre must work harder to engage them;
- administrative burden of ARS;
- limited staff awareness – in some cases the lead contact has not been able to engage all Learning Centre staff in the Card;
- lack of a photo visit (where Learning Centres opt to send through their own photos, young people miss the initial opportunity for engaging with the Card).

5.13 A key finding from the evaluations of the pilots of additional smartcard functions (funded by ODPM) was that effective project management and communication between the Connexions Card Team and the Learning Centre (and/or function lead if appropriate) is critical to successful implementation.

5.14 A range of **barriers associated with engaging Learning Centres** were highlighted by the Connexions Card Team's **regional account and attendance recording managers**:

- making contact with the most appropriate person when making initial contacts to Learning Centres;
- Learning Centre cynicism/scepticism of the concept, e.g. "Big Brother through the backdoor";
- negative perception of Capita and thus put off by Capita's involvement;
- reluctance to be involved where a Learning Centre does not believe they have an attendance problem;
- reliance on the Internet to upload data and often the Learning Centre's Internet settings will not permit this;
- resolving issues where a Learning Centre has been "mis-sold" a system in the first place;
- Learning Centre internal administration issues;
- not enough national advertising of the Card to increase awareness;

- negative experiences of the Card spread by word of mouth make it difficult for the Connexions Card Team to engage Learning Centres;
- the Card is not compulsory and therefore not a priority for teaching staff.

#### Card Distribution/Application

5.15 The case study evidence pointed to some improvements and elements of good practice in the Card application and distribution. However, some difficulties were still being experienced, including:

- problems with flexibility to issue cards to the disengaged;
- mistakes being found on some cards;
- not knowing who has a Card as they are sent to home address;
- delays in receiving the cards and replacing lost cards;
- PIN numbers not being received;
- arranging additional photo visit for those that had missed the initial one.

#### ARS Operability

5.16 The Learning Centre survey points to an improvement in satisfaction with the ARS solutions amongst Learning Centres:

- 63% of ARS users were satisfied with their solutions, compared to 42% in 2003;
- work based training providers were the most satisfied (63%) and around two-fifths of schools and colleges were satisfied;
- just under one-third of Learning Centres had tried to use more than one ARS system in 2004, compared to just under a half in 2004.

5.17 However, around one-third of ARS users said they had experienced technical problems with their ARS software. In some of these cases, this has not only had an adverse effect on the actual impact of the Card, but has also highlighted a need for support and guidance to ensure that ARS systems are effective so that the Card can have a positive impact on the Learning Centres and young people involved.

5.18 The card readers seem to cause the most problems with one Learning Centre describing the hand held card readers as not very user friendly – *“embarrassingly simplistic with few functions”*. In other Learning Centres, the card readers were used but are not being used any longer because it was difficult to train all the staff, they were unreliable and they did not provide the necessary attendance information for the school.

5.19 Some Learning Centres did, however, have positive comments:

- *“the problems encountered have now been ironed out”*;
- *“the flexibility to award points as suited their establishment is good”*;
- *“following a strict routine has enabled the process to become embedded in everyday activities”*;
- *“the ARS is working well with the interface or there are no issues”*.

### **Promotion and marketing**

5.20 It was suggested in all case study LSC areas that promotion and marketing of the Connexions Card is an area that needs attention. It was felt that the Connexion Card Team’s role in promoting the Card was minimal, and that further support was required. Young people need to receive more regular information about the Connexions Card in terms of where it can be used. Most Learning Centres would like additional information to support them to promote the Card, particularly Learning Centre level information about how many young people are using it, where it can be used and what some of the rewards are that have been redeemed in the area.

### **Connexions Card Team Communication**

5.21 Evidence from the Learning Centre survey demonstrates the significant increase in communication and customer care from the Connexions Card Team over the last year – 55% of ARS users had had a visit or presentation from the Connexions Card Team, compared to only 14% in 2003. In addition, 31% of Learning Centres cited helpful Connexions Card Team staff when asked about what had helped with the implementation process.

