

Commercial in Confidence



matrix Accreditation Review Report

For

CALDERDALE AND KIRKLEES CAREERS LTD

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On behalf of emqc Ltd

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1. Executive Summary

Having carried out the Accreditation Review in accordance with the guidelines provided Calderdale and Kirklees Careers Ltd has demonstrated that it continues to meet the **matrix quality standard for information advice and guidance services**. Continued Accreditation to the **matrix** Standard is granted for the external services provided by Calderdale and Kirklees Careers Ltd.

This Accreditation Review Report details the services provided by Calderdale and Kirklees Careers Ltd and includes a brief description of the organisation, the Assessment methodology and an overview of how the organisation demonstrated that it continues to meet the **matrix** Standard.

2. Introduction

Calderdale and Kirklees Careers Ltd has changed little in terms of its geographical coverage, ethos and operation since the initial Assessment in 2008. The careers and IAG service nationally is dealing with significant uncertainty and funding cuts since the recent change in government and the planned introduction of the All Age Guidance Service. Calderdale and Kirklees Careers has responded to these uncertainties and pressures by effectively managing real reductions in funding whilst attempting to limit the impact on users of the services. With the added implications of working within two Local Authorities, the organisation has strategically positioned itself as well as possible to be prepared for future changes and reductions.

Covering the geographical areas of Calderdale and Kirklees, Calderdale and Kirklees Careers Ltd. continues to provide a Connexions service for young people between 13 and 19. This offers IAG in 65 schools and colleges as well as drop in and appointments through its Connexions centres, in Huddersfield, Halifax and Dewsbury. Services to adults are provided through the three Connexions centres and within the community. The service also provides training to its own staff and external candidates through CK Training.

Visits were made during the Accreditation Review to the three Connexions Centres in Huddersfield, Halifax and Dewsbury as well as to a Young Persons Project, a Sixth Form College and a training venue. The variety of visits offered a clear picture of the continuing breadth of service, the geographical differences and similarities, and the ways in which clients, staff and partners delivered and received IAG support.

Considering the current climate of unease and future concerns for Careers Services nationally, staff members were upbeat and positive about their work and the impact of it. Without exception, all staff interviewed considered themselves 'well looked after' by the company and valued the input of information updates.

During the initial Assessment of Calderdale and Kirklees Careers in 2008, the organisation had brought together the young peoples, adults and training services to be assessed against the matrix Standard together for the first time. Prior to this, only the careers service for adults had been assessed and accredited to the matrix Standard.

The objectives for the initial Assessment therefore, had been carefully considered to take into account some of the changes. These included:

- to ensure the whole service was operating to the standard required for matrix accreditation
- to consider geographical differences and innovative methods of delivery across the organisation
- to offer feedback to the executive in order to further develop the services available

Feedback had been given on these areas during the Initial Assessment and it was felt at this time, that the key objective for the Accreditation Review was to demonstrate continued performance to the standard required and to retain the matrix Standard. The agreed objective for the Accreditation Review was therefore:

- to demonstrate the required quality to retain the matrix Standard

3. Methodology

A range of methods was used to gather evidence against the **matrix** Standard;

Site visits to Calderdale and Kirklees Careers HQ, Halifax, Huddersfield and Dewsbury Connexions Centres, Dewsbury Probation Office. Project Challenge, Huddersfield Training Venue.

One to one interviews with 8 members of staff, 3 partners and 11 clients

Telephone interview with 1 partner

Informal group interviews with 30 members of staff, 2 partners, 30 clients

Observation of reception services, at HQ and in centres. Observation of information resources. Informal observation of IAG delivery with adults and young people

Extensive document review including marketing materials, website, intranet, statements of service, Action Plans, strategic and operational planning and evaluation reports, Staff and client surveys, training plans, appraisal information.

4. Strengths

During the Accreditation Review, the following strengths were identified. These are outlined below. The numbers and letters in brackets refer to the relevant elements and criteria in the **matrix** Standard.

