



# Evaluation of SEEDA European Social Fund (ESF) Co-Financed (CF) Programme 2004-2007

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## Executive Summary

### The Evaluation Brief

Twenty-five projects received SEEDA ESF / Co-Financing under the ESF Programme 2004–2007 to identify and meet emerging skills shortages in the business sector and to promote adaptability and entrepreneurship in the workforce in the South East. All projects were designed to address some of the challenges highlighted by the SEEDA Regional Economic Survey (RES) 2006–2016. An evaluation was undertaken by each contracted organisation. This report brings together the results of these individual evaluation reports, the findings of a telephone interview with 328 participants undertaken independently by Spirit Research & Evaluation Ltd, and project manager feedback, to demonstrate:

- The impact of the projects on businesses and individuals
- Project sustainability and legacy
- The contribution made towards achieving the aims set out in the RES 2006–2016
- Lessons and recommendations that can be applied to future projects.

### Highlights of Achievement<sup>1</sup>

As a result of ESF in the South East new qualifications have been developed to support the growth of Social Enterprises; four Regional Resource Centres (RRC) have been established to help develop sectors key to the economic growth of the region; 150 business support mentors have been trained and have delivered support; and eight websites have been created.

#### Numbers of businesses and individuals benefiting from ESF activity

- 2098 businesses supported
- 1033 businesses received information, advice and guidance
- 3355 individuals supported
- 1084 individuals received information, advice and guidance

#### Qualification support

- 27 training modules developed
- 5 learning modules accredited

### Target Attainment

The efficiency of the re-profiling of projects has ensured that almost all projects have met or exceeded their key targets (defined as outputs and outcomes) and thus met SEEDA's aims for ESF during this period. A total of £10 million has been successfully accessed by projects to achieve a range of milestones and outputs during this time. The most challenging of targets have been firstly the development of qualifications (due to the longer than anticipated length of time needed to reach the "accreditation" stage), and secondly employer engagement (due to a number of issues including ease of identifying the target market, the marketing strategies adopted and a reliance on referrals from stakeholders and partners to the project).

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<sup>1</sup> Figures derived from Project Closure data and Project's own evaluation reporting

## Telephone Survey

The responses to the telephone questionnaire survey showed that project participants found the training and other activities to be relevant to their current employment and their specific occupational requirements, and thought the training was well organised with clearly identified objectives and well-defined outcomes. It was seen to have enhanced their performance in their current post and most felt better prepared for a future post or role. One in four participants were not aware that their training opportunity and/or activity had been funded by ESF.

## Impact

Significant reported impacts (see individual project sections and results of telephone survey) included:

- Acquisition of new skills, new ways of thinking, improved confidence
- More positive morale and improved employment prospects
- Increased commitment to the organisation and a stronger sense of purpose
- Improved productivity and/or performance
- Enhanced ability to develop new products and/or improve processes
- For the lean project and Regional Resource Centres in particular, increased ability to compete in global markets.

## Sustainability

The majority of projects have future sustainability; many will continue in some form. Evidence of project sustainability and legacy included:

- The availability of toolkits, web-based resources and new qualifications
- The ongoing provision of services at commercial rates
- Use of other external funds to sustain projects
- Transition to new projects, linkages to other initiatives, and influence upon other projects.

## Advice to Future Projects

Projects fed back what advice they would have appreciated at the start. Comments included:

- When marketing focus on business benefits, not the process.
- Spot where your project will help organisations to meet legislative requirements. Market this.
- Forge strong links to intermediaries. This is more effective in generating referrals than mailshots and events.
- Include details of your project on Train to Gain and Business Links databases.
- When working with partners consider output-related contracting with them.
- Partner only with those that you believe will really add value.
- Build in robust eligibility checks at the outset. Email guidance on eligibility and enrolment forms prior to events. Invest in a high quality Administration Manager.
- To get the most out of evaluation, map where participants are at the outset, then measure the distance travelled.
- Offer bite-sized training; it's hard for SMEs to release staff for whole days.
- Provide a clear and easy to navigate prospectus of courses/provision on offer.
- If developing qualifications be aware that this can take far longer than anticipated.
- If providing mentoring invest in getting the mentor/mentee match right.

## Overview of Findings with Future Strategic Implications

The results of the individual evaluations, the telephone survey and the project managers' feedback, all indicate good results and useful learning for future projects. This is illustrated in the individual project sections. The main findings can be grouped under general headings:

### Issues of equality and diversity

- There appears to be a case for the development of a South East Region Equality and Diversity Strategy, pulling together current and planned activities into one coherent strategy and plan for the region.
- The Equality of Access Action Plan (EAP) has proved a valuable process to projects, with them reporting good response to the needs of clients, and the development of changes and innovations. It would be useful to consider how to disseminate examples of good equality of access practice, to existing and new ESF projects, to inform future developments, and the consistency of the content and implementation of the EAP across projects.
- There was found to be a shortfall in target participation from black and minority communities for some projects, and this merits further investigation.

### Links and partnerships

- These are an important aspect of projects and, when well managed, contributed to their successful impact. For example, links with Sector Skills Councils (SSCs), as the employer-led organisation responsible for addressing skills gaps and shortages, and links to the Business Support Simplification Programme (BSSP) as recommended in the South East Regional Framework.
- There is good evidence of projects attempting to link with Train to Gain (T2G) brokerage, but some disappointment that those efforts resulted in little added value to their projects. To support the BSSP, it is recommended that projects clearly describe at the tendering stage how they will link to business support projects and T2G, and their expectations of T2G. These expectations need to be managed.
- Consideration should be given to linkage to wider initiatives that aim to support technology transfer such as Science Technology Engineering and Manufacturing (STEM) initiatives and the Information Advisory Service.
- Those supporting organisations should be able to extend their capacity to provide support to social enterprises and to acquire formal accreditation for this activity, such as the Vocationally Related Qualification in Social Enterprise Support, or the Social Impact Assessment Award as developed by ESF/CF-funded activity.
- Future projects need to be made aware of the importance of continual liaison with referral partners and the need to help them understand the services on offer and the benefits that they can bring to an organisation. Some of the most successful projects have had few, but very committed, partners. Clarity of the offer is key.
- Where Regional Resource Centres (RRC) are to continue there should be some joint branding along with a shared vision to bring the RRCs closer together, and to enable them to share ideas with regard to delivery, marketing and publicity.
- The culture shift needed to encourage greater technology transfer between SMEs and universities and RTOs will take significant resource and effort. Increased co-ordination of existing activity is recommended to ease access to funds for business.
- Many local authorities were eager to send representatives to events aimed at supporting social enterprise and diversity in the workplace. This could be valuable as they are key in establishing

more public sector procurement opportunities for the social enterprise and voluntary and community sectors in the South East.

### **Problems with duplication**

- There has been evidence of duplication and overlap taking place with some of the projects.
- There is some evidence of commercial tension between providers where they are delivering similar products. Service Level Agreements might ensure greater clarity in this area.

### **Marketing of projects**

- Identifying the target market (including segmenting the market) and ensuring clear eligibility of participants posed some problems for projects. This could be rectified in future initiatives by spending time in clarifying definitions of the sectors to be involved.
- There is a need for specialist brokers who have the credibility, knowledge and skills required to engage employers in narrowly defined sectors to ensure target achievement.
- Closing the gap between attendance at introductory events and enrolling in specific programmes needs attention as some projects experienced low enrolments following introductory events.

### **Impact recognition and measurement**

- The extent to which projects focus on measuring the difference they are making to the participants has improved during the 2004–2007 period, although there is still a tendency to focus on the outputs rather than the impact in evaluation. The most common reason given is that there has not been time to realise impact. SEEDA might counter this by linking funding to evidence of actual, or predicted impact.
- Earlier projects expected SEEDA to drive forward recommendations made by projects, or to play a key role in ensuring project sustainability. Later projects more frequently recognised that it is their responsibility. It would be advisable for SEEDA to continue to push this message, which is having the desired impact.

### **SEEDA evaluation training**

- Evaluation Impact training delivered to projects by Spirit Research & Evaluation Ltd and funded by SEEDA was found to be helpful in enabling projects to set up systems to allow them to consistently collect data to support impact throughout the project life. This approach has resulted in an improved quality of individual project evaluation activity.
- The training the ESF Team at SEEDA has developed to help providers understand State Aid has resulted in fewer difficulties in the interpretation of the requirements from 2006 onwards. It is recommended that training focused on calculating eligibility and required contributions continues to be offered to ESF projects.

### **Project websites**

- These were most successful when populated with current and accurate information about what was on offer, to whom, where and when – and where particular attention was paid to search optimisation and updating of information. An example of this is the Marine CoVE website. Future contracting for websites should include these aspects of good practice in their monitoring.

### **SEEDA support**

- Projects felt the SEEDA ESF Team **managed the projects well**, and enjoyed good and open relationships with SEEDA. Many felt this positively impacted on their target attainment.

# 1. Introduction and Background

## 1.1 Context

This report provides an evaluation of the projects that received European Social Funding (ESF)/ SEEDA Co-Financing (CF) from January 2004 to December 2007. The report follows an evaluation of ESF Round 1 and 2 SEEDA ESF/CF projects, published in June 2004, and an evaluation of Round 3 projects published in April 2007.

## 1.2 Purpose

The purpose of this Evaluation is to establish:

- Impact of the projects on businesses and individuals
- Project sustainability and legacy
- Contribution made towards achievement of SEEDA's aims
- Lessons and recommendations that can be applied to future projects.

## 1.3 European Social Fund

The European Social Fund is funding from the European Union designed to improve the skills of the workforce and to help people who are finding it difficult to find employment. SEEDA set out their priorities for ESF, based on the RES,<sup>2</sup> and invited providers to bid for project funding to deliver activities to help achieve their priorities as described in this key strategic document, housed in a series of "Specifications". Other co-financing organisations in the South East included the *Learning and Skills Council* and *Job Centre Plus*. ESF is awarded for time limited projects through an open and competitive tendering process. Once contracts were awarded, SEEDA worked with the providers to ensure targets were delivered.

## 1.4 Regional Economic Strategy 2006–2016

This underpinned the development of the Specifications for projects. The vision of the RES is to make the South East into a world-class region achieving sustainable prosperity by 2016. This vision is underpinned by:

1. Building on excellence for global competitiveness
2. Investing in potential to lift underperformance
3. Safeguarding quality of life as a competitive advantage.

The three key "Challenges" contained in the RES are:

### 1. The Global Challenge

That the South East must maintain its competitiveness in the face of intensifying international competition – for global HQs and research establishments as well as for labour intensive plants and offices. The emergence of new global economic powerhouses, such as China and India, has offered real opportunities to build on the existing concentrations of excellence in the South East by becoming more enterprising, innovative and skilled. Equally, such international competition leaves no room for complacency.

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<sup>2</sup> Round 3 project priorities were also based on Regional Development Plan objectives

## 2. Smart Growth

The RES recognises that higher levels of prosperity per head across the South East without increasing the region's ecological footprint can only be delivered through higher productivity and by bringing more of the resident population into economic activity, and states that this can be achieved by focusing on the principles of smart growth and raising levels of enterprise, productivity and economic activity throughout the region. It highlights the importance of investing in potential to lift the prospects of underperforming areas, communities and individuals.

## 3. Sustainable Prosperity

Long-term regional economic prosperity can only be secured through the principles of sustainable development. This means recognising that pursuing growth within environmental limits can create new opportunities for innovation and competitiveness.

The RES also contains a number of **transformational actions**. These are over-arching actions aimed at supporting a series of specific actions. ESF provides linkage to a number of transformational actions:

- Science and Innovation Campuses
- Raising Economic Activity Rates
- Skills Escalator
- Global Leadership in Environmental Technologies
- Education-Led Regeneration

## 1.5 Report Structure

The report is structured as follows:

- Executive Summary
- Introduction and Background
- Individual project summaries based on project clusters, sustainability, advice to projects and recommendations for SEEDA. The advice to projects is intended to also be used as a standalone resource for current and future projects.
- Summary of project sustainability, advice to project and recommendations for SEEDA
- SEEDA ESF Beneficiary Questionnaire Analysis Report
- Overall Conclusions

## 1.6 Evaluation Methods Used

The following methods were used in support of the evaluation:

### Evaluation training

One-to-one evaluation training sessions, for project managers, staff members and partners, resulting in an individual Evaluation Template for each project were provided by Spirit Research & Evaluation Ltd. Training was introduced in this way to address the variable quality of the evaluation reports submitted by Rounds 1 and 2 projects, and the need for projects to focus more strongly on the measurement of the impact of projects. The training resulted in:

- A consistent approach to evaluation by all projects
- A focus on measuring the impact of projects as well as outputs as part of the evaluation process
- A close link between evaluation and project objectives
- Systems being built-in at the outset to allow evaluation information to be gathered consistently throughout the project life, rather than solely at project conclusion.

SEEDA Contract Executives periodically re-visited the Evaluation Template at monitoring visits to ensure evaluation maintained a high priority and that the evaluation information was being gathered throughout the life of the project.

### **Desk research**

An analysis was completed of each individual project from tender through to delivery and evaluation of ESF/CF. Documentation used in support of this activity included:

- SEEDA ESF / Co-Financing Project Specifications
- Original project tenders
- One to one evaluation training notes
- Evaluation Templates
- Contract Payment Profiles detailing achievement of outputs, outcomes and milestones against targets, and project spend
- Individual project evaluation reports
- Other documents, reports, marketing and case study materials as provided by project team members.

### **Participant follow up**

Participant follow up telephone interviews were carried out by Spirit Research & Evaluation LTd with 328 of the participants who took part in funded activity, to elicit feedback with regard to the impact participation has had on them and, if appropriate, their employing organisation (full results are presented in Chapter 4).

### **Project team interviews**

Discussions took place with key project team members near to project conclusion in order to explore project journey, to discuss key themes arising from the evaluation report in more detail, to clarify or gather additional data, and to explore lessons learned and project impacts.

## **1.7 Policy Field Areas**

Each project was awarded funding under a Policy Field and Measure Level as follows:

- Policy Field 2 – Equal opportunities for all and promoting social inclusion (*2 Projects*)
- Measure 3: To combat discrimination in the labour market, in particular to combat race, disability and age discrimination and to improve employability of these groups.
- Policy Field 4 – Adaptability and entrepreneurship (14 Projects)
- Measure 2: Research and identify emerging skills shortages and follow up actions.
- Policy Field 4 – Adaptability and entrepreneurship (7 Projects)
- Measure 3: Encourage entrepreneurship of individuals and competitiveness of businesses, particularly SMEs.
- Policy Field 5 – Improving participation of women in the labour market (2 Projects)
- Measure 5: To research into issues related to gender discrimination in employment such as recruitment, pay, segregation and progression and follow up activities arising from the research.

## **1.8 Projects Funded**

The total spend profiled by SEEDA in support of projects was £9,920,259; this was allocated across the funded projects as described in Table 1.1.