5.22 The Connexions Card leaflets were found to be useful by 83% of the Learning Centres responding to the survey.

5.23 However, although many Learning Centres described the Connexions Card Team as supportive, there were still areas for improvement. A number of Learning Centres had experienced problems with implementation and sometimes the Connexions Card Team had not successfully resolved the problems, with this resulting in some of these Learning Centres ceasing to award points. Other comments included:

- *“the Connexions Card Team are not efficient”;*
- *“they turned up late for photo visits and did not allow enough time”;*
- *“they appear to be reactive rather than proactive”;*
- *“the first contact is with the head of Sixth Form/SMT who don’t necessarily know whether the Card will be compatible with current technology/registration systems”;*
- *“lack of contact by the Connexions Card Team slows progress in embedding the Card”;*
- *“limited understanding of Learning Centre needs and capabilities”.*

### **Engaging the Harder to Reach**

5.24 Engaging some of the harder to reach groups in the Connexions Card has been constrained by:

- the Connexions Card Team deciding not to proactively target and engage Connexions Partnerships (the main route to this client group), which have had a difficult year focused on more mainstream priorities;
- roll-out was focused on reaching a “critical mass” necessary for success of the Card, which meant targeted those that were, initially, easier to reach.

### **Availability of Rewards and Discounts**

5.25 Improvements in the availability and nature of discounts are evident from a number of sources:

- both redeemers and non-redeemers responding to the Cardholders survey find it easier to access discounts in 2004 than in 2003 (a combined proportion of 44% found it very or fairly easy in 2003 compared to 62% in 2004);

- 10% of those identifying use of the Card as difficult in the Cardholders survey said that there were no discounts in the area – a significant improvement on the 2003 survey when 24% reported this difficulty;
- redeemer views of the range and availability of discounts and rewards have improved considerably since 2003 – in 2004 more than 75% thought the range was fairly or very good and around 50% thought the availability was fairly or very good (compared to 57% and 28% in 2003, respectively);
- a slightly higher proportion of non-redeemers also view the range of discounts as good (58% this year compared to 53% in 2003), however the range of rewards is considered good by only 46% of non-redeemers a slight decrease from 51% in 2003.

5.26 However, the case studies did highlight some practicalities associated with rewards and discounts that could be improved:

- rewards are often out of stock;
- some rewards have not materialised;
- the “coming and going” of various rewards and discounts;
- local accessibility to the rewards and discounts;
- concerns about the range;
- discounts/reward provider awareness;
- infrastructure not in place for rewards and discounts to work effectively;
- potential lack of consultation with the young people as to what rewards and discounts they may be interested in.

5.27 Other comments relate to the potential for the rewards and discounts to motivate young people:

- *“there is nothing I really want to save for”*;
- concerns about the significance of the rewards and discounts to act as an incentive for learning;
- *“in Sixth Form we have chosen to be here so we aren’t interested in getting points for attendance”*.

## **Barriers to Use**

5.28 Further indications of limited engagement by non-redeemers are provided by responses to questions about how easy the Card is to use. The majority of redeemers find the Card relatively easy to use – more than three quarters said they found earning points, accessing rewards and accessing discounts fairly or very easy. Only two-fifths of non-redeemers found earning points and accessing discounts fairly or very easy and under one third found claiming rewards easy.

5.29 Part-time learners tend to find it more difficult to earn reward points and access rewards. Learners in the northern region also tend to find it more difficult to earn reward points.

5.30 Factors affecting ease of use for the Card, as highlighted by the Cardholders survey and case studies, include:

- shops don't recognise the Card for discounts (23% of those with difficulties identified);
- being refused as proof of age (22% - a dramatic increase, where only 1% reported this) in 2003;
- don't know how to exchange points (18%);
- problems with access to the website (24% of those that have accessed the website), including difficulty in getting on, navigation, forgetting PIN or it doesn't work;
- availability of other cards;
- decrease in awareness due to no longer ARS operational.

### **Suggested Improvements**

5.31 The respondents to the Cardholders survey identified the following improvements:

- improved awareness advertising;
- more places that accept the Card;
- better choice of rewards;
- better choice of discounts;
- more information about the Card;
- for type of rewards & discounts:
  - better clothes discounts (same as last year);
  - CDs (an increase on 2003);
  - major shop discounts;
  - leisure;
  - cinema.

5.32 In comparison to 2003, the issues are fairly similar but the level of response is much higher in 2004 with regard to awareness and discounts. This latter point is initially surprising given the improvements reported in relation to discounts, but it could relate to the high interest in using the Card for discounts.



5.33 Non-redeemers report a higher demand for more information, whereas redeemers report higher levels of operational improvements (better rewards, discounts, acceptance of the Card). Presumably this reflects their different stages of use of the Card, with redeemers already having good awareness levels.

### **Discount and Reward Providers**

5.34 Overall, the quantitative survey of discount and reward providers shows that providers face very few implementation or operational issues. However, the anticipated benefits associated with involvement in the Card have not materialised. Mostly they describe young people as disinterested in the Card suggesting that the key improvements required are awareness-raising amongst young people and the provision of further information for the providers.