- As in the Initial Assessment, the level and quality of information resources on offer to a wide range of clients, staff and partners was a significant strength. In the context of reduction in funding for IAG services, the decision to retain the information offer, albeit with some changes in printing for example, has strategically placed Calderdale and Kirklees Careers as the key information source for Careers related resources in the area. The ability to negotiate with schools and other providers in terms of their electronic and hard information needs could be a key factor in the future and this is

understood fully by managers and staff. The range continues to be effective for use with a wide range of clients, partners and customers. (3a,b,c,d)

- A continued strength from the Initial Assessment, the quality of the staff team, their professionalism, readiness to support and assist, and their pride in working for Calderdale and Kirklees Careers is considered by many clients and partners to be a key factor in the positive service received. Throughout the Accreditation Review, staff were praised for their level of service and ability to rise above current issues to offer a service which was extremely highly regarded and considered second to none in the area.(4a,e,)
- Staff were very positive about the level of support they received from all levels of management. They described how well 'looked after' they felt by the company and this was reflected in their efforts to provide the best possible service they could. From the information available regarding current and future changes, through supervision and appraisal, staff believed they were trusted and valued as members of the wider team.(6e)

5. Areas for Continuous Improvement

In addition the following areas where further development may improve the quality of service were identified. The numbers and letters in brackets refer to the relevant elements and criteria in the **matrix** Standard.

- Recent changes to funding have meant that there is less parity across the Calderdale and Kirklees areas. Centres in the Kirklees area remain fully open whereas in Calderdale, changes have been made to opening hours. Consideration could be given to extensive evaluation of such changes in order to clarify impact and provide evidence for further possible future changes to services in both LA areas. (1d,2d,4a,8d)
- There is a wide range of formal and informal evaluation across most areas of the company. There is less feedback and evaluation in relation to young people with learning difficulties and disabilities and their parents' experience of the service. The organisation may find it beneficial to consider evaluation of such services from the young persons, parents, and educational viewpoints in order to provide effective continuous quality improvement to services. (7c,8d)
- Staff of Calderdale and Kirklees Careers have traditionally offered over and above the stated IAG service and this has in turn created the ethos of help and support for clients as a key priority. There is currently, however, a climate of significant change and there is potential for staff to continue to attempt to offer extended services to all. If this is not possible now or in the future because of funding constraints, the company may wish to consider a strategy of educating and informing staff of the real implications of possible changes and begin to tackle methods of dealing with both client and staff expectations. (6b,e)

6. Detailed Findings against the matrix Standard

The following information is a summary of the findings against each element and should be read in conjunction with the previous sections.

1.

People are made aware of the service and how to engage with it

The Calderdale and Kirklees website, www.workabout.org.uk describes in detail the purpose, expected users and services provided. It states the key aim: to reduce the number of local people not in employment, education or training. The Mission Statement is:

'Helping people to realise their full career and learning potential'.

Many of those interviewed had used the website and liked it. They found it easy to navigate and helpful. The site is user-friendly, accessible and stimulating. One of the benefits of the website, according to clients and partners interviewed was that it offered information about virtually anything to do with careers. Although not everyone had used the site extensively, one client commented that:

"I spend hours on it. I am a bit of a geek but it's a really good site with everything you need"

People are made aware of the range of IAG services according to their needs and preferred

communication methods. Anyone can ring the Learningline for help on any aspect of their IAG needs. Personal Advisers working in schools plan effectively to work in conjunction with careers coordinators to establish the best methods of promoting and marketing services amongst students. As in the Initial Assessment, presentations in assemblies, parents evenings, access to tutor groups and individual interviews provide essential information about the services on offer. In the college visited during the assessment, posters and signage clearly gave information on the services available from Calderdale and Kirklees Careers. For unemployed clients, posters, leaflets and other written materials, appropriate to their needs promoted the services on offer. For example, the language and colour of leaflets and flyers for adults was different from those for young people. Events are either organised by, or attended by staff to ensure that any multi agency forums have a presence from Calderdale and Kirklees Careers.