**Table 1.1: SEEDA ESF / Co-Financed Projects**

<b>Delivery organisation</b>	<b>Project</b>	<b>Policy Field and Measure Level</b>	<b>Final Funding and End dates</b>
<b>Round 3 (Jan 04 start date)</b>			
Portsmouth City Council	Promotion of diversity in workforce	2.3	£409,300 Dec 06
Engineering Employers' Federation (EEF) (South)	Lean techniques for advanced manufacturers	4.2	£994,778 Dec 06
SCA Community Care	Leadership skills for Care Sector SMEs	4.2	£563,364 Dec 06
Tourism South East	E-learning use in the tourism sector	4.2	£343,980 Dec 06
Regional Action and Involvement South East (RAISE)	Training for Social Enterprise Entrepreneurs	4.3	£376,429 Dec 06
Finance South East (FSE)	Business to business mentoring	4.3	£997,966 Dec 06
South East Social Enterprise Partnership (SESEP)	Supporting growth in social enterprise sector	4.3	£489,992 Dec 06
Kingston University	Discrimination in the workforce	2.3	£99,100 Mar 05
Kingston University	Healthy Working Centres	4.3	£85,000 Dec 04
University of Greenwich	Gender and the labour market South East	5.2	£98,147 Sep 05
<b>Round 4</b>			
Business Link Kent	Regional Resource Centre Environmental Technology	4.2	£370,600 Mar 08
University of Surrey	Leadership and Innovation	4.2	£216,040 Mar 08
Social Enterprise London	Professional Development for Social Enterprise Advisors	4.2	£247,586 Dec 07
Business Link Solutions	GO Public	4.3	£81,956 Jul 05

Continued overleaf /

Table 1.1: SEEDA ESF / Co-Financing Supported Projects (Continued)

Delivery organisation	Project	Policy Field and Measure Level	Final Funding and End dates
<b>Round 5</b>			
CCLRC	Regional Resource Centre for Advanced Instrumentation	4.2	£440,500 Mar 08
Engineering Employers Federation South	Service Excellence	4.2	£255,580 Dec 07
Social Enterprise London	Social IMPact for Social Enterprises	4.2	£248,951 Mar 08
Technology Enterprise Kent (TEK)	VALUE	4.3	£310,200 Mar 08
<b>Round 6</b>			
Farnborough College of Technology	Regional Resource Centre Space/Aerospace	4.2	£450,517 Mar 08
Southampton City College	Regional Resource Centre Marine	4.2	£411,450 Mar 08
Experian	Web Tool	4.2	£98,828 Dec 07
PERA	Skills Blueprint	4.2	£99,408 Dec 07
Business Link Solutions	Release the Potential	5.2	£315,156 Mar 08
<b>Round 7</b>			
Business Link Solutions	Going for Growth	4.2	£219,995 Mar 08
Great Western Enterprise	Management Development through Action Learning	4.3	£240,756 Mar 08
<b>TOTAL</b>			<b>£9,920,259</b>

## 2. Individual Project Summaries, Sustainability, Advice and Recommendations for SEEDA

The following sections are divided into groups of projects, clustered by their focus of activity and the groups/sectors targeted. Round 3 projects started in 2004, and concluded in 2006. Remaining Rounds launched in subsequent years and concluded in 2007. Clusters are as follows:

<b>Delivery Organisation</b>	<b>Project</b>	<b>Round</b>
<b>Equal Opportunities for all and Promoting Social Inclusion</b>		
Portsmouth City Council	Promotion of Diversity in the workforce	3
Kingston University	Discrimination in the workforce research	3
University of Greenwich	Gender and the labour market South East research	3
Kingston University	Healthy Working Centres	3
Business Link Solutions	Release the Potential	6
<b>Leadership and Management Skills Development</b>		
Finance South East	Merlin Mentoring	3
SCA Community Care	Leadership skills for care sector SMEs	3
Tourism South East	E-learning use in the Tourism sector	3
University of Surrey	Leadership and Innovation	4
Great Western Enterprise	Management Development through Action Learning	7
<b>Social Enterprise Development and Support</b>		
RAISE	Training for Social Enterprise Entrepreneurs	3
South East Social Enterprise Partnership	Supporting growth in the social enterprise sector	3
Social Enterprise London	Professional Development for Social Enterprise Advisors	4
Business Link Solutions	Go Public	4
Social Enterprise London	Social IMPact for Social Enterprises	5
<b>Regional Resource Centres</b>		
Business Link Kent	Regional Resource Centre for Environmental Technology	4
CCLRC	Regional Resource Centre for Advanced Instrumentation	5
Farnborough College of Technology	Regional Resource Centre Space/Aerospace	6
Southampton City College	Regional Resource Centre Marine	6
<b>Business Growth and Development</b>		
Engineering Employers Foundation (EEF) South	Lean techniques for advanced manufacturers	3
EEF South (EEF)	Service Excellence	5
Technology Enterprise Kent	Value	5
PERA	Skills Blueprint	6
Business Link Solutions	Going for Growth	7
<b>Web tool development</b>		
Experian	Web tool	6

## 2.1 Equal Opportunities for All and Promoting Social Inclusion

### 2.1.1 Summary

Five projects were awarded funding to promote the growth of the social enterprise sector and/or to embed equal opportunities in the South East. Three were “action” projects, providing direct support to individuals, and two were “research” projects, providing knowledge to underpin social inclusion and equality of opportunity activity in the region. Funding for projects totalled £912,404.

The research project, **Gender and the Labour Market South East England**, found a disparity in pay scale between men and women at the top end of the earnings scale, greater than anywhere else in the UK. In response, SEEDA Co-Financed the **South East Women’s Mentoring Network** in 2006 to provide mentoring support to help remove the glass ceilings experienced by those women aspiring to higher level management positions. 100 women have now received mentoring with 70 reporting increased confidence levels and 40 improved work life balance. The **Healthy Working Centres** research examined the concept and practice of Healthy Working Centres from the perspective of employers, remote workers and micro-businesses. The work resulted in the establishment of a sub-regional piloting network, Guidelines on Healthy Working Centres practices for use by both SMEs and large companies and a financial feasibility study. The **Promotion of Diversity in the Workforce** project provided training and resources for employers to promote the value of recruiting staff from a wide background and to raise awareness of disability issues. Many targets were exceeded with 375 SMEs engaged and 518 employees taking part in diversity training. The research project **Discrimination in the Workforce** focused on discrimination experienced by older workers, black and minority ethnic communities and disabled people in terms of access to, and progression within, the labour market. The research arrived at a comprehensive three-year plan with recommendations for actions to tackle discrimination in the SE labour market.

Collectively these projects have made an important contribution to the achievement of the RES 2006–2016 Key Action to support Equality and Diversity, in particular:

- Better targeted support for women’s enterprise
- Increased awareness among employers regarding equalities and disability legislation and its implications for business operation
- Promotion of the business case to employers for using the talents of all sections of the community
- Removal of the discriminatory barriers to economic activity including enabling employers to comply with legislation
- Encouragement of inclusive recruitment and retention practices.

A brief summary of each project follows.

**Round 3: Gender and the labour market in South East England (Research Project)**

The research aim was to identify good practice as well as barriers to women's full contribution to the labour market in South East England. Specific research objectives were to:

- Examine how the labour market position of women in the South East compares with that of men in the region, and with that of women nationally
- Identify the policies and practices adopted by employers in the South East with respect to gender equality
- Identify barriers perceived by employers and women employees in the South East with respect to gender and employment

<p>Lead organisation: Greenwich University</p> <p>Final funding: £98,147</p>	<p><b>Outcomes</b></p> <p>A two-volume research report was produced.</p> <ul style="list-style-type: none"> <li>• Part 1 – Gender and the Labour Market in England highlighted the following: <ul style="list-style-type: none"> <li>○ Economic and sociological explanations for the prevalence of gender inequality in the labour market are highly complex</li> <li>○ The law's approach to equality focuses on formal, procedural fairness and equality of opportunity, rather than equality of results</li> <li>○ Equal pay and sex discrimination laws are complex, compounded by lack of legal aid (though it should be noted that the law is but one factor impacting on the labour market)</li> <li>○ With regard to the labour market position of women in the South East, key findings were: women's earnings are relatively high in the region; there is a disparity in relative pay between men and women at the top end of the earnings scale that is greater in the South East than anywhere else in UK; the South East has a lower percentage of women employees with no qualifications than the UK as a whole – that is, lower than all regions except London; and, the National Employers Skills Survey does not provide gender breakdown data, thus making analysis of training and skills data problematic</li> </ul> </li> <li>• Part 2 – Employers Policies and Practices included a postal survey (454 responses) and interviews with 40 workplaces with 50+ employees. These focused on identifying policies and practices employers adopted and barriers employers and women employees experience with respect to gender and employment. Key findings: <ul style="list-style-type: none"> <li>○ Difference between public and private sectors in the implementation of sex equality measures</li> <li>○ Difficulty SMEs have in implementing equality measures due to costs and lack of access to the level of expertise needed</li> </ul> </li> </ul>
	<p><b>Impact</b></p> <ul style="list-style-type: none"> <li>• Finding of the disparity in pay scale between men and women at the top end of the earnings scale, greater than anywhere else in GB</li> <li>• As a result SEEDA in 2006 Co-Financed an ESF funded project, "South East Women", led by Business Link Solutions</li> <li>• This initiative has focused on removing the glass ceilings experienced by women, helping them to secure higher level management positions</li> </ul>

**Round 3: Healthy Working Centres (HWCs) – Research into new forms of work organisation  
Programme Area 2.3.2.A**

The research focused on the concept and practice of HWCs – from the perspective of employers, individual remote workers and micro-businesses – and also sought to develop an understanding of the main characteristics of healthy remote working.

<p>Lead organisation: Kingston University</p> <p>Final funding: £85,000</p>	<p><b>Outcomes</b></p> <ul style="list-style-type: none"> <li>• Key themes arising: <ul style="list-style-type: none"> <li>○ 86% of SMEs did not support the concept of a HWC due to concerns about security, cost, data protection, client privacy and the quality of shared facilities</li> <li>○ Strong preference for employees to work from home</li> <li>○ Where there was support for the centre concept (14% of employers and 41% of one-person micro-businesses), this was subject to the concerns of security, cost, data protection, client privacy and quality of shared facilities</li> <li>○ Benefits included networking, social learning, the opportunity for cross-fertilisation of ideas and business opportunities, reduction of isolation.</li> </ul> </li> <li>• 6 sub-regional networks established based on local drivers and social and economic needs of the locality</li> <li>• 6 focus group / dissemination meetings held</li> <li>• A number of publications have been made</li> <li>• Presentations made in relation to the research: <ul style="list-style-type: none"> <li>○ “New Forms of Collaborative Workspaces” Conference in Rome (March 2005)</li> <li>○ SEEDA senior managers presentation (July 2005)</li> <li>○ Alternative Workplaces to the Henley Future Work Forum (September 2005)</li> <li>○ BIFM (British Institute of Facilities Managers) Conference (March 2006)</li> </ul> </li> </ul>
	<p><b>Impact</b></p> <ul style="list-style-type: none"> <li>• Network of 40 key knowledge partners, around the key components of remote working</li> <li>• SEEDA’s decision to implement their “Work Choice” pilot, to encourage flexible working internally and to establish themselves as an example of healthy working good practice</li> <li>• Clear linkage to many of the RES objectives, and significant work underway, driving forward the healthy working agenda in the SE by SEEDA including: <ul style="list-style-type: none"> <li>○ Promoting the development of flexible working in quality jobs, including in rural areas, and enabling employers to develop flexible working policies and ensure the regional policy supports flexible working to contribute towards achievement of the Smart Growth – Employment Target<sup>3</sup></li> <li>○ Recognising that ICT is key to the success of flexible working, though negative health impacts can also be felt through home or remote working and, as such, employers need to adopt appropriate support policies</li> <li>○ Enabling employers to develop and implement flexible working policies to change perceptions and culture to embrace new forms of working, a key action for the Cross-Cutting Theme of Equality and Diversity</li> </ul> </li> </ul>

<sup>3</sup> Improve productivity of the workforce and increase economic activity from 82% to 85% by bringing 110,000 net additional South East residents of the working age into the labour market by 2016, as a step towards bringing up to 250,000 residents into the labour market by 2026

**Round 6: South East Women’s Mentoring Network (SE-WOMEN)**

The South East Women’s Mentoring Network project supported women in the workforce in management and leadership roles who wished to become better represented in senior management roles and to progress in their careers, and thus help build women’s representation in the labour market. They aimed to address the need to engage those who are under-utilised in the labour market and to raise levels of productivity. The key methods to achieve this included developing a regional network of trained and qualified mentors and coaches (mentors were trained and their services then provided to the mentee at no cost). The project also identified barriers to female career progression within the South East labour market.

<p>Lead organisation: Business Link Solutions</p> <p>Final funding: £315,156</p>	<p><b>Outcomes</b></p> <ul style="list-style-type: none"> <li>• Training programme for mentees developed</li> <li>• Training programme for mentors developed</li> <li>• 63 mentors completed mentor training programme in full (7 hours face to face, 24 hours self-directed learning) – all ex-Chief Executive Officers, current Line Managers, Directors or successful entrepreneurs</li> <li>• 100 mentees recruited:             <ul style="list-style-type: none"> <li>○ 73 received an Individual Needs Assessment</li> <li>○ 65 an Individual Learning Plan</li> <li>○ 92 training to help them prepare for the mentoring relationship</li> <li>○ 73 1:1 face to face and telephone mentoring sessions</li> <li>○ 35 ongoing support – Continuing Development Review</li> </ul> </li> <li>• 117 individuals receiving ongoing support and/or mentoring</li> <li>• 43 mentors receiving ongoing support</li> <li>• Webpage developed to support the mentoring process – recruitment, matching mentee to mentor, relationship management</li> <li>• <i>Women Into Leadership Conference</i> held</li> </ul>
	<p><b>Impact</b></p> <ul style="list-style-type: none"> <li>• 70% mentees reported increased confidence levels</li> <li>• 40% mentees reported an improved work life balance</li> <li>• Social impact – 350 individuals positively affected by the programme</li> </ul>

**Case Studies**

Mentees

Hayley has benefited from a number of practical solutions generated during the mentoring process and this has helped her demonstrate evidence of her progress to her directors at work.

Maria feels the mentor has given her much more focus and confidence. All Maria’s immediate career goals have been achieved. Her initial expectations have been exceeded.

Nina feels more focused on her goals, now that she has been helped to look at her values and direction.

Mentor

Jeannie found the programme very beneficial for both her and her mentee. Both drew on their experiences and different perspectives, which provided a motivating and challenging environment that gave mutual benefit. The skills, knowledge and experiences of her mentee complemented hers well.

**Round 3: Diversity Means Business**

The Diversity Means Business project sought to promote diversity in the workforce by: providing on-site visits conducted by Diversity Advisors, conducting a diversity “health check”, developing a “Diversity in the Workplace” employers’ handbook, providing diversity training – a menu of 15 one-hour training modules focused on general diversity, disability awareness and race & faith, constructing a Diversity Means Business website, organising project events such as conferences, clinics and road shows, developing a series of training resources on diversity issues, and creating a diversity in the workplace toolkit, an audit self-assessment tool and an action plan template.

<p>Lead organisation: Portsmouth City Council</p> <p>Final funding: £400,000</p>	<p><b>Outcomes</b></p> <ul style="list-style-type: none"> <li>• 334 businesses supported</li> <li>• 300 businesses received information, advice and guidance</li> <li>• 518 employees trained, 300 of whom were eligible (against a target of 300)</li> <li>• 10 jobs created</li> <li>• 30 training events delivered throughout the South East</li> <li>• 6 regional dissemination events delivered</li> </ul>
	<p><b>Impact</b></p> <ul style="list-style-type: none"> <li>• 234 companies adopted a Diversity Action Plan</li> <li>• 95% of those participating felt the training met their needs</li> <li>• 81% reported that the training was “excellent” or “very good”</li> <li>• 26 daily hits on the website from Oct 2005 – March 2006 (estimate 4758 hits over 6 months)</li> <li>• Key aim of the project was to raise awareness of <i>Diversity</i>, and this has been achieved. However, there is some evidence that SMEs felt that attendance enabled them to “tick the diversity box”. Had further support been made available, embedded change would be more in evidence</li> <li>• Due to the extent of paperwork, Impact Questionnaires were not distributed as it was felt that this would negatively impact on the learning experience</li> </ul>

**Case Study**

The Diversity means Business project formed a partnership working link in 2006 with Care Centre of Vocational Excellence (CoVE), designing and delivering a training programme specifically aimed at care sector managers. The project delivered 5 half-day workshops focused on Diversity and the Law, and Diversity and Employment, both of these being aimed at management level and designed to enhance awareness of Diversity issues and to ensure better understanding of policies and processes relating to the employment of staff, and legislative compliance. The Care CoVE has gone on to produce articles for its quarterly newsletter raising awareness of issues raised during the training sessions, e.g. Age Legislation due to come into force October 2006. It has also identified that there is a very clear need for the care sector to continue to train all staff in Diversity, and is continuing to work with the Diversity means Business project to investigate the possibility of further training for the future. All participants felt that participation had given them the skills needed to implement effective diversity practices.

**Round 3: Research into discrimination in the workforce**

Research focused on discrimination against groups in terms of access to, and progression within, the labour market. The types and extent of labour market discrimination experienced by three target groups – black and minority ethnic communities, older workers and disabled people – was profiled, drilling down to examine less obvious forms of discrimination. The research culminated in a three-year plan with recommendations for actions to address discrimination in the South East labour market.