5.35 The views of the two national discount and reward providers we consulted are more positive. In particular, they are able to cite specific organisational benefits. This is likely to be related to the change in focus of the Connexions Card Team in engaging national discount providers and a greater involvement with the Card due to their profile as a national organisation.

## 6 ACHIEVEMENTS, CONCLUSIONS & RECOMMENDATIONS

### Achievements in 2003/04

- 6.1 The **step change in approach reported in the second annual report has continued** over the past year. Its effects have been particularly noticeable in the last 6 months when performance against targets for Learning Centre and young peoples' engagement has improved considerably.
- 6.2 There is evidence that the **model of delivery is achieving the “right first time” principle more often** which has helped to address a number of the barriers seen in previous years.
- 6.3 **Young people that are engaged remain positive** about the Connexions Card, with an increase being seen in the awareness, usage and benefits for redeemers in particular. A gap is emerging between redeemers and non-redeemers in terms of both awareness and attitudes to the Card. The research suggests that the link between embedding the Connexions Card within the Learning Centres and with learning is critical to success.

### Intended Aims and Outcomes

- 6.4 **Figure 7.1** overleaf provides a summary of achievements against intended aims and outcomes for the Connexions Card as identified at the outset of the project.

**Figure 7.1: Summary of Achievements**

<p><b>Aim 1:</b> Encouraging more young people to remain in learning and motivating them to fulfil their full potential by rewarding their attendance and application through the provision of a range of discounts</p> <ul style="list-style-type: none"> <li>• <i>There is no clear evidence of a direct impact on attitudes to learning</i></li> <li>• <i>Between one-third and two-fifths of the Cardholders (with points), Learning Centres and parents surveyed are positive about the potential benefits of the Card</i></li> <li>• <i>Some of those participating in the Cardholders survey identified some effects of the Card</i> (though sample sizes are not statistically reliable), including “helped me decide to go onto further or higher education”; and “change in motivation/attitude”.</li> </ul>
<p><b>Aim 2:</b> Helping more young people to remain in learning by reducing some of the financial barriers to learning by giving access to a range of further discounts, on public transport, books and equipment.</p> <ul style="list-style-type: none"> <li>• <i>There is no clear evidence of a direct impact on financial barriers to enable young people to remain in learning</i></li> <li>• <i>15 national retailers are currently providing rewards and discounts associated with transport, books and equipment</i></li> <li>• <i>In August 2004, 31% of the rewards claimed were related to study/travel/equipment</i></li> <li>• <i>Between one-third and two-fifths of the Cardholders (with points), Learning Centres and parents surveyed are positive about the potential benefits of the Card</i></li> </ul>
<p><b>Aim 3:</b> Improving the career and life choices by providing better information through a website.</p> <ul style="list-style-type: none"> <li>• <i>There is no clear evidence of a direct impact on careers choices</i></li> <li>• <i>Between one-third and two-fifths of the Cardholders (with points), Learning Centres and parents surveyed are positive about the potential benefits of the Card</i></li> <li>• <i>Some of those participating in the Cardholders survey identified some effects of the Card</i> (though sample sizes are not statistically reliable), including helping with career choices/decisions</li> </ul>
<p><b>Outcome 1:</b> Improved levels of motivation, attendance and application in further learning.</p> <ul style="list-style-type: none"> <li>• <i>There is no clear evidence of a direct impact on attitudes to learning or attendance</i></li> <li>• <i>Between one-third and two-fifths of the Cardholders (with points), Learning Centres and parents surveyed are positive about the potential benefits of the Card</i></li> <li>• <i>Some of those participating in the Cardholders survey identified some effects of the Card</i> (though sample sizes are not statistically reliable), including punctuality and motivated/changed attitudes</li> </ul>
<p><b>Outcome 2:</b> A contribution to increased levels of participation and attainment in further learning.</p> <ul style="list-style-type: none"> <li>• <i>No clear evidence of impact on participation and attainment</i></li> </ul>
<p><b>Outcome 3:</b> Up to 1.7 million young people using the Connexions Card in steady state.</p> <ul style="list-style-type: none"> <li>• <i>1.7 million is an unrealistic target to have been set, given that in the CSF paper, the CCT identified 1.5 million as the “potential cohort who could carry a card”</i></li> <li>• <i>Achieving this outcome (i.e. to have significant numbers of young people “using the card in steady state”) remains a considerable challenge</i></li> <li>• <i>Current MI shows that 3.7% of the cohort are claiming rewards and indicative estimates show that 5.5% of the cohort may be accessing discounts</i></li> </ul>
<p><b>Outcome 4:</b> The Card will be available in all regions across England and in a wide range of institutions, including informal settings such as Youth Service and community projects as well as schools, colleges and training providers.</p> <ul style="list-style-type: none"> <li>• <i>The Card is available across all regions and a wide range of institutions. It is not possible to comment on the level of penetration within regions</i> (see Section 3 (3.8) for further detail).</li> <li>• <i>The potential to gain reward points is also available in all regions – on average at around 88 Learning Centres per region. Again we do not have sufficient information to comment on the proportion of the Learning Centres engaged within a region.</i></li> <li>• <i>There are few opportunities for Card access and use within informal settings</i></li> <li>• <i>The Card tends to be less accessible to the hard to reach and NEET groups</i> (see paragraph 31 above for reasons why)</li> </ul>