Word-of-mouth was still found to be a key method of promotion for the service. Some of the adult client interviews had heard about the service from friends and family members and young people interview were aware through friends who had accessed projects, apprenticeships and work. Some of the clients interviewed had not been aware of the service except by word of mouth, but felt that this personal recommendation was a positive one. Two of the adults interviewed commented that if a friend had not directed them, they would not have known about the service. They were slightly concerned that some people may not know others who had used the service and could be disadvantaged.

Outreach work continues to offer a means of promoting the service to those less likely to access centres. Staff use direct contact with clients in outreach venues as well as working very closely with partner organisations and a wider network to ensure the message gets to people about the service on offer.

In all centres visited efforts had been made to be inclusive. For example, use of maketon signage and easily readable publicity materials ensured that consideration was given to those with literacy or communication difficulties. Use was also made of the skills in interpretation of specific members of staff in terms of welcoming those with English as a second language into the service.

A marketing and communications plan ensures that strategic planning of all promotional activities works within the context of the overall Business Plan and can be measured in terms of impact.

2.

People's use of the service is defined and understood

Staff described the importance of getting the message across regarding the service on offer, as clearly as possible. In order to achieve this, people were offered a full description of the service in a variety of ways. As in the Initial Assessment, written material was available in a range of design styles, explaining the service on offer, how to access it and the breadth of the support available. This was the case for all aspects of the service to adults, staff, young people and the wider network. Staff interviewed were able to explain how they would inform a client of the service on offer during the first contact with that individual. Some sessions to introduce the service were carried out in groups and clients who had received this introduction were happy with their knowledge and understanding. This was consistent across all those interviewed, each member of staff, ensuring that their client fully understood the process before moving forward into the next phase of the interaction. Informal observations of interviews with adults demonstrated this in practice.

Clients interviewed were able to remember being informed of the confidential nature of the interview, and of how their information would be stored. All of those questioned believed

that the service staff would treat their personal information confidentially. There was information on display to remind clients of the confidential nature of the session with their adviser. This was clear and easily understood.

Some services offered were different depending on the group to which a client belonged. For example, adult clients were clearly briefed about the terms of the Next Step contract and knew what was on offer to them. Within schools, for example, levels of service included those with minimal intervention through to those with intensive intervention. During the assessment, interviews were held with clients accessing the full range of services, and each one interviewed fully understood the service on offer to them. Staff commented that they were able to consider how best to manage their own caseload and to ensure all of their client group understood the service available to them.

Feedback and evaluation throughout all aspects of the organisation ensure that where service levels may change, clients and staff are consulted in order to work together towards a most effective outcome.

Extensive use of partners, signposting and referral organisations was used throughout Calderdale and Kirklees Careers service delivery. Staff were able to describe situations where signposting to related organisations takes place. A college and a young persons foundation project demonstrated this when visited by describing recent referrals. The level and quality of knowledge and understanding of potential referral organisations was extremely high and the assessor found that staff took pride in ensuring that referral and signposting information was correct and appropriate to the individual client. This was the case for adult and young peoples services.

Feedback from clients included:

"They give you loads of information about everything, like how they can help and where they might send you. It's all good"

"I know it's confidential unless I've done something bad to myself or someone else!"

"She's been trying to get me to come here for ages and in the end she walked down with me because I was scared to go in on my own. It's brill and I've told my mates about it now."

3.

People are provided with access to information and support in using it

Information continues to be a real strength of the organisation. The range of information and resources available to staff and clients is extremely effective. The vast range includes, careers information, FE, HE, LDD, International learning and work, job search skills, basic skills, training availability, course information, local and national employer information, legislation, to name some of the catalogue. A central resource is held within headquarters. This resource is effectively managed by dedicated professionals. Much of the information held within headquarters is duplicated and available in the 3 centres, and relevant information in schools. This information is managed within centres with HQ support and systems are in place to ensure regular ongoing trawls, section by section. All information systems are centrally quality assured and staff interviewed fully understood the need for information to remain current, relevant and appropriate to need. A catalogue detailing all information held is in place and is updated regularly to ensure the information held is effective and fit for purpose.