<p>Lead organisation: Kingston University</p> <p>Final funding: £99,100</p>	<p><b>Outcomes</b></p> <ul style="list-style-type: none"> <li>• 1 web-based communication platform created</li> <li>• 1 3-year action plan created</li> </ul> <p><b>Key themes arising from the research</b></p> <ul style="list-style-type: none"> <li>• Most discrimination goes unreported or undetected due to fear, ignorance or apathy</li> <li>• SMEs are fearful of employment legislation and suffer from a lack of understanding, such as what “reasonable adjustment” really means</li> <li>• There is no reward for good practice</li> </ul> <p><b>Barriers</b></p> <ul style="list-style-type: none"> <li>• These are mostly institutional – such as transport, education, training, benefits, insurance, and pensions – resulting in high levels of exclusion</li> <li>• The information or support offering practical advice is fragmented and incoherent</li> <li>• Difficulties with overseas qualifications and references</li> </ul> <p>To address issues the report recommends that SEEDA should:</p> <ul style="list-style-type: none"> <li>• Support business development to encourage and reward diversity</li> <li>• Map support available against need to address duplication and ensure more coherence</li> <li>• Target discrimination hot spots and pilot co-ordinated approaches</li> <li>• Encourage schemes that transfer experience and knowledge, such as through mentors</li> <li>• Facilitate training and understanding of diversity for institutions and service organisations</li> </ul> <p><b>Impact</b></p> <ul style="list-style-type: none"> <li>• This report has informed the development of the relevant elements of the RES and informed other ESF projects such as the Diversity Means Business Project</li> <li>• Steps to promote Equality and Diversity – including enabling employers to comply with legislation, encouraging inclusive recruitment and retention practices, supporting outreach work by diversity experts in the Third Sector, working with self-excluded groups to facilitate inclusion, and supporting social cohesion initiatives – have been highlighted</li> <li>• The research report was circulated at a SEEDA facilitated Diversity event in 2006 hosted for a range of organisations</li> <li>• A number of key organisations worked closely with the Kingston research team and good partnerships were formed. This at the time provided a useful platform upon which to launch recommendations made by the team to drive forward the action plan</li> </ul>
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## 2.1.2 Sustainability and Legacy

### **Some project activity will continue**

The **Discrimination in the Workplace** project provided consolidated intelligence on the types and extent of discrimination in the labour market, its causes and impact on individuals. The research arrived at a 3-year plan, which offered recommendations for actions to address discrimination in the labour market, along with clear themes with regard to discrimination and barriers to progress in this area.

The **Diversity Means Business** project exceeded many targets, and significantly raised disability awareness amongst SMEs in not only the South East but nationally as the resources produced were freely accessible on-line at [www.diversitymeansbusiness.org.uk](http://www.diversitymeansbusiness.org.uk). This included a *Diversity Handbook* which contained leaflets focused on a number of different areas of practice, a Self Assessment Checklist and an Action Plan to be completed following Self Assessment. A small number of courses continue to be delivered to employers by one of the project partners, *Disability Dynamics*, on a commercial basis one year post ESF funding, and feedback from employers attending has been good. Research commissioned post project to ascertain the viability of making the project sustainable found cost was a major barrier to participation and for this reason it has not been sustained as the funds for the project could not be found. One of the themes arising from this project and the *Discrimination in the Workplace* research has been the need for stronger leadership within the region on Equality and Diversity issues, and a need for an overarching regional Equality and Diversity Strategy.

The **Healthy Working Centres** research influenced SEEDA's decision to implement their "Work choice" pilot, to encourage flexible working internally and to establish themselves as an example of healthy working good practice.

The **Gender and the Labour Market in South East** research discovered that amongst the highest earners the gender pay gap was wider in the South East than any other region – 30% compared to 20% for Great Britain as a whole. Its legacy can be said to be the raised awareness of this key issue. The publication of the research prompted the development of the **SE-WOMEN** project to tackle this disparity. However, changes in the structure of the lead organisation for the **SE-WOMEN** project, and the redundancy of two staff members made it difficult for the project to continue, or produce a viable sustainability plan. However, lessons learnt and barriers to progression reported by mentees will continue to provide a useful resource for those tackling the issues experienced by women aspiring to higher management roles in the South East. The project was not found to have impacted on the gender pay gap; it was believed by the team members that the time to realise this aim has not been sufficient.

### **Training programmes**

The **Diversity Means Business** project provided a series of 15 1-hour training modules focused on general diversity, disability awareness and race & faith. The **SE-WOMEN** also developed training programmes to prepare both the mentee and mentor for their mentoring relationship. This training can now be drawn upon by those hoping to deliver similar projects to avoid duplication and to ensure a coherence of similar activity in the future in the South East.

### **Increased confidence**

Both action projects resulted in the significant majority of participants feeling more confident as a result of taking part. This is key in ensuring that changed attitudes, aspirations and/or practice are maintained once the momentum and enthusiasm generated by taking part has had time to bed in. The projects' legacy is reflected in the increased confidence in addressing diversity issues as expressed by mentors, mentees, disability advisors and employers taking part in the projects.

## 2.1.3 Advice to Future Projects

### Keep it local

- If the project is regional, have a presence in each locality in which you are delivering. It is difficult to reach target groups when based in one geographic location in the South East unless efforts are made to network with credible, high quality, local organisations to support brokerage to the provision offered, marketing and delivery activity.

### Marketing

- Focus on business benefits when encouraging employers to take part in activity focused on discrimination. This was found to be key to employer engagement.
- Try and establish where there are legislative requirements to taking part in activity. 70% of participants from the **Diversity Means Business** project were from the care sector, encouraged to participate due to Care Sector induction requirements. SMEs will rarely take up diversity training and advice unless there is a driving factor such as legislation.
- Links to intermediaries and “word of mouth” provide more focused – and better value – approaches than traditional mail out activity.

### Partner contributions

- Consider formal contracting with partners with targets and financial rewards. What might be agreed at the outset, despite completion of partner declaration forms, has often not been realised, particularly where partners’ roles are focused on employer engagement. Do not rely wholeheartedly on partners to engage participants when developing marketing plans; it is good practice to make a “plan B” at the start in case initial marketing results in a shortfall in the expected number of participants.

### Research

- Use researchers from target groups such as BME communities and disabled people to help conduct field work where possible. Consult them on issues as they arise during the research. This often helps gain a fuller and more comprehensive understanding of issues and adds to the credibility of the research.

### Manage expectations

- At the outset it is important to recognise that SEEDA is unlikely to be the sole organisation able to drive forward recommendations made in research reports or indeed those made by action projects. Plan at the outset what the purpose of the research is, who the target audience for the report is and how actions may be championed and driven forward, and by whom in the longer term.

### Environmental sustainability

- Use ICT as a means of communication and information sharing within partnerships, with stakeholders, and with participants. Test it first to make sure it is 100% effective: problems with email communication and websites quickly disengage participants from projects.
- Consider developing an Intranet for participants and partners, making available course materials and reports. This could stimulate and assist participants in sharing their experiences. It could also help gather information to support evaluation, in particular the measurement of project impact.

## 2.1.4 Recommendations for SEEDA

### **Equality and diversity**

- There would appear to be a case for the development of a South East region Equality and Diversity Strategy to pull together existing and planned activity into one coherent plan for the region. This would ensure a reduced risk of duplication of effort, greater sharing of good practice and ultimately increased contribution to the RES aim to achieve greater equality and diversity throughout the region.

### **Employer engagement**

- All projects engaging employers should be advised to adopt the principles of the Business Support Simplification Programme as recommended in the South East Regional Framework. All project details should be included on Skills South East and Business Link databases.

### **SEEDA training**

- The training SEEDA have provided to help providers understand State Aid has resulted in fewer difficulties in the interpretation of the requirements from 2006 on. It is recommended that this training continues to be offered to future ESF projects.

### **Partner activity**

- Projects are sometimes disappointed by the levels of commitment shown by their partners, particularly in the context of their enthusiasm to market activity to employers. SEEDA could discourage potential projects from taking the approach at Tendering that “the more high profile, influential partners the better” and to consider that in this case “less could be more” if those fewer partners really do commit to the project. Some of the most successful projects have had few partners.

### **Encourage local delivery**

- To support project sustainability, reach to participants, good value for money and equality of access, it appears that robust networking with credible, high profile and trusted organisations in each sub-region is necessary to support both brokerage to the project, and the marketing and delivery of project outputs where possible. Potential projects should be asked for evidence of how they will achieve this at the Tendering stage.

### **Manage expectations**

- Projects often expect SEEDA to drive forward recommendations made by projects, or to play a key role in ensuring project sustainability. Whilst there has been a noticeable difference between earlier ESF projects who clearly felt this to be SEEDA’s role, and later projects who more frequently recognise that it is their responsibility, it would be advisable for SEEDA to continue to push this message. Clearly it is having the desired impact.

## 2.2 Leadership and Management Skills Development

### 2.2.1 Summary

Five projects were awarded funding to support leadership and management skills development in the South East. All were “action” projects, providing direct support to individuals. Funding totalled £1,370,144.

70 mentors with experience of growing a business and working at Board level for a PLC were given mentor training by the **Merlin Mentoring** project. They in return provided pro bono face-to-face mentoring to 250 start-up companies in the high-tech, knowledge-based sector. The **Creative Leadership** project facilitated the development of leaders and leadership skills among disadvantaged groups in the care sector. 596 individuals took part, with an additional 103 downloading the Management Guides, which were made freely available on the web. E-learning provided the focus for the **Welcome e-learning** project. Those in the tourism, leisure and hospitality sectors in the South East received online and traditional classroom training to support attainment of the ILM Certificate. Participants improved their ICT skills, through the support of a Tourism Advisor, which enabled many to reach new customers and overcome barriers to learning. 428 businesses took part in the programme. Two further projects employed Action Learning Sets (ALS): **Leadership and Innovation in Advanced Engineering** to support business leaders and managers in the advanced engineering sector, who sought high growth, and **Management Development through Action Learning** which offered ALS to increase the level of management and leadership skills within SMEs in one of the South East Priority Sectors. The former resulted in 11 businesses taking part, the latter 76 businesses. Both offered business issue resolution, personal development and key manager ALS.

All projects, but in particular the Action Learning Sets and Welcome e-learning have impacted on the RES Global Competitiveness Strategy Action to increase the percentage of turnover attributable to new products and services from 12% to 20% as participants report more confidence in introducing new ideas to the business. This confidence is key if the aim to accelerate global competitiveness is to be achieved.

Merlin Mentoring has increased access for entrepreneurs to leadership and management skills in line with the RES Global Competitiveness Action to ensure entrepreneurs can access leadership and management skills in order that they are able to innovate and thus grow successful businesses. The Creative Leadership project has contributed to the RES Strategy for Enterprise by focusing on business support responsive to the different accessibility and cultural needs of diverse groups.

A brief summary of each project follows.

**Round 3: Building a regional mentoring community for Enterprise Hubs – Merlin Mentoring**

This project built a regional community of high calibre mentors to provide business-to-business mentoring for high-tech knowledge-based entrepreneurs and start-ups in the Enterprise Hub network. Mentors were given training comprising induction, peer group action learning, one-to-one coaching and structured reading. Each provided *pro bono* face-to-face mentoring support in return for mentor training. All had experience of growing a business and working at Board level for a PLC.

<p>Lead organisation: Finance South East</p> <p>Final funding: £997,966</p>	<p><b>Outcomes</b></p> <ul style="list-style-type: none"> <li>• 60 mentors recruited and inducted</li> <li>• 250 start-up companies receiving specialist business support</li> <li>• 20 pre-start entrepreneurs recruited and supported</li> <li>• 11 new business start-ups formed</li> <li>• 6 sub-regional mentor networks formed</li> <li>• 300 1:1 mentoring sessions</li> <li>• 5 individuals gained employment</li> <li>• Framework and code of practice to govern the relationship between mentor and entrepreneur / start-up developed</li> </ul> <p><b>Impact</b></p> <ul style="list-style-type: none"> <li>• Enterprise Hubs agreed to subscribe to Merlin on a commercial basis thus increasing capacity to drive up start-ups and business sustainability</li> <li>• 52 of the 60 mentors were retained to work as part of Merlin mentoring community</li> <li>• The region now has a stock of high calibre mentors</li> <li>• FSE has been commissioned by the National Council for Graduate Entrepreneurs to make use of the Merlin community in mentoring students and graduates being supported by its Flying Start scheme</li> <li>• FSE has been commissioned to provide Merlin mentoring to a partnership of universities in the South East, where businesses can apply for mentoring to help them develop their business</li> </ul>
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**Case Study**

Positive Health Alliance was set up in Jan 2005 and is now on the cusp of significant expansion on many fronts including their product, the premises and their staff. Over the next 12 months they plan to take on 12 people. Their product – an interactive, on-line service called Balanced Living™ – helps individuals identify their health risks and proactively reduce them through personal nutrition and physical activity plans. FSE provided a mentor at a critical stage of development when they would not have been able to afford the costs of the quality of support received. The mentor made a huge difference to their business, giving them the chance to reflect on the strategic direction and Jon and James' individual roles.

**Round 3: Creative Leadership Project**

This project facilitated the development of “leaders” and “leadership skills” amongst women, black or minority ethnic (BME) individuals, disabled owners or managers in SMEs within the care and voluntary and community sectors (VCS) by providing individually appropriate management and leadership skills and access to specialist learning resources and specific courses. The project team worked with managers to identify training needs, advising about appropriate courses, offering access to the project’s own specialist learning resources, providing opportunity for sharing learning and best practice, and supporting and advising through a telephone and email helpline service. A series of Management Guides was produced, freely downloadable on the Ladder4learning website.

Lead organisation:  
SCA Community Care Services

Final funding:  
£563,364

- Outcomes**
- 300 businesses supported
  - 300 businesses received information, advice and guidance
  - 550 individuals supported
  - 105 of these from a BME group
  - 62 defined themselves as a Disabled Person
  - 314 completed an Open Learning Management course
  - An additional 103 individuals from the VCS who were not included in the above figures downloaded guides

- Impact**
- The impact of the project was qualitatively evaluated from beneficiary commentaries.
- Increased confidence – as a manager, in developing relationships with colleagues, in performance
  - Career development and progression
  - Personal growth
  - Organisational restructuring
  - Improved administration and management in the VCS
  - Increased professionalism
  - More informed and involved Trustees

**Case Study**

A new manager within the voluntary sector helping deliver support to homeless people with a range of other issues affecting their lives found the coaching and mentoring support provided over an 8-month period invaluable. This support enabled her to prioritise and manage time more effectively, explore multi agency opportunities, examine business and funding development and improve project monitoring and evaluation activity. As a result she moved from a feeling of “failing” to one of movement and development. Her increased confidence in her ability and in the role resulted in her increasing user involvement, leading to trying new ideas and making proposals for change. She is now studying at Post Graduate Certificate level and has achieved her aim of making projects more stable and sustainable with 75% of her projects now achieving this aim.

**Round 3: Welcome to E-learning**

This project aimed to raise managerial and entrepreneurial skills in the tourism, leisure and hospitality sectors in the South East by piloting an e-learning programme consisting of remote access online delivery, traditional classroom style training, and a “blended approach” for delivery of an Institute of Leadership and Management (ILM) Certificate. The project encouraged businesses to use ICT to reach new customers and increase profit, through the support of a Tourism Advisor who visited and engaged with employers, and through the development of a programme for e-learning delivery, designed to overcome barriers to learning amongst small employers and their employees.

Lead organisation:  
Tourism South East (TSE)

Final funding:  
£ 343,980

Additional £3000 received for overachievement

**Outcomes**

- 436 businesses engaged (target 250), 41 businesses from deprived wards
- 649 individuals supported
- 600 individuals received information, advice and guidance
- 717 individuals attended one or more one-day courses
- 34 individuals gained the Level 3 ILM Certificate in First Line Management
- 5 individuals completed a Practical Trainer Certificate
- 156 workshops/one-day courses delivered (totalling 4318 learning hours)
- 1 website created

**Impact**

- 95% participants reported increased business and management skills
- 69% are making better use of the internet
- 56% have achieved lower marketing costs
- 64% have increased occupancy
- 56% have stated that their profitability has increased
- Smarter Marketing programme is now being adopted in other tourism areas
- 102 businesses accredited to “Partners in Success”

**Case Study**

The owner managers of the Old Store Guest House feel participation has raised awareness of their customer care and the need to meet legislative requirements. The Welcome Host training helped them reflect on the impression they give to guests and has enabled them to improve their customer service, stating *“It has helped us understand our customers’ needs a little better, and combined with the project as a whole we are now more aware of how we deal with people.”* *“All in all our business skills have improved and we are expecting profitability to increase.”*

**Round 4: Leadership and Innovation in Advanced Engineering SMEs**

The project aimed to recruit SMEs in Advanced Engineering who sought high growth and needed investment in their leadership and management potential to support the achievement of this. Business leaders and their managers took part in an action learning programme to develop their business leadership skills and to facilitate the identification and management of innovation in the business. The action learning environment aimed to broaden horizons through the exchange of ideas and experiences. The programme included Action Learning Sets (ALS) for Business Leaders, Managing Directors and linked senior/middle managers.