**Figure 7.1: Summary of Achievements**

<p><b>Outcome 5:</b> The Card will be used to provide the electronic recording of attendance in all learning centres that wish to take advantage of this function; to help enhance and modernise electronic data collection systems in post 16 institutions; assist in the validation process for the payment of the Education Maintenance Allowance; create minimum disruption to school business.</p> <ul style="list-style-type: none"> <li><i>The card reader solution is used by around one-third of ARS users; the potential to “enhance and modernise electronic data collection systems in Post-16 institutions” is limited</i></li> <li><i>27 Learning Centres are using the Connexions Card system to assist in the validation process for EMAs, providing access to EMAs for 0.04% of the 16-19 cohort.</i></li> <li><i>Whilst minimum disruption was not evident in the initial roll-out (evidence from previous phases of the evaluation pointed to the inadequacy of the system compared with others available) improvements in customer care have resulted in more positive attitudes amongst Learning Centres in 2004</i></li> </ul> <p><i>Note, however, that lessons learnt through the first years’ delivery of the Connexions Card (in particular that the card reader solution was not universally effective nor the main vehicle for delivery) means that the Connexions Card Team no longer expect this outcome to be achieved and they have deliberately not promoted the Card as a solution for EMAs.</i></p>
<p><b>Outcome 6:</b> The Card will be able to reward voluntary activity and the achievement of learning related goals, especially by those who are socially excluded/hard to reach.</p> <ul style="list-style-type: none"> <li><i>The Card is able to reward voluntary activity and the achievement of learning related goals</i></li> <li><i>The use of the Card for this purpose is relatively small. 0.1% of the cohort are receiving points for these activities, which are being awarded by 29 voluntary organisations, 5 Connexions Partnerships and 5 Learning Centres</i></li> <li><i>The Card is currently more accessible to and engaging more of the higher achievers</i></li> </ul>
<p><b>Outcome 7:</b> Young people will be able to access a wide range of discounts and rewards including transport, leisure and High Street discounts and opportunity rewards that are valued by young people. These discounts and rewards will be a mix of national and local.</p> <ul style="list-style-type: none"> <li><i>There has been an increase in access to discounts and rewards in 2004, reflecting an improvement in the range and accessibility</i></li> <li><i>15 national retailers are currently providing rewards and discounts associated with transport, books and equipment. In August 2004, 31% of the rewards claimed were related to study/travel/equipment</i></li> </ul>
<p><b>Outcome 8:</b> Facility for automatic enrolment of students onto courses in colleges and training providers.</p> <ul style="list-style-type: none"> <li><i>We are not aware that the automatic enrolment facility is available</i></li> </ul>
<p><b>Outcome 9:</b> Comprehensive website which will contain details of courses nationwide and careers information as well as health and lifestyle information and CV creation.</p> <ul style="list-style-type: none"> <li><i>A website is available and has been improved over the last 12 months</i></li> <li><i>2% of Cardholders are accessing the CV builder and careers pages</i></li> </ul>
<p><b>Outcome 10:</b> To build on the platform laid down through the Card’s basic functionality and develop wider initiatives such as an e-purse facility and other SMART card solutions</p> <ul style="list-style-type: none"> <li><i>A number of pilots have been undertaken to test additional functionality which have shown that the technology is effective for, for example, cashless catering, e-voting and transport functions. Some of these functions are continuing to be used in the pilot areas</i></li> <li><i>There are a number of lessons about implementation which will need to be taken on board for future roll-out to maximise the potential benefits for young people</i></li> <li><i>Further developments are under consideration</i></li> </ul>
<p><b>Outcome 11:</b> The Card will contain details that will allow it to be used as a proof of age card whereby, should they choose to do so, young people will be able to show it to prove their entitlement to age restricted goods and services.</p> <ul style="list-style-type: none"> <li><i>Around 50% of redeemers and 40% of non-redeemers in the Cardholders survey were using the Card for proof of age. Whilst we do not have access to information on the availability and usage of comparator cards (such as the Citizenship card and NUS Associate card), we understand that the Connexions Card could currently be the most widely available proof of age card for 16-19 year olds in England and based on these figures, possibly the most widely used.</i></li> </ul>