The Learning Line based also at headquarters, is considered a highly effective source of information by clients, partners and staff. The resource, staffed by careers and information specialists and is available to all staff and all clients for any resource issues. The service was promoted widely and extremely well used. During the Initial Assessment, this resource was considered highly effective in supporting IAG work. During the Accreditation Review, it

was equally well respected. Many staff commented that without the learning line they would find it difficult to find some specific information or would be spending precious time searching.

When producing information materials care had been taken to ensure as wide an audience as possible in terms of readability, relevance and ease of understanding. All information produced was quality assured and feedback was sought from the clients materials were aimed at. For example, clients considered one of the centre window areas to be less engaging than they would like, so they were involved in thinking about how to better display information, making it more attractive and useful to them and other clients.

In the Initial Assessment, there had been extensive use of paper resources, and although this was still the case, decisions had been made to reduce some printing costs and offer more electronic information. Informal evaluation had not shown any reduction in service or satisfaction at the time of the Review. For those wishing to use electronic information sources, there continues to be a range of relevant effective resources available in centres and online. The workabout website is extensive and has a significant range of information across many subject areas. Feedback on the website during the Review suggests that this is a very highly respected and used facility from both young people and adults.

All staff were able to explain how they would ensure clients understood information. Observation of reception duties demonstrated that staff were able to show clients how to use computer resources and find paper information. Young people described how their PA had shown them or gone through information they didn't fully understand.

4.

People are supported in exploring options and making choices

One of the key strengths of the organisation is the professionalism and commitment of the staff. This manifests itself in the level of service offered. Many of those interviewed during the Accreditation Review spoke about the trust they had in their adviser and how they felt they had gained substantially from the session. Partners commented on the delivery of a professional impartial service at all times.

Throughout the Review staff were able to describe and demonstrate the ways in which they ensured an impartial and objective service. During observation of interviews with adults and reception duties it was clear that staff would not 'tell' the client what to do, but would offer the possibilities for them to then consider. Those interviewed were able to describe the ways in which their adviser had explained to them what was on offer and what was not available. All clients interviewed understood what would happen next and how they would be offered support. During group sessions, clients were able to describe how advisers presented options and choices to them in ways which enabled them to fully understand the decisions facing them. All clients believed that the decision was their own, and although they could seek help to make a decision, the adviser would not make it for them.

The mission of the service to help people realise their full career and learning potential was apparent during interviews with staff, partners and clients. Feedback was positive and people believed they had been offered specific effective support to move forward in their learning and work.

Comments from clients included:

"He made me feel there could be a light at the end of the tunnel"

"I would definitely recommend this to others."

"I feel happy and calm, She's really opened things up for me and done an action plan. She showed me the TDA website and things are looking really positive for me now"

"I put a note on facebook to ask what people thought about it as I hadn't been for 8 years. Quite a lot of people said I should come and how good it was. At least 5 of my facebook friends said it was brilliant"

5.

Service delivery is planned and maintained

The process for planning, delivery and evaluation of services is extensive and takes into account all aspects of the business. Clear aims and objectives are in place for all aspects of delivery. Promotional materials give information on the mission and values of the organisation.

The Mission Statement of Calderdale and Kirkless Careers Ltd is:

'Helping people to realise their full career and learning potential'.

The Values are described as:

- . 'involving users in the design, delivery and governance of our service'
- .
- . 'working with other providers to deliver a better service to our users'
- . 'providing independent and impartial advice and advocating on behalf of our users'
- . 'treating staff and users with honesty, openness and respect'
- . 'valuing diversity, innovation and excellence'

The business planning process is cyclical beginning with a review of the organisational business plan followed by a performance management review which includes all managers. This leads to the creation of team delivery plans involving all staff and culminates in a business development plan, which is reviewed, and the cycle begins again. During interviews, staff were able to describe their involvement in the planning process. They described the range of methods of receiving information regarding the planning process. This included team meetings, emails, small group discussions and whole company conferences.