Lead organisation:  
Surrey University

Final funding:  
£216,040

**Outcomes**

Of the ALS delivered:

- 11 businesses supported
- 57 individuals supported
- 12 individuals took part in business issue resolution ALS
- 10 participated in the Managing Directors Development Programme
- 47 took part in the Key Managers programme (note that it was possible for individuals to take part in more than one ALS)

**Impact**

Participants report:

- Increased knowledge and skills to help move the company forward
- Benefits of networking with other companies and sharing experiences
- Listening to other managers which resulted in reflection and consideration of options with regard to managing their own business issues
- Improved self-awareness

**Case Study: Neil Pizzey – Manufacturing Director, Amazon Filters Ltd**

Neil has worked with Amazon Filters, specialists in liquid filtration equipment for process industries, for 14 years. He has seen the company grow to one which doubled its turnover in the past 4 years to £4m and one which now employs over 80 people. Innovation and growth are key to the continued development of the business. Neil took part in the Leading Innovation ALS programme in order to feel more confident in playing his part in growing the business, and in managing change. These objectives he feels were met. Since taking part Neil also feels better able to influence others and communicate more effectively. As a result of his positive experience Neil has recommended the ALS to other managers in the company.

**Round 7: Management Development through Action Learning (AL)**

This 12-month project aimed to increase the level of management and leadership skills within SMEs in regional priority sectors in the South East by providing an opportunity to take part in effective AL management development programmes. The Information, Diagnostic and Brokerage (IDB) model was applied in partnership with Business Links by providing choice to participants. Three action learning options were developed to suit manager and leader roles.

<p>Lead organisation: Great Western Enterprises: Business Link Berkshire Operating Division</p> <p>Final funding: £243,760</p>	<p><b>Outcomes</b></p> <ul style="list-style-type: none"> <li>• 15 ALS programmes delivered: 6 focused on business issue resolution, 6 on personal development and business issue resolution. 3 programmes were for deputies of those managers who worked on parallel issues</li> <li>• 71 businesses supported</li> <li>• 94 managers attended the AL programme and completed individual assessments</li> <li>• 64 managers from 43 businesses attended the Masterclass</li> <li>• One day Masterclass for ALS participants with key speakers / group work</li> </ul>
	<p><b>Impact</b></p> <p>Participants report:</p> <ul style="list-style-type: none"> <li>• Use of principles of Action Learning within their management team(s)</li> <li>• Improved insight into and understanding of decision making within the business</li> <li>• Better understanding of self, and how they may be perceived by others in the business</li> <li>• Use of Action Learning principles to clarify with Directors their thoughts and ideas on ways forward, and to gain buy in from them for these ideas</li> <li>• More frequent focusing of minds on key issues in the workplace</li> <li>• Significant benefit to their business; change in attitude has translated into real measurable results</li> </ul>

**Case Study: Robert May – ramsac limited**

Robert is the Managing Director of ramsac limited, an IT outsourcing business based in Surrey, working predominantly with the SME sector. He has reported an improved drive, a renewed vigour and clarity of objectives. Robert believes that all business owners on the programme have benefited from each other through advice, honest options (sometimes brutal), shared ideas, systems and procedures. *“It doesn’t matter what size your business is or what point in its growth cycle it is, as business people we all face the same challenges sooner or later.”* Ramsac have a very positive and exciting growth plan for the next few years and the lessons learnt and support of the Action Learning peer group Robert feels will be invaluable in this process. Such is the value to the group members of the Action Learning programme that the group have agreed to continue to meet every 4–6 weeks on an ongoing basis.

## 2.2.2 Sustainability and Legacy

### Good evidence of sustainability

The **Kent Community Alliance Network**, a county-level Community and Voluntary Sector infrastructure organisation, has been successful with a bid made to the National Lottery (Big Fund) for a leadership programme based on the Creative Leadership Project (CLP) model. **Learning Curve**, an organisation working in the South West has also taken up the CLP model and has won a tender from the local Learning and Skills Council for a CLP programme in Swindon and Gloucester. The project manager for the project has been approached by a consortium of organisations of disabled people who have also been successful with a Big Fund bid for a capacity building programme for 200 organisations of disabled people across England. The group are interested in the CLP and how this might be implemented is currently under discussion.

The **Welcome E-Learning** project also demonstrates good sustainability. Since project closure in 2006, Tourism South East (TSE), the Lead Partner, are still using a *Welcome Management online* Excellence Model Toolkit developed as part of the project. This was subsequently used in the LSC-funded **Welcome Sussex** project. This online toolkit helps businesses achieve the nationally accredited NCFE Welcome Management Qualification. The Welcome E-Learning project also enabled an online Toolkit to be developed to support businesses using the Partners in Success PLUS Business Support Pack, as well as updating the Basic version of Partners in Success Business Support Pack ensuring its currency. Both support packs are in continued use at TSE Advisor visits to tourism businesses.

**Merlin Mentoring** transitioned into the new Enterprise Hub network mentoring programme. It continues to grow and build momentum. Approximately 100 entrepreneurs and SMEs have received mentor support since **Merlin** ended and there has been a significant expansion in the number of high quality mentors in the region willing to work on a pro bono basis with 45 additional mentors now trained to deliver a mentoring service. The programme has also been extended to two other initiatives **CommercialISE** which links university knowledge with business expertise in the South East to deliver an integrated framework of funding and support, and **Funding Enterprising Women** which helps female entrepreneurs understand the various funding sources available to them to become investment-ready in order to maximise their chances of raising finance for their business.

### Action learning continuation

A number of participants on the Great Western Enterprise-led **Management Development through Action Learning** project have asked if they can continue with their ALS meetings as they see further benefits and it appears likely that they will continue using a self-facilitation model. One of these groups hopes to maintain the services of their facilitator. There is the possibility that Train to Gain and Leadership Development Advisor support and grants could be available to those that took part to support their continued learning.

The **Leadership and Innovation in Advanced Engineering** project will not continue. This project experienced shortfalls in target attainment. The lead organisation has commissioned research to help them understand why this was the case. Early indications are that reasons for the shortfall may include:

- Difficulty in identifying who SMEs in the “Advanced Engineering” sector were, compounded by no formal definition of the sector
- Lack of understanding by Advisors and SMEs of what Action Learning is, its benefits and which organisations were eligible to participate

- Possibility that there was an insufficient number of eligible businesses to target and/or that there was insufficient data about eligible businesses
- Unexpectedly low number of SME referrals from Business Link
- Confusion over the term “Leading Innovation”; it is thought some may have interpreted this as innovation being the product, not leadership skills development
- Initial reliance on a marketing strategy which comprised a mailshot to 1200 SMEs, which resulted in just 2 participants, and partner referrals which were not realised on the scale that was hoped for.

## 2.2.3 Advice to Future Projects

### Partnership working

- Partnership working can be either beneficial to a project, or pretty much a waste of time. Key partners such as Business Links, Skills South East and Skills 4 Business have really added value to some projects; in other cases projects have been very disappointed that partners did not supply them with the number of referrals they had hoped for. Efforts to forge strong relationships with influential partners will reap rewards, but these relationships do need to be robust if they are to have the desired impact. This will a) help build an understanding of the services on offer including eligibility requirements and b) increase confidence in those services and thus likelihood of referrals. As a minimum, linkage should be made to Train to Gain and the Business Support Simplification Programme (BSSP).

### Marketing

- Be careful using mailshots as most projects have found that these offer a poor rate of return. Networking, word of mouth and use of intermediaries have proven to be far more effective in generating employer interest in projects. In addition it is worth encouraging existing participants to recommend your project to other businesses. You could even consider incentivising such referrals in some way.

### E-learning

- If you are considering use of ICT to support learning make sure that you incorporate blended learning opportunities so that there is some human contact on the programme at front end and throughout the project journey. Expecting individuals to be sufficiently self-motivated to complete pure e-learning programmes can be a tall order for even the most motivated learner.

### Group activity configuration

- When facilitating groups, projects have found it useful to avoid mixing small with medium-sized employers; those from the same sector to minimize the risk of commercial conflict; and those who are working at very different levels of seniority in their organisation.

### Costs

- Keep the costs low wherever possible. This is particularly important for small and less financially well off organisations.

### Mentoring

- Mentoring relationships have been found to be a more powerful change agent than learning. Make sure that you focus significant attention on getting the matching of mentor to mentee right as this has been one of the most critical aspects in determining whether the mentoring relationship is a success or not.

### Measuring impact

- If you really want to demonstrate the difference your project has made, make sure you establish a baseline of participants at the outset in terms of knowledge base, confidence levels, what they wanted to achieve, what would be a good outcome for them, etc. – you could get the Steering Group to feed into this process. Then make sure you have robust evidence of distance travelled against these when they leave the activity and ideally again 6 or 12 months later. There are some good web tools available that will help you do this cheaply and effectively if the thought of the paper work and analysis of data required puts you off.

### **Define the offer very clearly**

- It is important to make sure that any organisation, particularly those brokering SMEs to your activity, and your target group themselves understand clearly what it is you have to offer. In all marketing literature make sure you describe all that you provide, and don't assume knowledge of terms such as "Action Learning Set" for example. Emphasise that it is about working with peers and is not a taught programme and use case studies to illustrate the benefits others have had.

### **Sub-contractors**

- Make sure you know them well and are confident of their quality of delivery and their ability to support project success before contracting with them. Fund sub-contractors on achievement of outputs where possible, rather than solely on activity; this will help share the risk of any shortfall in target attainment.

### **Project structure**

- Try not to build in unnecessary hurdles to participation, such as attendance at an event prior to registration. Others have found this extra time out of the office has put potential individuals off taking part in projects, and have mid-way through their project taken the decision to remove this requirement.

### **Administration**

- Where possible collect the information required at events to avoid delays in ESF deadlines and save you time in collecting the required information. Consider emailing or posting the relevant documentation a week or so before the event as some of the information required may not be instantly available to participants immediately on request. Remember, if there are gaps in information on the documentation required by SEEDA, or if ineligible participants take part, you may not be paid!

## 2.2.4 Recommendations

### Partnership working

- Some projects have been disappointed that their partners did not refer sufficient numbers of businesses to them. Others have been very pleased with the commitment shown but have worked hard to forge strong relationships. Future projects need to be made aware of the importance of continual liaison with referral partners and the need to help them really understand the services on offer and the benefits that they can bring to an organisation.

### Progression

- The **Management Development through Action Learning** project evidenced good practice in terms of progression support. They produced and disseminated an end of programme leaflet for participants, signposting them to next steps in their learning and any available funds or initiatives. Future projects should be encouraged to emulate this by producing their own materials and activity to support progression in line with the Skills Escalator model as defined in the RES.

### Sector Skills Council links

- Just two projects collaborated with Sector Skills Councils (SSC), through the Skills 4 Business network (the network of Sector Skills Councils), and/or with individual SSCs such as Skills Active and People 1<sup>st</sup>. All projects should be encouraged to link with SSCs as the employer-led organisation responsible for addressing skills gaps and shortages. Some SSCs have excellent links with employers regionally.

### Segmenting the market

- Some caution needs to be applied when determining a tightly industry-focused target group such as the Advanced Engineering sector. The project that focused solely on this sector found a number of difficulties with this approach, namely:
  - No hard definition of which businesses could be classified as Advanced Engineering and thus difficulty in marketing as uncertain which companies would meet eligibility requirements.
  - Difficulty for those brokering opportunities. For example, Leadership Development Advisors were reported to be very good at brokerage, but on occasion were found to be referring ineligible SMEs to the project.
  - Narrow target market = fewer eligible SMEs = risk of non-achievement of targets.

### Action Learning Set – understanding of

- There appeared to be some confusion as to what an Action Learning Set is amongst brokerage organisations. Projects need to be advised of this when planning any marketing activity or literature.

### Equality of Access Action Plan

- This has proved a valuable process, enabling good response to the needs of clients, and the development of changes and innovations in consultation with SEEDA. However, there is some uncertainty with regard to who is monitoring the content and implementation of these. It would be useful to clarify this.

### **ESF project networking**

- Two projects were delivering similar activity and were in effect in competition with each other. There was minimal collaboration between the two and perhaps this could have been encouraged as it would have added value. In addition, the **ALS Advanced Engineering** project was not aware of the ESF funded Advanced Manufacturing Regional Resource Centre. SEEDA could broker contacts between projects where there are similar activities and/or similar target groups.

### **Future activity**

- Future leadership and management activity should build on mainstream current programmes such as “Train to Gain” and the South East Leadership Academy to help avoid duplication of existing provision.

## 2.3 Social Enterprise Development and Support

### 2.3.1 Summary

Five projects were awarded funding to focus on supporting the growth of the social enterprise sector in the South East. Collective funding totalled £1,430,904. The individual project summaries which follow show how ESF / SEEDA Co-Financing has been used to initiate, help grow, sustain and ultimately realise a culture of social entrepreneurialism in the South East. The cumulative influence of these projects has benefited each stage of this process: activity has focused on generating interest in social entrepreneurialism; projects have also assisted and nurtured social enterprises during the early set up stages, and on through to output delivery; and finally, projects have supported activity to promote future sustainability. All projects achieved the majority of their stated targets.

The **Training programme for Community Social Entrepreneurs (Enterprise 4 U, E4U)** provided a tailored training programme for Community Social Entrepreneurs, helping individuals turn inspiration into enterprise. The **CDU Partnership**, through the work of three partners, delivered a programme of training, development opportunities, business support, workable solutions and awareness-raising events for those involved in Social Enterprise activity and those seeking to develop Social Enterprise in the region. The project **Professional Development for Social Enterprise Advisors (PD4SEA)** focused on developing a qualification and training programme for those organisations providing business support to social enterprises. **Social Impact for Local Economies (SIMPLE)** focused on the development of a portfolio of accredited qualifications and a training programme for those organisations wishing to evidence the impact of their social enterprise on the triple bottom line (i.e. social, environmental and economic). Finally, **Go Public** offered a co-ordinated portfolio of skills provision to help social enterprises in the South East maximise their business opportunities in the area of public sector procurement.

The collective result is that these projects have made an important contribution to the achievement of the RES 2006–2016 Smart Growth Strategy, which amongst other things aims to “...increase the participation of South East businesses (especially small businesses and social enterprises) in tendering for public sector contracts”. The skills learned have enhanced, and will continue to enhance, the Social Enterprise sector’s ability to procure public sector contracts. Future activity needs to build on this work by focusing on encouraging social enterprises to collaborate and develop partnerships of mutual benefit to increase their procurement potential, whilst also exploring opportunities to become second or third tier providers.

The RES also states the need to “...Stimulate increased levels of enterprise among under-represented groups”. While the impact of the projects will undoubtedly be to stimulate levels of enterprise, what is less clear is the extent to which this has taken place with under-represented groups. This lack of clarity has arisen as one target not adequately achieved collectively through these projects was that of encouraging participation by those from black, minority ethnic groups. Participation levels of these groups on social enterprise projects was clearly lower than anticipated.

A brief summary of each project follows.

**Round 3: Training programme for Community Social Entrepreneurs (Enterprise 4 U)****Aim and Approach**

This project provided a tailored training programme for Community Social Entrepreneurs, helping individuals turn inspiration into enterprise:

- Participants undertook a course and put together a portfolio of evidence for an NVQ Level 3 in Business Start-Up
- A network of Assessors were trained, and these trainee Assessors assessed candidates' work and worked towards Assessor Awards themselves
- RAISE established itself as a Training Centre recognised by the *Institute of Leadership and Management* (ILM) and trained Internal Verifiers to maintain quality standards and ensure consistency throughout the Assessor network

<p>Lead organisation: RAISE</p> <p>Final funding: £362,429</p>	<p><b>Outcomes</b></p> <ul style="list-style-type: none"> <li>• 87 individuals enrolled onto training, of whom 41 completed a business plan</li> <li>• 53 completed at least 30 hours towards NVQ Level 3 Business Start-Up</li> <li>• 25 received a Level 3 NVQ</li> <li>• 10 NVQ Assessors trained to assess NVQ Level 3 Business Start-Up</li> <li>• 3 trained to verify NVQ Level 3 Business Start-Up and 4 trained to deliver NVQ workshops</li> <li>• 10 Action Learning Set facilitators trained, and 17 Action Learning Sets held</li> <li>• 8 Introduction to Social Enterprise events were held</li> <li>• 30 workshops were held to introduce NVQ Level 3 Business Start-Up Units</li> <li>• 2 training modules developed</li> <li>• 1 Business Start-Up was established</li> <li>• 42 businesses received social enterprise business advice</li> </ul> <p><b>Impact</b></p> <ul style="list-style-type: none"> <li>• NVQ Centre of Excellence available for the voluntary and community sector</li> <li>• Improvement in business planning and thinking, knowledge and understanding of finance amongst participants</li> <li>• Increased levels of confidence amongst participants, assessors and verifiers</li> </ul>
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**Case Study: Linda Hazzard – Gaining Opportunities And Living Skills (GOALS)**

Linda Hazzard heard an E4U representative talk at an event about the courses on offer in November 2005 and was so impressed with the inspirational nature of this initiative that she signed up for the course. At this stage, she had hoped to set up a social enterprise providing motivational support for the unemployed. The E4U course she subsequently embarked on really made her think about, and shape her ideas, with regard to how she was going to achieve this aspiration. Linda set up GOALS (Gaining Opportunities And Living Skills) in 2007, which provides an empowering, highly interactive, and multimedia motivational course. Linda is working with disadvantaged groups of people (e.g. unemployed, lone parents, black and ethnic minorities, women into work), who through participation on the course work through "*The Ten Keys to Success*". Her clients include those delivering New Deal, Shaw Trust, Princes Trust, RLBI, Offenders Learning and Skills Services and the NHS. It is also used in the further and higher education sectors as a motivational course, for example, with trainee nurses. The organisation is now registered as a Community Interest Company (GOALS UK CIC) and is continuing to grow and thrive.