## Conclusions

- 6.5 The Connexions Card project has a considerable way to go to achieve the aims and outcomes originally set:
- there is no evidence that the original intended impact is yet being achieved, though there is indicative evidence that the Card may be having some effect on some Cardholders;
  - in terms of numbers of young people using the Card, considerable progress has been made over the last 12 months, though numbers remain small compared to original expectations;
  - access and usage tends to be from the more highly qualified and easier to reach young people;
  - benefits to Learning Centres are limited given that the card reader solution did not provide the originally intended improvement in electronic data recording systems and a decision was taken not to press learning centres to use the automatic enrolment function.
- 6.6 There has been a significant improvement in engagement of Learning Centres and young people particularly over the past year. Progress has also been made on a number of outcomes related to rewards and discounts, website, trial of additional functionality and use for proof of age.

## Context Issues

- 6.7 Although we are not aware of the details of the contract between the private and public sector partners we believe that it may have distorted the style and direction of Connexions Card roll-out; in particular, the initial emphasis on volume rather than quality embedding. In hindsight it would have been better to devote the whole of the first year to developmental activity; more extensive piloting and testing.
- 6.8 The highly innovative and experimental nature of the Card perhaps required a greater flexibility in approach and delivery than can be easily captured in a performance related contract.

- 6.9 The initial identification and then revision of Critical Success Factors by the PPP Board was recognition that the original targets for the Card were not feasible. There is therefore a need to formally review and revise the aims and outcomes for the Card. This is especially the case given that the views of the Connexions Card Team of the purpose of the Card have themselves changed.
- 6.10 The question that remains, however, is what would be the realistic expectations for the Card in this new context? The negotiations on targets seem to have focused on what is achievable, which is appropriate, but there is also clearly a need to consider whether what is achievable meets policy and value for money objectives. What is the critical mass in terms of volume, usage and functionality required for the initiative to be considered a success? What would represent value for money in policy terms?
- 6.11 However, irrespective of this question, there may be little incentive for the private sector partner to do anything other than deliver the contract. The contract may still, therefore, remain a barrier to targeting the product in the most policy effective way, given that there appears to be no incentive for risk-taking.

### **Recommendations - Issues for the future**

- 6.12 In addition to the questions about success and value for money, there is a series of issues that we recommend should be considered in taking forward the Connexions Card project, including:
- Some of those consulted have suggested that the Connexions Card has reached saturation point in terms of engaging Learning Centres in the provision of attendance information – if this is the case, there are implications for overall potential achievements in terms of scale and benefits. If this level had been expected at the start, would the project have been launched?
  - Continued effort and significant resource will be required to:
    - maintain the commitment of the more “successful” Learning Centres and engage others that still face some barriers;
    - focus on the awareness, usage and attitudes to engage more of the non-redeemers;
    - access the harder to reach and NEET target groups;

- The Connexions Card Team have to an extent been playing catch-up over the last 18 months due to a slow start to the Partnership and delivery – there are some key lessons associated with this type of partnership/initiative that have been highlighted through the delivery of Connexions Card that might be helpful to other/future government initiatives, including, for example:
  - clarity of purpose, outcomes and critical success factors from the outset;
  - piloting, testing and implementing a quality product in one region before rolling out nationally;
  - considering in full the implications of previous pilot evaluations;
  - the resource, negotiation skills and complications associated with initial contracting and on-going contract management;
- There are also lessons regarding the operation of public private partnerships and level of risk-taking, when delivering an initiative whose development, impact and profile are unclear. The Connexions Card project perhaps provides a useful case study for future operation of PPPs with initiatives of this nature;
- There may be benefit associated with conducting some focused research in some of the more successful Learning Centres to, for example, collate records of punctuality and attendance and conduct surveys of learner attitudes and motivations. This may provide more specific evidence of impact of the Connexions Card in a successful environment;
- There should be a final wrap-up evaluation in 2006/7 linking this assessment to the final outcomes.

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