Leadership is given by an executive management group. During the Review, staff described the ways in which they felt 'looked after' and supported to get on with their individual role. Those interviewed believed that the executive had worked extremely hard to both minimize potential cuts to services and ensure information was available throughout the process of recent changes. In terms of resource management, although cuts to services had been made, for example, the closure of one centre for two mornings a week, such reductions in service had been minimised by consideration of all aspects of the business in terms of reducing where possible without impacting too greatly on delivery. Careful consideration had been given to which mornings to close based on numbers of clients through the centre on each day and the possible ways that staff could utilize the time now available. Other measures had been taken to manage resources as effectively as possible. For example, some information resources have not been printed this year and have instead been included only in the electronic catalogue.

'Sharepoint' had recently been introduced to offer a web-based information resource for all staff to ensure live and accurate information was available. Although some staff had reservations about the web-based resource, preferring the previous 'intranet', Sharepoint did offer staff wide ranging information on all aspects of the business including up to date

legislation, policies, procedures and virtually any document necessary to ensure they had the resources to carry out their role.

A range of team and functional meetings ensure that staff have a voice within the organisation. All staff interviewed believed that their opinion was valued. Examples were given of staff using their initiative to develop ideas with management support.

Calderdale and Kirklees Careers Ltd work very closely with a range of partners and network organisations. This was apparent first hand in a Training Project, a College and during partner interviews. Both formal and informal arrangements ensure that the planning and evaluation of partnership working is effective in continuously developing collaborative working. Partners considered Calderdale and Kirklees Careers to be an effective partner, in terms of resources, planning, evaluation and effective delivery to individuals.

6.

Staff competence and support they are given are sufficient to deliver the service

As in the initial Assessment, the induction process for employees at is extensive and specific to each individual member of staff. For all staff interviewed during the assessment, the induction had been a positive experience although a few staff members felt that they may have liked to get on with their role sooner, as there was so much information to take in during induction.

All staff interviewed are competent to deliver within the remit of their role. Levels of competence are maintained by review and evaluation of training needs through the staff appraisal system. Where necessary, relevant training is available through the extensive company training provision. Training is relevant, effective and available, and relates to professional and business development. During the Accreditation Review, staff described access to a wide range of training including IAG and LDSS levels 2, 3, and 4 as well as preparation for teaching in lifelong learning.

Staff interviewed were clear about the boundaries and limitations of their own role. They were also able to give examples of the ways in which they were supported to deliver as effectively as possible. One team described the regular caseload meetings held with their manager to go through each individual client, as particularly supportive when managing a difficult and diverse caseload. Examples were given of appropriate referrals either internally or externally for clients with complex needs. All staff received support and supervision appropriate to their role. Examples were given of how staff members could access support through both formal and informal channels. Formally, staff are observed delivering IAG interventions and feedback is given to support sharing good practice, as well as improving delivery where appropriate. Informally, staff were able to drop in on their managers if they had concerns and many of those interviewed felt able to approach a member of the executive if they needed to verbally discuss an issue.

As in the Initial Assessment, staff felt well supported by their managers, appreciated within their role and that they were carrying out work which could ultimately make a difference to an individual's life. All of those interviewed were fully aware of how their individual role contributed to that of their team and of the wider organisation.

Many of the staff interviewed commented on how valued they felt and how they enjoyed coming to work despite the current climate of change. There was a definite pride in working for Calderdale and Kirklees Careers.

7.

Feedback on the quality of the service is obtained

Feedback is considered an essential part of the development of services within the company. There is a mixture of formal and informal feedback gathered which is part of the planning and evaluation process. A year 11 survey is carried out with a sample group each year and covers all aspects of their experience of Calderdale and Kirklees. A staff survey offers detailed evaluation of the 'employee experience' and the report is broken down into graphs, charts and descriptions of the views of all staff. This is an extensive proactive exercise, which ultimately drives development of the organisation.

There was less evidence of structured feedback and evaluation of work with young people with LDD and their parents. Although feedback was gathered informally and this was shared amongst staff and managers, the Company may wish to consider more formal and structured feedback activities for this group in line with other areas of delivery.