**Round 3: CDU Partnership****Aim and Approach**

This project, through the work of three partners, delivered a programme of training, development opportunities, business support, workable solutions and awareness-raising events for those involved in Social Enterprise activity and those seeking to develop Social Enterprise in the region:

- Individuals were given information, advice and guidance and the chance to develop their business skills and knowledge
- The project aimed to establish a series of networks or regional partners in the South East to further grow and maintain the social entrepreneur sector in the region

<p>Lead organisation: Un Ltd</p> <p>Final funding: £489,992</p> <p><i>Note: Project initiated by the South East Social Enterprise Partnership (SESEP)</i></p>	<p><b>Outcomes</b></p> <ul style="list-style-type: none"> <li>• 159 businesses supported</li> <li>• 118 businesses received information, advice and guidance</li> <li>• 135 individuals supported who also received information, advice and guidance</li> <li>• An additional 50 (ineligible) individuals supported from the public sector</li> <li>• 59 bursaries provided to potential social entrepreneurs</li> <li>• 19 organisations received business support</li> <li>• 50 Level 1 Awards achieved</li> <li>• 1 toolkit created</li> <li>• 2 training modules developed</li> </ul>
	<p><b>Impact</b></p> <ul style="list-style-type: none"> <li>• 50 participants progressed into Social Enterprise start-up</li> <li>• Raised profile of Social Enterprise in the region by engaging people through wider delivery on the ground, supporting the South East Social Enterprise Steering Group and engaging with county networks at regional and local level</li> <li>• Strengthening of the collective voice of the Social Enterprise sector</li> <li>• Initiation of an active social enterprise strategy group which continued beyond the lifetime of the project</li> <li>• Support to potential and actual social enterprises in geographic areas where this had not been available previously</li> <li>• Ways in which the project has impacted on the county networks on local training delivery will only become apparent in the longer term</li> </ul>

**Case Study: Patricia Buckland – Debt Talk**

Debt Talk was founded by Patricia Buckland in 2002 to provide training with regards to basic financial literacy to all ages. By April 2007, training had been delivered to 120 students in secondary schools (Year 11) via a pilot financial literacy course within the PHSE (Personal, Health and Social Education) curriculum. However, it was not until Autumn 2004 that the idea started to take off, when Patricia received support from the Lead Organisation, Un Ltd. She had no expectations about what they could offer, or of what the future could hold, ahead of their support. She found UnLtd's support "...way above my expectations... they made me aware of social enterprise and Companies House... this opened doors". Patricia believes that without the support of Un Ltd, "Debt Talk would not have got where it is". The service is very timely, with Debt Talk poised to take advantage of the introduction of financial literacy into the school curriculum in two years' time.

**Round 4: Professional Development for Social Enterprise Advisors (PD4SEA)****Aim and Approach**

Social Enterprise London worked with the 8 Social Enterprise Sub-Regional County Networks over a period of 2 years to:

- Provide personal and organisational development support to the third sector<sup>4</sup>
- Develop and pilot new Vocationally Related Qualifications (VRQs) based on the *Small Firms Enterprise Development Initiative* National Occupational Standards for Social Enterprise support
- Develop and deliver a professional development programme for Social Enterprise advisors in the South East based on the National Occupational standards

<p>Lead organisation: Social Enterprise London</p> <p>Final funding: £247,576</p>	<p><b>Outcomes</b></p> <ul style="list-style-type: none"> <li>• 3 new ILM accredited Level 5 VRQs</li> <li>• New qualifications for business advisors working with social enterprises, the first in UK based on new occupational standards. These are the only accredited qualifications recognised by the QCA for Social Enterprise Business Advisors</li> <li>• 62 Level 4 qualifications attained</li> <li>• 40 received qualifications in providing Social Enterprise advice</li> <li>• 40 organisations received organisational development planning support</li> </ul>
	<p><b>Impact</b></p> <ul style="list-style-type: none"> <li>• Greater availability and quality of Social Enterprise advice on offer in the region</li> <li>• 100% of participants felt the programme had a <i>positive</i> or <i>very positive</i> impact on themselves and their work</li> <li>• Many participants are now seen as <i>experts</i> in their field</li> <li>• A small number of participants have been promoted within their current organisation and are providing social enterprise advice</li> <li>• 79 emerging or actual social enterprises have been supported with many becoming more sustainable</li> <li>• Organisations have been able to generate new business opportunities</li> <li>• ILM has been encouraged by the project to add business support to its portfolio of awards and the new qualification is listed on the National Register of quality assured qualifications</li> <li>• A programme is being delivered to 30 individuals in the East Midlands, which will also serve as an opportunity to train future trainers</li> </ul>

**Case Study: Jane Barker – Oxfordshire Rural Community Council (ORCC)**

ORCC is a charity that aims to improve the lives of those living and working in rural Oxfordshire. Jane is a full-time Village Shops Development Worker, advising individuals wishing to set up and run community shops. Jane is more confident about providing advice to groups on legal structures; she has learned a great deal about the application of ICT. In addition to helping those setting up community shops, Jane has helped ORCC by setting up new monitoring and evaluation systems and by emphasising the importance of gathering client feedback. ORCC is now in a better position to achieve DEFRA quality standards. This, combined with Jane's new skills and qualification, has put ORCC in a stronger position to secure funding. Jane feels better able to respond quickly to the needs of clients as she has a better understanding of what these needs are and what needs to be done to help them.

<sup>4</sup> The "third sector" is the collective name given to organisations established for public benefit and not part of government or its agencies. Third sector organisations are non-profit driven, non-statutory, autonomous and the individuals who govern them do not get paid for doing so. The third sector includes community and voluntary organisations, mutuals, trades unions and co-operatives

<p><b>Round 4: Go Public</b></p> <p><b>Aim and Approach</b></p> <p>The project offered a co-ordinated portfolio of skills provision to help social enterprises in the South East maximise their business opportunities in the area of public sector procurement. This was achieved through the provision of:</p> <ul style="list-style-type: none"> <li>• Assistance in the form of an Organisational Training Needs Analysis or Individual Training Needs Analysis for those working in the sector</li> <li>• Training in procurement</li> <li>• Ongoing mentoring</li> </ul>	
<p>Lead organisation: Business Link Solutions</p> <p>Final funding: £81,956</p>	<p><b>Outcomes</b></p> <ul style="list-style-type: none"> <li>• 32 businesses supported</li> <li>• 35 Individual Needs Assessments completed</li> <li>• 26 individuals have attended training workshops</li> <li>• 12 individuals were mentored or otherwise supported</li> <li>• A “Meet the Buyer” event was held</li> <li>• 4 information events were held</li> <li>• Two 2-day training workshops were held</li> <li>• One 1-day training workshop was held</li> <li>• 1 training module created</li> <li>• 1 Benchmarking and impact assessment report produced</li> </ul>
	<p><b>Impact</b></p> <ul style="list-style-type: none"> <li>• Increased confidence amongst target sector to tender for contracts</li> <li>• Increased ability to tender for contracts amongst Social Enterprises and voluntary and community organisations in the South East</li> </ul>
<p><b>Case Studies</b></p> <p><u>Surrey Community Action</u></p> <p><i>“We won the tender! We have been successful in securing four of the six BME Mental Health Community Development Worker posts from Surrey PCT. We met with the PCT yesterday and they fed back that they were impressed by the quality of the written bid... So a big thank you for the advice you gave me during our meeting... it was invaluable. I am now working on another tender – business development is an increasing focus of my role –, so I look forward to keeping in touch with you and Larch Consulting.” Value of Tender £650,000.</i></p> <p><u>Milton Keynes Play Association</u></p> <p><i>“Thought you might like to know we have just been awarded the tender from Milton Keynes Council. On the framework we are in pole position for everything we tendered for... Thank you for all your help. It was good to use our mentoring to good effect.”</i></p> <p>Both citations are taken from emails to Larch Consultancy who provided the mentoring service.</p>	

<b>Round 5: SIMPLE (Social IMPact for Local Economies)</b>	
<b>Aim and Approach</b>	
SIMPLE developed a bespoke impact assessment toolkit (SIMPLE) which helped managers of socially motivated businesses to measure their positive contributions to society and their added value, and thus have the competitive edge when tendering for contracts. An accredited training programme was developed to help social enterprise managers understand and apply the toolkit.	
<p>Lead organisation: Social Enterprise London (SEL)</p> <p>Final funding: £248,951</p>	<p><b>Outcomes</b></p> <ul style="list-style-type: none"> <li>• 40 businesses and individuals supported</li> <li>• Report of tools used to measure social impact and social accounting</li> <li>• Development of the SIMPLE evaluation framework</li> <li>• Development of a new ILM Level 5 Social Impact Assessment Award</li> <li>• Social Enterprise Impact Assessment Trainer (SEIAT) – a 3-day training programme to support social enterprises in the use of SIMPLE</li> <li>• Skills gap assessment for 40 organisations</li> <li>• A virtual network of social enterprises established to promote social impact assessment</li> <li>• 32 NVQ Level 4 qualifications attained</li> </ul>
	<p><b>Impact</b></p> <ul style="list-style-type: none"> <li>• Validity of evaluating social impact promoted</li> <li>• SIMPLE framework being used to gather information about outcomes, to measure effectiveness and to develop new business planning processes</li> <li>• Understanding the importance of measuring and reporting on social impact has increased</li> <li>• Framework has resulted in participants developing enhanced business planning, funding applications and developing their organisation to ensure clients' needs are met</li> <li>• Vocational Related Qualifications (VRQ) attainment required the production of a case study outlining how individuals intended to use social impact assessment; this provided the basis of an ongoing organisational social impact assessment strategy</li> <li>• Social Enterprises more able to procure public sector contracts as they are now able to translate soft outcomes into quantifiable data</li> </ul>
<b>Case Study: 2AMASE – A social enterprise and workers co-operative</b>	
<p>The mission of 2AMASE is to ensure that Social Enterprise is seen as a viable way to make a positive impact on society. To this end, 2AMASE has developed consultancy services, training programmes, research services and business tools. Their conclusion with regard to the potential of the data collection procedures and impact assessment:</p> <p><i>“We will be able to begin a process that could result in a regular, perhaps annual, Social Impact Report. This report can be used to demonstrate social impact to our stakeholders, which will include current as well as future clients. It can also be used to inform and shape the strategic direction of our services and the organisation. We will be able to use it as part of our marketing and PR strategy, which will not only offer evidence about 2AMASE and its services, but may contribute to a wider evidence base for the sector, demonstrating social impact achieved within social enterprises, because it will also be reflecting the social impact of other (client) organisations.”</i></p>	

## 2.3.2 Sustainability and Legacy

### **Most projects will continue**

With the exception of **Go Public**, all projects have continued activity in some form. Even as regards **Go Public**, the contracted consultants that supported individuals on behalf of the project will continue to do so on a commercial basis.

### **Increased awareness of possibilities**

All projects have directly and/or indirectly raised awareness of social enterprise possibilities in groups and sectors where hitherto these possibilities may not have been considered. Existing and new opportunities will continue to evolve beyond the lifetime of the projects due to the momentum that has now been established.

### **Qualifications and training programmes**

An evidence-based SIMPLE evaluation framework and Level 5 Social Impact Award will continue to be available to aid social enterprises in objectively measuring their impact, and thus strengthen future bid applications. Furthermore, there are plans to develop a customised version of the SIMPLE training for funders and commissioners during 2008. This will be key in ensuring that commissioners look to social enterprises to fulfil their organisational aims; for example, those generated by the New Local Authority National Indicators.

The **PD4SEA** project will continue to have a lasting legacy through a planned expansion of the VRQ accredited awards, and increases in the number of social enterprise advisors in the region with accredited award(s) offering support. This will result in increased availability of higher quality, informed and targeted advice for the Social Enterprise sector, which in turn will impact on the sector's own sustainability and growth throughout the South East.

### **Increased confidence**

Key to many projects has been their development of knowledge, understanding and skills within the social enterprise sector, all of which develop confidence and competence. These are essential for business growth and sustainability and to help others grow and develop. The projects' legacy is reflected in the increased confidence expressed by many of those taking part, including both advisors and new and existing social enterprises.

## 2.3.3 Advice to Future Projects

### Qualifications attainment

- Make sure incentives are available to maintain course participants' motivation where qualifications are undertaken over a long period of time, particularly if spanning the summer months. There is a higher risk of drop out during this period.
- Ensure course participants know what to expect in terms of study time and the level of commitment needed to complete qualifications.

### Marketing

- Market the project activity in terms of the benefits to the sponsoring organisation. In the case of the **PD4SEA** project, it was the offer of the organisational assessment that provided the hook to encourage organisations to nominate a staff member to take part in the training.
- Mailshots do not provide a good return on investment. The use of networks and "word of mouth" provide more focused and better value approaches to marketing activities.
- The number of referrals from stakeholders can be disappointing. It is essential not to rely solely on these when designing your marketing plans.

### Partnership working

- Good communication is essential. Maintain constant phone and email contact with partners to aid understanding and to help engender robust partnership working relationships – this is particularly useful where there may be cultural differences.

### Events

- Consider ease of commuting to events as well as proximity to large populations. The former has been found to be more relevant in ensuring good attendance. However, if events are run locally, they better support people's desire to network with local organisations.
- Build in a long lead time for recruitment to activities to ensure sufficient time to plan and disseminate dates, times and venues.
- Negotiate a percentage of costs paid to delivery agents for running events and a percentage for numbers attending – this will share the risk between funder, provider and sub-contracted organisation. One event cost a project £7000 but only attracted three delegates. This left the project with a substantial deficit.
- You may find that you are in competition with others for event participants so where possible try to co-ordinate events to avoid this kind of duplication and the risk of initiative overload.
- Environmental sustainability
- Use ICT as a means of communication and information sharing within partnerships, with stakeholders and with participants.
- Consider developing an Intranet for participants and partners, making available course materials and reports. This could stimulate and assist participants in sharing their experiences. It could also help gather information to support the measurement of impact.

### **Evaluation**

- Introduce evaluation from the start. Information on a project, and feedback from an event, is more likely to be accurate and of a higher quality if gathered from the outset than if left until the end of a project.
- Use ICT to gather evaluation feedback where possible. Survey Monkey has proved a useful tool for this purpose.

### **Activity**

- Where possible offer training in bite-sized chunks. Many organisations will not commit to a two-day training event.
- Sequential activity, whereby each beneficiary needs to take part in a workshop before mentoring or other such activity can commence, affects target achievement in a negative way. This approach should be avoided, and a more flexible approach to providing support considered.

### **Social Enterprise procurement activity**

- Submitting a Pre-qualification Questionnaire (PQQ) is not always possible as size can render a social enterprise ineligible (i.e. turnover frequently must not be more than 25% of the value of the funds for which an application is being made). Alternative solutions may include working with a consortium to deliver services, becoming second or third tier providers, working with those that need the services delivered – not just the commissioners – and seeking advice on becoming a preferred supplier.
- Consider what it is that makes you unique and how this differs from the public sector... then market this!

## 2.3.4 Recommendations for SEEDA

### **Local Authority (LA) engagement**

- Many LAs were eager to send representatives to events aimed at supporting Social Enterprise. As LAs are key in establishing more public sector procurement opportunities for the social enterprise and voluntary and community sectors in the South East, it is recommended that if SEEDA seeks to promote similar activities in the future, then an exploration of how local authorities can benefit should be undertaken. This could include joint planning or delivery of an activity that would bring good value added, while also helping to minimise the risk of duplication. Social Enterprise Support Networks should be included in this activity.

### **Alternative approaches to procuring contracts**

- Research commissioned shows that achieving the RES aim of increasing procurement of public sector work by the Social Enterprise and Voluntary and Community Sectors could be supported by stakeholders, such as SEEDA, providing:
  - Help in building consortium approaches to bidding for contracts
  - Skills development to help organisations become second or third tier providers
  - Advice on achieving preferred supplier status
  - Support to establish working partnerships with those specifying the required services (this is not always the procurement department)
  - Guidance on how to sell the uniqueness of an organisation's service, highlighting how it differs from the public sector
  - Advice on working with public sector organisations on solutions to issues

### **Eligibility**

- Only one person from each organisation was permitted to take part in ESF-funded activity. To achieve lasting sustainability and impact it is recommended, if permissible, that two people should be eligible. This will help participants cascade and implement their learning within their own organisation, building greater capacity and impact positively on recruitment.