There are feedback cards in centres and outreach premises for clients to comment on the service, and there is information on how to make a comment, compliment or complaint. Staff described the process for dealing with complaints as well as for passing on compliments to a named member of the executive. The Company Annual Review details numbers of feedback comments received as well as how they were resolved.

Adult customers are encouraged to give feedback after every intervention. These are then collated and shared with the external adult service contract holder.

When being asked for feedback clients staff and partners understood why it was being requested and that it could have an effect on the future delivery of the service. Feedback is published, either on the Workabout website or in centres, describing feedback received and action taken. Clients and partners were clear that their views were important to the organisation and were willing to offer feedback as requested.

As in the Initial Assessment, staff described the ways in which their feedback had been sought in order to further improve services. Consultation was considered to be an integral part of team meetings, informal discussions and whole company communication

All staff interviewed were fully aware of the complaints procedure and were able to describe the process by which issues were dealt with. A member of the executive would always be informed of any complaints received, whether they had been dealt with immediately or not. There were clear signs and posters available in each centre visited, which described how clients could make a comment, a complement or a complaint. Clients interviewed had been informed of how to do this, and felt comfortable to give feedback, whether it be positive or negative.

Clients were also able to give feedback via the website. This was made possible by an easily accessible feedback page. Results from feedback and action taken were also displayed on the website.

8.

Continuous quality improvement is ensured through monitoring, evaluation and action

Continuous quality improvement continues to be a key aspect of the whole operation of Calderdale and Kirklees Careers. Structured processes are in place to enable feedback and evaluation to inform and guide future planning. Examples of evaluation reports from within the organisation and from partner organisations demonstrated thorough consideration of delivery and the identification of areas for development.

Members of staff interviewed were aware of the importance of evaluation was to the future prosperity of the organisation. They were able to describe the ways in which they contributed to evaluation. These included: discussions at team meetings, functional task groups, appraisal interviews and staff surveys. The recent staff survey of July 2010 gave staff members the opportunity to comment on the organisation against a range of criteria. This in turn informs the business planning process. The survey covered both statistical and test based data, with many staff members offering suggestions for future improvements.

Evaluation of the service was also reflected in the range of plans and key guidance for every section of delivery. The differing functional area plans, all held aims and objectives based on previous evaluation of the work of the specific area of work. Staff were able to describe their role in evaluating previous work, and make suggestions through team meetings for improvements. Work with adults, training and work with young people were all areas for detailed evaluation of delivery, ensuring that feedback from staff, clients and partners supported continuous quality improvement of each of these services.

The latest evaluation of work with yr 11's for example, concluded that improvements could be made to areas such as increased 1:1 work, the exploration of individual aspirations, better marketing of the PA role in schools and informing schools and young people of the differences between Careers Guidance and Careers Education.

It was clear during the Accreditation Review that there had been difficult decisions made regarding levels of service and reductions in costs. Evaluation had informed such decisions and managers were able to demonstrate the process by which final choices had been made based on careful evaluation of impact, cost, priorities and future government thinking.

7. Conclusion

In the three years since the Initial Assessment of Calderdale and Kirklees Careers, there have been significant changes to the Guidance sector, and since the change in Government in 2010 reductions in public spending have meant that Careers Companies have had to consider their priorities, spending and future place within the sector.

Calderdale and Kirklees Careers have nurtured their positive reputation with key players, including their two Local Authorities and have built on years of effective work to position themselves as well as possible for any future changes. Redundancies have been made on a voluntary basis and some vacant posts have been frozen. Despite these demoralising issues, staff have remained upbeat and positive about their working environment. Morale was unexpectedly high across the staff group and many cited the way in which they felt 'looked after' and 'valued' by the company as the reason for this positivity.

The Company have continued to listen to clients, staff and partners in order to try to improve the services on offer throughout the intervening time between assessments and this has impacted on staff morale as well as the ability to demonstrate continuous quality improvement. Throughout the Accreditation Review, those interviewed demonstrated the Mission Statement in practice.

'Helping people to realise their full career and learning potential'.