### **Meeting the needs of under-represented groups**

- There was a shortfall in target participation from black and minority communities for several projects. More investigation would be needed before concluding whether this was due to unrealistic targets being set or whether there needs to be more intense and engaging targeting of this group in the future if robust contributions are going to be made to this RES action. This is of particular relevance in the context of the high targets set for participation from disadvantaged groups in the ESF 2007–2010 Framework.

### **Support organisations**

- Those supporting organisations should be able to extend their capacity to provide support to social enterprises and to acquire formal accreditation for this activity, such as the VRQ in Social Enterprise Support, or the Social Impact Assessment Award.

**Need for wider understanding of social impact**

- Social enterprises can demonstrate their impact through tools such as SIMPLE, but unless SEEDA and other stakeholders understand the framework, and importantly are aware of how to interpret the resulting information, the value and practical utility of these tools will be limited. A strategy should be agreed to ensure commissioners, funders and key stakeholders understand the framework and its application.

**Duplication**

- Those delivering services must be informed of any similar activity taking place in the region to avoid duplication and target group confusion as there has been evidence of this happening with some of the projects targeting social enterprise.

## 2.4 Regional Resource Centres

### 2.4.1 Summary

SEEDA and industry stakeholders identified the need for, and subsequently spearheaded the development of five Regional Resource Centres (RRCs) across the South East. These aimed to address skill supply issues of priority sectors needing Science, Technology, Engineering and Mathematics (STEM) skills and to offer employers industry-led provision unavailable elsewhere. RRCs work with training providers to offer training solutions relevant to the sector. Four of these five have been supported by ESF with funding totalling £1,824,367.

The **RRC for Environmental Technologies** focused on addressing the gap between demand for sustainable technologies and the skills needed to apply these new technologies. 8 accredited modules tailored to the needs of businesses were developed, 200 participants were supported and 50 SMEs engaged. The **Advanced Technology RRC** addressed the shortage of skilled technologists in the Advanced Technologies sector by mapping market failure and then offering training opportunities via technical work-based courses to address those failures. Two new training modules were developed, 25 businesses took part and 88 participants received training spanning Levels 3–5. The **RRC Aerospace and Space** also aimed to enhance the skills base of the sector. This was achieved through extensive mapping of employer need and the co-ordination and delivery of a range of flexible advanced skills training and professional development opportunities to meet those needs. 40 courses were delivered to 275 participants and 50 SMEs engaged. The **Marine RRC** provided a dedicated access point for marine-based industries to access generic technical training and marine sector-specific training solutions. 73 companies took part, 23 courses were offered and 123 learning opportunities delivered.

RRCs have made a significant contribution to many of the RES Actions as follows:

- Global Competitiveness Objective Action 2 to increase business expenditure on research and development and greater collaboration with the region's knowledge base – a strong emphasis on the need for STEM skills and to train more advanced technicians. Clearly the RRCs have contributed to this by training more technicians and by promoting progression.
- Action 6, under the Smart Growth Objective, to ensure people are equipped to progress in the labour market, with a number of actions under this heading being successfully achieved by the RRC; for example, simplifying the offer to businesses, stimulating demand for higher level skills and increasing skills attainment.
- Action 10 – to engage the education sector in providing courses for sectors with skills gaps. There is strong evidence that the RRCs have made a strong contribution to this action with all working in close collaboration with both the FE and HE sectors to develop and deliver employer-led courses.
- The Transformational Action “Skills Escalator” which seeks to promote business improvement through training. The RRCs have noticeably made a strong contribution to this as shown by employee feedback.

RRCs have successfully addressed market failure through close analysis of the needs of employers in their sectors, and then designing flexible, tailored courses to meet those needs. The expertise of those managing the RRCs, their commitment to ensuring they understand what employers want and their prime location in key areas of sector activity have contributed to their success.

A brief summary of the four RRCs follows.

<p><b>Round 4: RRC for Environmental Technology Skills (RRCETS)</b></p> <p><b>Aim and Approach</b></p> <p>RRCETS sought to address the gap between demand for sustainable technologies and the skills needed to apply these new technologies by:</p> <ul style="list-style-type: none"> <li>• Establishing a network of “best in class” skills providers in the construction and manufacturing sectors</li> <li>• Adapting a range of courses to meet the needs of business in those sectors</li> <li>• Integrating provision into the Business Support Simplification Programme (BSSP)</li> </ul> <p>This RRC was unique in that courses were charged at full commercial rates.</p>	
<p>Lead organisation: Business Support Kent CIC (formerly Business Link Kent)</p> <p>Final funding: £373,900</p>	<p><b>Outcomes</b></p> <ul style="list-style-type: none"> <li>• 8 NVQ accredited modules developed                             <ul style="list-style-type: none"> <li>○ 11 at L3–4</li> <li>○ 6 at L4–5</li> </ul> </li> <li>• 156 individuals participated (note 410 took part, only 156 were eligible)                             <ul style="list-style-type: none"> <li>○ 128 at L3–4</li> <li>○ 40 at L4–5</li> </ul> </li> <li>• 115 SMEs engaged, 6 intensively supported</li> <li>• 7 Training Providers engaged in the delivery of training from higher and further education and private sector</li> <li>• Course duration between 1 and 5 days</li> <li>• Website developed <a href="http://www.rrcets.co.uk">www.rrcets.co.uk</a></li> </ul>
	<p><b>Impact</b> (Taken from participant feedback)</p> <ul style="list-style-type: none"> <li>• SMEs able to understand new legislation and opportunities that may present themselves as a result</li> <li>• Improvement in service delivery due to knowledge acquired regarding the 6* Sustainable Homes Standard</li> <li>• Ability to use Certification as evidence towards the CPD requirements of the industry</li> <li>• Improvement in briefings to sub-contractors</li> <li>• Networking resulting in potential for new productive relationships</li> <li>• Predicted business cost savings when demand for sustainable technologies increases</li> </ul>
<p><b>Quotes from participants</b></p> <p><i>“By taking part in this excellent course my firm has been able to bring all the new legislation up to scratch concerning sorting and storage of waste products. It was very worthwhile.”</i></p> <p><i>“I found the course useful in helping update old information.”</i></p> <p><i>“It was an excellent study day and has made a lot of difference to my work.”</i></p> <p><i>“Made me think how out of date we were.”</i></p> <p><i>“We now know exactly how important sorting waste is – it has saved a lot of money.”</i></p> <p><i>“I have been able to update the new legislation concerning waste management in my firm.”</i></p> <p><i>“Good and interesting course – we are getting our act together now.”</i></p>	

<p><b>Round 5: RRC for Advanced Technology</b></p> <p><b>Aim and Approach</b></p> <p>The Science and Technologies Facilities Council (STFC), previously known as Council for the Central Laboratory of the Research Councils (CCLRC), led the project. The Centre focused on:</p> <ul style="list-style-type: none"> <li>• Addressing the shortage of skilled technologists in the Advanced Technologies Sector</li> <li>• Mapping market failure and offering training opportunities via technical work-based short courses</li> <li>• Business networking to support sustainability and the sharing of good practice</li> <li>• Promoting Skills Pathways</li> <li>• Providing individual learning plans to support progression</li> </ul> <p>This RRC is based at the STFC Rutherford Appleton Laboratories site in Oxford.</p>	
<p>Lead organisation: STFC</p> <p>Final funding: £500,000</p>	<p><b>Outcomes</b></p> <ul style="list-style-type: none"> <li>• 2 new specialised training modules developed based on employer demand</li> <li>• 36 businesses participated and 30 businesses took part in a network</li> <li>• 115 businesses and 163 individuals supported</li> <li>• 105 Learning Plans produced</li> <li>• 30 NVQ Level 3 units attained</li> <li>• 8 training modules developed</li> <li>• 1 website produced</li> <li>• 1 mapping report which identified a need for: short courses to plug gaps, particularly software; a signposting facility; liaison with the supply side to achieve more consolidated but targeted provision training and resource to update FE and HE staff; and finally the need for training providers to recognise the benefit of investment in new course development</li> </ul>
	<p><b>Impact</b></p> <ul style="list-style-type: none"> <li>• Skills development across a number of disciplines</li> <li>• Development of new courses in metrology, CAD and electronics</li> <li>• Greater understanding of employer needs and route to successful employer engagement</li> <li>• The MKOB-based Centre of Vocational Excellence in Engineering is now able to expand its geographical coverage beyond Milton Keynes to the whole of the South East</li> <li>• SMEs given access to Rutherford Appleton Laboratories expertise/facilities</li> <li>• Training delivered to local FE college tutors in metrology to build FE capacity to deliver science subjects</li> </ul>
<p><b>Quotes from participants</b></p> <p><i>“The course is obviously good because the company is booking another course as it has proved so successful.”</i></p> <p><i>“The company are impressed with the feedback from us so far and as a group we are enjoying the course which leads to an NVQ. It is the first thing I have done since leaving school so I am well chuffed.”</i></p> <p><i>“I thought I was too old to learn new tricks, but I am enjoying a good well taught course.”</i></p> <p><i>“I am getting a lot out of the course, the written work we do in our lunch break and it is all working out well at the moment. I am glad the firm is doing it for us.”</i></p>	

<p><b>Round 6: RRC Aerospace/Space</b></p> <p><b>Aim and Approach</b></p> <p>The RRC sought to enhance the skill base of the sector and in so doing, to enhance the growth potential of companies in the sector. This was achieved through:</p> <ul style="list-style-type: none"> <li>• Co-ordination and delivery of a range of flexible advanced skills training and professional development opportunities</li> <li>• Development of employer-led and tailored courses to meet their requirements</li> <li>• Offering Advanced Apprenticeships</li> <li>• Identifying progression routes and describing these on a bespoke RRC website</li> </ul> <p>The RRC was ideally situated in Farnborough, a key aerospace sector hub in the UK.</p>	
<p>Lead organisation: Farnborough College of Technology</p> <p>Final funding: £450,517</p>	<p><b>Outcomes</b></p> <ul style="list-style-type: none"> <li>• In excess of 40 courses delivered to 202 participants</li> <li>• 42 SMEs engaged and IAG delivered to 174 individuals</li> <li>• 79 Level 3 NVQ units attained</li> <li>• E-learning materials developed for a Composite Materials Technology unit and for an Engineering Project Management element of a degree programme</li> <li>• Aeronautical Engineering BSc Degree Unit in Composite Material Technology developed</li> <li>• Website developed <a href="http://www.aerospacerrc.co.uk">www.aerospacerrc.co.uk</a></li> <li>• Group Apprenticeship scheme developed to enable the piloting of an Advanced Apprenticeship in the Maintenance Repair and Overhaul sector</li> <li>• 36-week customised Technical Certificate (C&amp;G 2261) developed to mirror the aircraft engineering licence JAR 66, by providing the “Hand Skills” and underpinning knowledge needed to become a CAA licensed engineer</li> </ul>
	<p><b>Impact</b></p> <ul style="list-style-type: none"> <li>• Business provided with skills enabling them to expand into new areas</li> <li>• Employees’ skills kept current and thus business more able to maintain their competitiveness</li> <li>• Customers’ expectations of skilled staff met</li> <li>• Niche skills gaps in smaller companies filled</li> <li>• Greater co-ordination of provision in the sector</li> <li>• Employers enabled to apply new technological developments</li> </ul>
<p><b>Quotes from participants</b></p> <p><i>“It was a very interesting project and all the staff who have taken part have made a difference to the company.”</i></p> <p><i>“The course manual has been a great help and I use it every day in my job. I really learned a lot.”</i></p> <p><i>“Doing these courses makes a great improvement to my ability to do the job right.”</i></p> <p><i>“It was a good and worthwhile experience – I am keen to do more.”</i></p> <p><i>“Brought me up-to-date with aviation safety.”</i></p> <p><i>“I have spent my whole working life in the plane industry so I am well trained but the course was interesting and helped with new ideas of safe practice at work.”</i></p> <p><i>“Gave an insight into doing what is correct in my job.”</i></p>	

<p><b>Round 6: RRC Marine</b></p> <p><b>Aim and Approach</b></p> <p>ESF supported the establishment of a RRC for Marine Technology. The RRC:</p> <ul style="list-style-type: none"> <li>• Provided a dedicated access point for marine-based industries to obtain and facilitate access to training solutions for structural engineering and manufacturing methodology</li> <li>• Is based at Southampton City College’s Marine Technology Centre, which houses purpose-built composite technologies workshops</li> <li>• Is located in Woolston, adjacent to the River Itchen</li> <li>• Provided generic and marine-specific technical training spanning Levels 3–5</li> <li>• Facilitated a network of businesses to receive brokerage support</li> </ul>	
<p>Lead organisation: Southampton City College</p> <p>Final funding: £499,950</p>	<p><b>Outcomes</b></p> <ul style="list-style-type: none"> <li>• 70 participating companies</li> <li>• 25 different courses offered – most at Level 3 to over 100 participants</li> <li>• 122 learning opportunities delivered</li> <li>• 46 individuals completed at least 1 unit at NVQ L3–5 or equivalent</li> <li>• 76 participants received vocational training spanning Levels 3–5</li> <li>• Website focused on marine skills developed <a href="http://www.marinerrc.co.uk">www.marinerrc.co.uk</a></li> </ul>
	<p><b>Impact</b></p> <ul style="list-style-type: none"> <li>• Increased productivity and efficiency</li> <li>• Increased business opportunity</li> <li>• Improved staff satisfaction levels</li> <li>• Greater clarity of provision on offer in the region</li> <li>• Improved understanding of employer need and demand for learning</li> </ul>
<p><b>Quotes from participants</b></p> <p><i>“I have already done NVQ level two so this course is really stretching me, and I am using what I learn at work all the time.”</i></p> <p><i>“My firm have given me a lot of encouragement with the course, and the engineering I am learning is really useful at work.”</i></p> <p><i>“The course is made up of different parts, and each part taught is used in the work I am doing – I had to go on the course first and then a job was found for me.”</i></p> <p><i>“...such a lot of courses are a complete waste of time, we need to understand the level at which it is being pitched, but this course was very capable.”</i></p> <p><i>“This course has given me the foundation to do exactly what I wanted to do in offering me the chance of learning all the skills necessary to set up on my own.”</i></p>	

## 2.4.2 Sustainability and Legacy

Many employers paid full cost for their courses. This reflects the success RRCs have had in assessing what provision is needed by employers, and addressing those market failures where mainstream courses are not able to meet those needs, with some courses unique in the UK. All those participating in the RRCETS courses paid full cost as did many others who were ineligible for ESF and those returning to a RRC, having already taken part in training subsidised by the RRC. The Marine RRC in particular had high numbers of returning employer customers, demonstrating good potential for sustainability.

### **RRCETS**

Business Support Kent CIC was unsuccessful in the Round 1 of ESF Programme 2007–10 with an application for ESF to further develop the services offered by the RRCETS. However, stakeholders are investigating other funding sources in order that they might continue and grow; for example, there are plans to develop a demonstration facility and advice centres to allow businesses to observe what is on offer and how their engagement might result in competitive advantage. There are also plans to develop an additional 10 Environmental Technology modules and to seek additional providers to support the delivery of these.

### **Advanced Technology RRC**

Put simply, the ability to secure funding will determine the extent to which this RRC is sustainable. They will be applying for ESF in the next tendering round. Courses will continue to be offered through the individual partners either on a commercial full cost basis, or if funding is secured on a subsidised basis. All partners are keen to see the RRC continue, particularly as it has close synergy with the creation of the Harwell Science and Innovation Campus, announced in the March 2006 Budget Statement which will be led by the STFC. They are also working with the New Buckinghamshire University on the development of a sector specific foundation degree and have applied for funding from Foundation Degree Forward to pilot this.

### **Space/Aerospace RRC and Marine RRC**

These two RRCs have been successful with an application against the RRC Aerospace Marine specification under the ESF Programme 2007–2010 with a target of supporting 800 participants to up-skill at Level 3 and above. They will be working jointly on the delivery of their projects, along with PERA, but will maintain their separate identities. Both will continue to offer subsidised training and full cost provision. The RRCs' experiences have influenced the design of the ESF specifications, which now reflect a less qualification-bound approach, and a longer period to embed good practice and impact on the sector.

As part of their plans to achieve sustainability, the **Marine RRC** is also supporting the Engineering Skills Strategy (Marine) Training Pool by developing and delivering CAD/CAM training up to Level 5 to underpin key areas of innovation. They also plan to extend the provisions of courses to employers in allied industries on a full cost basis.

## 2.4.3 Advice to Projects

### Qualification attainment

- Many have found that it takes longer than they anticipated to adapt and get qualifications formally accredited. Make sure you build sufficient time into your project plan if this is one of your objectives. The accreditation process for the RRCETS resulted in an almost six-month delay for this project.

### Engaging SMEs

- Once projects are ready to deliver, they often find it more difficult to recruit SMEs than they had anticipated. Some of the RRCs struggled to achieve their SME engagement targets. Employer engagement is one of the key areas of concern to project managers. Where projects have been successful it tends to be due to their high quality service, targeted needs-led delivery, good communication and networking and credibility with the target group, rather than their ability to produce good-looking marketing materials. Investment of time and resource in networking with intermediaries should be a priority from the outset. Providing clear information about what it is you have on offer and to whom, making as clear as you can the eligibility requirements is essential as is helping intermediary organisations and potential employers know who you are and what you offer. Keeping in contact with brokers is also of key importance.
- One RRC found telemarketing to be their most effective tool, so this is worth considering as part of your marketing armoury.
- The **Advanced Technology RRC** found that it would have been more beneficial to have marketed business solutions rather than training packages. This means you, or a skilled broker, will have to identify and discuss a business need before offering a training solution. Here is a quote from them which encapsulates this finding: *“You can sell quality improvement but you can’t sell measurement.”* It is of course easier to offer something when you know what the specific need is, so investment in establishing this should prove worthwhile. It was common for RRCs to find that smaller businesses were not clear what their needs were, and welcomed advice in this area.
- Following on from this, the RRCs found that SMEs were often not able to state what training they wanted, nor how long they would be prepared to release staff for training. A successful tactic to address this uncertainty was the publication of a prospectus of what was on offer to help companies to reflect on what it was they would find it most useful to engage in.
- Short course targets were on the whole met by the RRCs. It is these that employers appear to have most demand for, particularly where flexible delivery is also an option.

### Administration and eligibility checks

- Issues around administration and eligibility centred around getting participants to complete forms in order that projects were able to claim, and cross checking this information to check eligibility. A significant number of those that took part in RRC activity were not eligible and therefore did not attract ESF funding. Making sure you have in place clear marketing which describes the eligibility requirement is key. Consider also posting or emailing the relevant forms prior to activity to allow participants the time needed to complete the form correctly and to find information such as their national insurance number.
- Consider the benefits of having in post a high quality Administration Manager. RRCs report that the benefits of this significantly outweigh the costs. In addition to supporting administrative activity, it can also help free up project manager time to focus on engaging with employers and driving the project forward.

### **Marketing databases**

- If you require access to Business Link databases it is a good idea to arrange this at the earliest opportunity as other RRCs experienced some delays in the arrangement of use of these.

### **Partner roles**

- Make sure that at the tender stage you are clear what each partner is responsible for. Lack of clarity in this area could affect funding as poor performance of a partner can lead to increased burden on the remaining partners, and impact heavily on funding. Consider the extent to which you can link partner and sub-contractor funding to outcomes rather than activity. This will help minimise any financial risks.

## 2.4.4 Recommendations for SEEDA

### **Collaboration**

- If RRCs are to continue there should be some joint branding along with a shared vision to bring the RRCs closer together and to enable them to share ideas with regard to future development, marketing and publicity. RRCs also seemed to benefit from the RRC network meetings which were held during the first few months of the project. It is recommended that these continue in some form.

### **Train to Gain**

- RRCs have all been disappointed with the low number of referrals made to them by Train to Gain (T2G). T2G brokers are working with employers to identify their business needs, yet it appears that none of the RRCs have received referrals from them. Either the RRCs' expectations of the brokers need to adjust, or T2G brokers need more intensive training in understanding these specialised sectors and what RRCs are and have to offer, particularly in view of the broadened provision of T2G to include Level 3 skills.

### **Providing subsidies**

- The RRCs found that employer engagement in training was highly price sensitive, but that once engaged some employers did return for more training, for which they paid full cost. The subsidy has clearly been of significant advantage to the three RRCs that offer this benefit, but further analysis would be required in order to understand fully the extent to which this influences employer engagement, as the Environmental Technology RRC achieved well despite charging at commercial rates.

### **Unrealistic expectation of time to develop qualifications**

- Where qualifications are to be developed projects need to consider the lengthy and time-consuming process that needs to be adhered to before accreditations for qualifications can be formally "offered" to participants. Project managers have underestimated the time this will take which has impacted on target attainment.

### **Achieving region-wide coverage**

- Most RRCs, with the exception of the RRCETS, tended to serve the needs of their locality and not achieve good geographic spread. RRCs should consider how to reach out to businesses in a wider geographic area; for example, through more extensive use of web-enabled technologies such as those employed by the RRCETS, through use of the Business Link network and through linkage with Technology Skills Managers.

### **Websites**

- These were more successful when populated with current and accurate information about what was on offer, to whom, where and when; where particular attention was paid to search optimisation; and where efforts were made to ensure information was updated. An example of this is the Marine CoVE website. Future contracting for websites should include these aspects of good practice.

## 2.5 Business Growth and Development

### 2.5.1 Summary

Five projects were awarded funding to focus on business growth and development in the South East. Four were “action” projects, providing direct support to individuals, and one a research project, providing knowledge to inform investment in addressing the skills needs of the manufacturing and engineering sector. Collective funding for projects totalled £1,887,611.

Two projects were led by the Engineering Employers Federation. One, **Lean Techniques for Advanced Manufacturers**, focused on providing lean skills to those working in administrative functions in the manufacturing sector, engaging 91 businesses and 700 employees; the other, **Service Excellence**, introduced the principles of best practice customer service into selected service sector SMEs, engaging 27 businesses and 200 employees. Both resulted in significant improvement in processes and the opportunity to reduce internal costs. The **Value** project provided specialist brokerage and mentoring to the Advanced Manufacturing sector, which resulted in increased opportunity to match the technology needs of businesses with technology providers in Universities and Research Technology Organisations. 215 SMEs, 24 large companies and 28 Universities received support. **Going for Growth** facilitated company growth for those with fewer than 50 employees, through a series of workshops and one-to-one training events delivered by Cranfield School of Management and PERA. 69 companies took part with some reporting an increased number of positive impacts on their businesses. The **Skills Blueprint** project resulted in a skills “blueprint” to help address the skill needs of the manufacturing and engineering sector in the region.

Collectively these projects have contributed to the urgent need, as stated in the RES 2006–2016, to assure the prosperity and future competitiveness of the region by ensuring businesses become more enterprising, innovative and skilled. They have resulted in:

- Greater knowledge transfer and innovation thus making a contribution to the RES target to increase the proportion of businesses in the South East reporting R & D links with Universities.
- Improved productivity of the workforce thus helping to achieve the RES Smart Growth, Skills target and Employment target.

A brief summary of each project follows.

**Round 3: Lean Techniques for Advanced Manufacturers**

**Aim and Approach**

The project delivered workforce development training coupled with workplace learning to increase the number of people trained to deliver lean improvements within the lean office or service area. Lean is the philosophy of eliminating those activities from a business which do not directly add value to a process (i.e. waste). The training would ensure that these individuals would be equipped to introduce the principles of lean into the administrative areas of manufacturing companies. This would:

- Help businesses introduce and drive process improvements, and
- Create an opportunity to reduce internal costs through the use of lean tools and techniques

Lead organisation: Engineering Employers' Federation (EEF) South

Final funding: £1,002,428

**Outcomes**

- 249 companies recruited
- 446 individuals supported
- 173 employees gained a Business Improvement Techniques NVQ Level 2

**Impact**

NVQ training (100% reported increase in motivation and personal confidence)

- 47% report an increase in workplace organisation
- 42% report an awareness of the need to ensure time and resources are allocated to driving improvements; 30% reported a reduction in unnecessary paperwork
- 25% reported an increase in company morale and process efficiency
- Individuals commented that their non-value-activity reduced by 27%

Lean Office Training

- Process efficiency improved by 42% and documentation levels were reduced to 41%. Workplace organisation improved by 34%
- 70% felt they had improved their knowledge of non-value-added activity, 60% better understood the need for change and 40% felt they had improved their customer service skills
- 90% believed confidence and motivation had improved and that the benefits had lasted more than 6 months

**Case Study: Technograph Micro Circuits Ltd**

Technograph Micro Circuits Ltd produce electronic micro-circuits for the space and defence industry. Competition has increased from China and customers are expecting the company to make products better, quicker and more cheaply than ever before. Lean illustrated that staff were sometimes doing things that had little value and that were quite simply not needed by internal or external customers. Post-training, a piece of work arrived with a really challenging turnaround deadline of one week. Staff applied the lean techniques learned, and this enabled them to see that the area where they could really reduce time was in managing the paperwork trail. The team reduced the paperwork time from 80% of the total activity to 20% of the total activity. This insight and subsequent actions ensured the target was achieved.

**Round 5: Service Excellence**

**Aim and Approach**

The aim of the Service Excellence programme was to introduce the principles of best practice customer service into selected service SMEs in the South East region. Such an approach was to ensure businesses deliver to customers’ needs and expectations. Service Excellence training was delivered in a 6-day workshop, tailored to the outcome of an initial review between the business and an EEF consultant completed on Day 1 of the training. The programme took place over a period of 3–4 months. The aim was to equip service SMEs with the skills needed to make customer service improvements such as:

- Reducing lead times
- Enhancing right first time process performance
- Understanding what actually adds value to the customer experience

<p>Lead organisation: Engineering Employers Federation (EEF) South</p>	<p><b>Outcomes</b></p> <ul style="list-style-type: none"> <li>• 30 businesses took part</li> <li>• 206 employees took part with 195 completing training</li> <li>• University of Portsmouth produced a customer survey for completion by participating company employees and external customers to gather information which then informed training content</li> </ul>
<p>Final funding: £255,580</p>	<p><b>Impact</b></p> <ul style="list-style-type: none"> <li>• Training was perceived by participants to result in a 60% increase in process efficiency and inter-departmental communication, 40% improvement in customer service levels and 30% increase in value-added activity</li> <li>• 90% of respondents “agreed” or “strongly agreed” that their understanding of the importance of excellent customer service had improved</li> <li>• 100% agreed that the training had improved customer service</li> <li>• 100% believed that training would be of medium and long-term benefit</li> </ul>

**Case Study**

Shipshape Cleaning employ a team of 5 office-based staff and over 70 cleaners. They specialise in commercial cleaning contracts, providing their services in and around the Thames Valley. The company has grown continually over the past 5 years, and, with the introduction of a new service, felt the time was right to assess the operating procedures such as sales, planning, scheduling, purchasing and finance to ensure they were enabling the business to move forward. The information gathered by the Customer Value Management Survey sent to clients helped the company to develop an understanding of the difference between expected versus received services. This was used to identify areas for improvement through the elimination of inefficient activity and the streamlining of business processes. This resulted in enhanced customer service, streamlining of the entire administration functions, streamlined payroll and invoicing functions, and a reduction in the overall lead time for providing quotations. This led to enhanced relationships between Shipshape and their suppliers, a reduction in paperwork and increased use of IT to maximise transparency of processes. All staff continue to employ the principles of Service Excellence.

**Round 5: VALUE****Aim and Approach**

VALUE was a specialist technology brokerage and mentoring service. It aimed to match the technology needs of South East based SMEs in the Advanced Manufacturing sector with technology providers in the Universities and Research Technology Organisations (RTO). VALUE also provided specialist mentoring to support operational and technological change to increase business performance.

Lead organisation:  
Technology Enterprise Kent

Final funding:  
£310,200

**Outcomes**

- 13 technology transfer projects have reached a successful conclusion with a number of live projects still underway
- 267 SMEs received specialist advice
- 49 SMEs received mentoring
- 24 large companies received specialist advice
- 28 Universities received specialist advice, 12 went on to receive mentoring
- A website was developed which received over 3000 hits monthly and 105 registered technology needs or wants
- 5 brokerage events were held
- The Research Report identified the SMEs most open to Innovation and Knowledge Transfer and discussed the barriers to success and how to improve collaboration between business and academia

**Impact**

- 77% SMEs questioned confirmed that they had acquired or expected to acquire knowledge as a result of taking part in the VALUE programme
- 28 Universities are now better equipped to promote themselves to SMEs in the advanced manufacturing sector in particular
- 50% SMEs attending brokerage events said they were more likely to seek technology input from Universities in the future

**Case Study: Jiskoot**

Jiskoot is a leading international provider of sampling, blending and multiphase measurement solutions for the oil and gas industry. Following contact generated by a mailshot, Jiskoot were visited by a mentor who identified that their main requirement was for a meter that could measure the water content in oil. Jiskoot called this a "Water in Oil Meter" (WIOM). The specialist mentor published a description of this requirement on the *Innovation Relay Centre* database and distributed it to selected technology providers who subsequently forwarded the description to Oxford Sensors. This company, it transpired, was already developing a WIOM based on radio frequency absorption. Jiskoot also received information from other companies with a potential solution, but selected Oxford Sensors. As of March 2008, Jiskoot were negotiating a contract with this technology provider.

**Round 6: Skills Blueprint**

The aim of this research project was to develop a vision and skills “blueprint”, a document which sets out a strategy to guide and inform regional investment in addressing the operational training and skills needs of the manufacturing and engineering sector. The blueprint was to help develop a skilled and innovative manufacturing workforce to be better able to compete globally in the medium to long term.

<p>Lead Organisation PERA</p> <p>Final Funding £99,408</p>	<p><b>Outcomes</b></p> <ul style="list-style-type: none"> <li>• Preliminary mapping of the existing supply of skills training and initiatives and support programmes for the sector and sub-sectors, which will be key to determining the changes required to deliver the vision</li> <li>• 2 workshops bringing together key partners, including funding bodies, training providers and employers, to define the vision and to begin to work on the blueprint</li> <li>• Skills Blueprint model recommended</li> </ul>
	<p><b>Conclusions</b></p> <ul style="list-style-type: none"> <li>• Business support on offer is often not understood. There is a need for a more easily understood “offer”</li> <li>• There is a need to better align supply and demand for skills</li> <li>• Access points for information and access to training solutions are needed</li> <li>• A rationalised set of courses and training taking into account the Sector Qualification Strategies is recommended</li> <li>• There is good opportunity for improved industry engagement with the education sector</li> <li>• Marketing and communications strategy and primary/secondary routes to market are needed</li> <li>• More effective mechanism for promoting engineering and manufacturing careers to pupils and teachers are recommended</li> <li>• Better mechanisms for developing CPD for lecturers are needed so that they understand and promote up-to-date developments in the sector</li> <li>• “Super brokers” are what businesses need and want. These are consultants with high level experience of the sector who are trained to carry out informed, sector specific brokerage advice, and who can develop a long-term and trusted relationship</li> <li>• Knowledge that businesses need advisors that understand <i>their</i> business and the sector in which they work</li> <li>• Conclusion that the results should be marketed rather than the activity. So, not “<i>Business Improvement is what you want!</i>” but “<i>Do you want to reduce wastage?</i>”</li> </ul>

**Round 7: Going for Growth**

**Aim and Approach**

Going for Growth aimed to facilitate company growth within 12 months. Business Link Solutions offered workshops and one-to-one training to companies with fewer than 50 employees within the South East region to support growth and increase profits. These companies were supported in developing a growth strategy to support this development activity.

- Owner/Managers were invited to attend structured training workshops offered by PERA, with additional Optional Modules focusing upon growth
- The PERA programme is a precursor to the SEEDA High Growth Programme; owner/managers showing significant growth were invited to this advanced programme
- Owner/managers of businesses already showing growth were offered training at the Cranfield School of Management

Lead organisation:  
Business Link Solutions

Final funding:  
£219,995

**Outcomes**

- 9 promotional events were held throughout the South East
- 69 companies participated in either a Business Growth and Development programme with Cranfield School of Management, or an Encouraging Growth training programme of structured workshops offered by PERA
- 45 owners/managers attended 4 structured 1-day training workshops, receiving 4 core modules, addressing **Vision and Strategy, Strategic Marketing, Innovative Leadership, and Change Management**
- 40 owner/managers completed 4 core modules from the structured workshops offered by PERA
- 63 owner/managers enrolled to attend one or more optional modules
- 15 owner/managers received a progress review 3 months after training

**Impact**

Participants report the following impacts on their business:

- Increased gross margin by 7%
- Improved marketing techniques which have generated more opportunities
- Measuring staff capabilities to ensure staff are in the right role
- liP accreditation, ISO/9001 GAP analysis, production of quality manual, investment in MIS, skills evaluation, brand and service proposition review
- Getting more customers
- Piloting new business, collecting debt more effectively and delegating more responsibility to staff

**Case Study: Dean Gray – Owner/Manager Graymatter**

Graymatter is a design and marketing company based in Milton Keynes that has enjoyed significant growth. Participation has resulted in Dean being better able to prioritise his business improvement plans; for example, he has recently piloted software to replace the cumbersome paper-based systems used for the automation of operational data, which has significantly saved time and increased efficiency. Taking part has also played a role in achieving success with ISO 9001 and Investors in People accreditation.

## 2.5.2 Sustainability and Legacy

### **Some project activity will continue**

The Engineering Employers Federation (EEF) now offers all those that took part in either of the *lean* programmes the chance to undertake further improvement activities or sustainability programmes, although this is at the normal commercial rate for intervention which can be a barrier to organisations.

The **Value** project will not continue in its current form, although there remain a number of technology searches which are ongoing and which may result in a technology transfer opportunity. Business Links, the Innovation Advisory Service South East, Knowledge Transfer Networks and the Manufacturing Advisory Service South East (MAS-SE) all play a role in connecting SMEs with an appropriate University or broker. The lessons learnt by the **Value** project and the published report showing how to improve collaboration between businesses and academia are well placed to inform their activity.

The extent to which the *Skills Blueprint* model will be applied by the sector is less clear and further follow up activity will be needed in order to report on the extent to which this has influenced activity in this area.

The *Going for Growth* programme will not continue, although clearly Cranfield Management School will continue to offer this already well-established programme at their usual commercial rates. PERA created the training as a pilot as part of a new programme and there are now plans to commercialise this, thus increasing the availability of high quality business growth support on offer to businesses in the region. PERA believe people will pay commercial rates to attend an “enhanced” version of the programme, which will include coaching and mentoring. There are also plans to set up a networking group of participants.

### **Lean Projects legacy**

With only one exception, all participants on the Service Excellence project believed that the benefits brought by the changes realised as a result of taking part would be sustained for longer than 12 months. 90% of those that took part in the Lean Techniques for Advanced Manufacturers believe the benefits would last more than 6 months. This evidence, gathered directly from project participants, illustrates the lasting effect of the lean programmes on businesses.

## 2.5.3 Advice to Future Projects

### **Marketing**

- Direct marketing to businesses who are open to the idea of attending an event aimed at marketing business development activity and/or technology transfer support may not be sufficient in helping you identify a sufficient number of suitable organisations to enable you to achieve targets. Personal contact is key. Work closely with those who are trusted by your target audience and who have good credibility.

### **Parallel projects**

- Where projects have used more than one provider there has been some evidence of commercial tension between those providers where they are delivering similar products. Those leading the project should consider carefully how they will use the relationship between providers to add value to the project. Expectations of co-operation should be clearly set out at the outset. Consideration should be given to recording those expectations in Service Level Agreements to ensure clarity.

### **Networking forums**

- Participants report that they gain benefits from the chance to take part in both formal and informal peer group networking forums. The opportunity to share thoughts and issues confidentially in a challenge and “risk free” supportive environment has been very important and it is worth considering how you might build in opportunities such as these to business growth programmes.

### **Individual Learner Records (LRs)**

- Consider emailing or posting these to participants a week or so before the event in order that they can have more time to complete the form and to get back to you with any queries should they arise.

### **Partners**

- Consider formal contracting with partners with targets and financial rewards. What might be agreed at the outset, despite completion of partner declaration forms, has often not been realised, particularly where partners' roles are focused on employer engagement. Do not depend on partners to engage participants when developing marketing plans unless you know them very well and know they can deliver.

## 2.5.4 Recommendations for SEEDA

### Marketing

- Once again, personal invitations and mailshots were on the whole of limited value. Although they generally achieved a national average of 1.5% hit rate when they were focused on getting SMEs to attend events, numbers who then chose to enrol onto mentoring/specialist advice programmes as marketed by the events tended to be very disappointing. In addition, projects need to be aware that they should not “coerce” attendance to events by promising things they are unlikely to deliver, such as “opportunities to win new business”. Where this happened, delegates were believed to have been frustrated by those marketing messages on finding that they were not realised.
- Again, making sure that projects make every effort to use brokers with good credibility is key to ensuring success, particularly where projects have narrow target markets and thus a smaller pool from which to recruit.

### Narrowing the target market

- In addition, not having an agreed “SIC code” for the target sector has created a barrier to marketing for projects. A clearer definition of the sector would be useful to such projects.

### Identifying the target group

- It appears that it can cause confusion to link programmes to an industrial sector, where the service provided is not immediately associated with the sector (e.g. lean office for administrative staff in the manufacturing sector).

### Parallel projects

- There is some evidence of commercial tension between providers where they are delivering similar products. Project leads need to consider carefully how they will manage such tensions where they contract with more than one provider to deliver services. Service Level Agreements might ensure greater clarity in this area.

### Technology transfer: link to other initiatives

- With regards to supporting technology transfer, consideration should be given to supporting linkage to wider initiatives which aim to support technology transfer, such as the Science Technology Engineering and Manufacturing (STEM) support centre, created to rationalise and bring coherence to STEM initiatives, the Information Advisory Service and to programmes arising out of the Higher Education Innovation Fund. This will add more value than independent activity can alone.
- There appears to be a crowded landscape with regard to support for increasing linkage between business and Universities and RTOs. Achieving the culture shift needed to encourage greater technology transfer between SMEs and Universities and RTOs will take significant resource and effort. Greater co-ordination of existing activity is recommended to ease access to funds for business, and to increase Knowledge Transfer Partnership activity, rather than the creation of new projects.

### Individual Learner Records (LRs)

- This continues to impact on projects as they are lengthy and time consuming to complete, and are of course largely targeted at SMEs who are often time poor. Perhaps posting or emailing the form prior to activity would allow participants the time needed to complete the form correctly and for them to get back with any queries at that point, rather than at the event itself.

**Equality of Access Plan (EAP)**

- Projects have welcomed the EAP process. It is recommended that innovations and change that have evolved as a result of the introduction of the EAP process are monitored and examples of good practice disseminated to all existing and new ESF projects to inform future developments targeted at ensuring equality of access.

## **2.6 Web Tool Development**

### **2.6.1 Summary**

Experian were awarded funding to develop a free access web-based tool able to provide robust and reliable skills, employment, economic, social and environmental information for local researchers and policy makers – with the ability to interrogate data on a regional, sub-regional and local basis to support evidence-based policy making. The website was launched in July 2007 and has greatly exceeded its target of 40 unique visits per quarter with 160 unique users accessing the site monthly. All project targets have been achieved. The resource has provided a much-needed centralised point of access to data, minimising the risk of duplication of research effort and maximising the use of data to support evidence based policy making. What is less clear is the extent to which the data is being used in this way as users of the website have not been surveyed.

### **2.6.2 Sustainability and Legacy**

Experian have entered into dialogue with SEE-IN regarding the potential to increase the number of datasets contained in the site and upload additional time series data where possible. SEE-IN are planning on maintaining the site and updating the data, though they are yet to decide whether updates will be undertaken in house, or contracted out to consultants.

**Round 6: South East Intelligence Network Hub (SEE-IN)**

**Aim and Approach**

SEE-IN provides free access to a centralised web resource of data and intelligence in the South East:

- It provides a single point of access to core **local** level data to **local** stakeholders to help support research and evidence-based policy making and to provide a source of data to inform strategies, bids, appraisals and equality impact assessments
- The information available includes skills, employment, economic, social and environmental data, all of which can be gathered from one single site
- Registration to the website to access the information is not compulsory, but does bring benefits such as multiple user defined study areas and the facility to load additional data onto the tool to facilitate the sharing of data
- Users can analyse, tabulate, chart and map data on screen, or download data as a report or raw data file

Lead organisation:  
Experian

Final funding:  
£ 100,000

**Outcomes**

- Approximately 165 unique visitors to the website on a monthly basis, far in excess of the anticipated project target of 40 unique visitors per quarter
- Data audit of more than 40 primary and secondary data sources, all systematically evaluated
- 60 attendees at the website provider’s launch event including local authorities, SEEDA, Strategic Health Authorities, and local Learning and Skills Council representatives
- 23 consultations undertaken with a wide variety of stakeholders – including SEEDA, SEERA, GOSE, LSC, Jobcentre Plus and Local Authorities. The outcomes from these consultations have been applied to inform the site’s content and functionality
- 136 indicators from 26 data sources are available, covering a range of themes including the economic, skills, social and environmental agenda. All indicators are accompanied by detailed metadata
- User Acceptance Testing has been completed for the website
- Users are able to access, manipulate and download data without registering; this was deemed to be a desirable facility following focused consultation activity
- At time of launch, 95 indicators were available at district level and at a more local level and 37 time series indicators were available

**Impact**

- 23 stakeholders were consulted to ensure the Data Hub included the volume and appropriate type of data required to inform research- and evidence-based policy making
- SEEDA were closely involved in the process of selecting and confirming the indicators to be included in the site
- Users of the website have as yet not been surveyed to evaluate who they are, how easily these users are able to access information, and how this information is being used. As such, it is not possible to include a case study to illustrate the impact of this project

## 2.6.3 Advice to Future Projects

### **Maintain close working with contractor**

- It was found that close working and regular communication between the SEEDA and Experian/Active project regarding data, content and functionality of the site were pivotal to the success of the development, set up and launch of the Data Hub. The SEEDA project team input into each stage of the project process, reviewing and agreeing the functionality, look and feel of the Data Hub; the data and metadata to be held in the site was valued by Experian together with SEEDA's input concerning the venue and attendees for the launch event. Experian felt that the web-development process would have benefited from even more regular informal discussions and meetings with SEEDA to talk through the functional specification and really bring to life the plans for how the site would function, prior to the more formal User Acceptance Testing.

### **Consultations**

- These are key in promoting awareness and buy-in amongst stakeholders with those who would potentially benefit from the site and a launch event.

### **Build in informal testing**

- For future projects, more regular informal testing of the site would facilitate a more iterative process and help bring the functional specification of the site "to life".

### **Administration managements**

- The additional project management time required to meet the ESF administrative requirements, particularly compiling the Quarterly Progress Reports (QPR) and preparing for the Quarterly Progress Meetings were made easier by creating indexes to the QPR evidence and hyperlinks for the evidence kept on site for monitoring visits.
- This project suggested that greater resource should be allocated for project management given the additional administrative burden linked to the ESF requirements for evidence and monitoring.

## 2.6.4 Recommendations for SEEDA

### **Clarify the target audience**

- It would be useful to clarify who the target audience for SEE-IN is. Information regarding the extent to which the site has resulted in evidence-based policy formation, informed decision-making and targeted investment. Feedback on how quick and easy the site is to use, particularly for those with little technical ability or econometric know-how, and the extent to which individuals feel able to source their own data and undertake their own analysis, should be gathered and used to underpin any further developments to SEE-IN.

### **Extent to which site has local data availability**

- A stakeholder who was contacted in support of the evaluation expressed some uncertainty with regard the extent to which the Data Hub could and was being used to generate and analyse local data. Perhaps this could be assessed in line with the above recommendation.

## 3 Summary of Sustainability, Advice and Recommendations

### 3.1 Project Sustainability

The majority of projects will have a lasting legacy; many will continue in some form:

#### Toolkits and web-based resources

- Some such as the **Diversity Means Business** and **Welcome E-learning** projects produced toolkits and other resources, and continue to provide free access to these on the web.
- A web-based tool to support free access to a centralised web resource of data and local intelligence in the South East will also continue as plans to increase the number of datasets available are realised.

#### Services being offered at commercial rates

- Projects such as **Going for Growth**, the two “lean” projects and the **Regional Resource Centres** (RRCs) are offering services at commercial rates to maintain sustainability. The **Marine RRC**, as part of its sustainability strategy, is extending its generic services to allied sectors.

#### Use of other external funds

- Some projects have managed to secure other external funds such as further ESF. Other organisations linked to projects have adopted models proven with ESF, and have secured funding to do this; for example, National Lottery funding has been awarded to support the use of the *Creative Leadership Model* in Kent.
- The **Marine RRC** and the **Aerospace and Space RRC** submitted a joint application against one ESF Specification and were in this way successful in securing further ESF. They aim to support an additional 800 individuals at Level 3 and above over the next two years. The **Environmental Technologies** and **Advanced Technology RRC** are continuing to seek funding to carry on their work through partnership activity, qualifications development and by offering services at commercial rates.

#### Transition to new projects

- **Merlin Mentoring** has transitioned into the new Enterprise Hub network mentoring programme and as a result 100 additional entrepreneurs have received mentoring since ESF funding ceased.

#### Projects influencing others

- There is clear evidence of projects influencing activity. For example, **Merlin Mentoring** supports **Funding Enterprising Women**, which helps female entrepreneurs raise finance for their business.
- The **Creative Leadership** project has resulted in the development of three additional projects, one of which will have coverage for disabled people throughout England through use of “Big Fund” funding.

#### Links to other initiatives

- The successful **Management Development through Action Learning** project hopes to secure Train to Gain and possibly Leadership Development Advisor support as part of their sustainability strategy.

### **Qualifications development**

- A range of new, demand-led qualifications have been developed, such as a Level 5 Social Impact Award; three ILM accredited Level 5 RVQs to enable business advisors to understand, promote, develop and sustain social enterprises; and an Advanced Apprenticeship in Maintenance Repair and Overhaul. A sector specific foundation degree is under development.

## **3.2 Advice to Future Projects**

The following advice has been compiled following feedback from projects. It is intended to be used by current and future ESF project managers:

### **Marketing**

- Focus on business benefits when marketing your services, not the offer itself.
- Spot where your project will help you address legislative requirements for companies. Market this.
- Links to intermediaries are far more effective in marketing than mailshots and events. Focus on developing good relationships with intermediaries for this reason. Make sure they understand clearly what your offer is.
- Make sure project details are included on Train to Gain and Business Links databases.
- Define the offer clearly. For example, not all employers and perhaps even brokers will know what an “action learning set” or “mentoring” really is, nor the benefits they bring.
- Ensure the project name is clear and succinctly defines the support on offer.

### **Partner management**

- Consider formal, output-related contracting with partners to reduce any financial risk to the lead organisation in the event that targets are not achieved. Formal contracting will also offer clarity of roles and responsibilities.
- Use ICT as a means of communication with partners; for example, Intranets to share materials, reports and evaluation feedback. Regular contact with partners has been a key success factor in engendering robust partner relations.
- Partner only with those that you believe will add value. Less on occasion can mean more as some of the most successful projects have had relatively few partners.
- Consider partners who have a track record of grass roots experience with your target group as these organisations often add value to the planning, marketing and delivery stages of projects.

### **Administration**

- Many projects trained individuals only to find that they were not eligible for ESF. Some SMEs were located in the wrong place, others were too big. Build in good eligibility checks at the outset. Consider emailing guidance on eligibility and enrolment forms prior to events to support this activity.
- Administration Manager posts were found to be very useful in making sure the paperwork was kept accurately and efficiently, and to free up project manager time to drive the project forward.

### **Mentoring**

- One of the most critical success factors is getting the mentor/mentee match right. Investment in this area will pay dividends.

### **Evaluation**

- If you want to provide evidence of the difference your project has made, make sure to establish a baseline of participants' skills and/or knowledge at the outset, and then make sure you measure distance travelled against these throughout the life of the project and, if possible, beyond.
- Where possible collect the information needed to support evaluation at events to improve the quality and to save time and money.

### **Activity**

- Make every effort to ensure the involvement of those that wrote the ESF Tender in the project planning and, if feasible, delivery stages.
- Offer training in bite-sized chunks. Employers have been found to be reluctant to release staff for more than a day at most. Short courses have been found to be easier to market.
- Some employers benefited from seeing a prospectus of courses on offer. At the outset they often were not clear what they needed or wanted. A prospectus helped clarify those decisions for them.
- If you are aiming to develop qualifications be aware that this can take far longer than anticipated. Many projects were "amazed" at how long this can take. Build in contingency in the event that this happens to you.

## **3.3 Recommendations**

### **Impact measurement**

- The extent to which projects focus on measuring the difference their work is making to the participants and the quality, accuracy and consistency of evaluation activity have significantly improved in comparison to earlier ESF Rounds. This has been driven by the combined approach of Evaluation Impact training for project teams as delivered by Spirit Research & Evaluation Ltd and monitoring by SEEDA staff to ensure a consistent approach to evaluation information collection throughout the life of projects. For this reason it is recommended that this approach to evaluation continues. However, it should be noted that there is still a tendency for some projects to focus on outputs rather than the impact of projects. The most common reason given is that there has not been time to realise impact. SEEDA needs to counter this by considering how to attach funding to evidence of actual, or *predicted* impact.
- To support evaluation, telephone contact with participants should be made shortly after their engagement in the ESF support activity. This ensures they remember the activity clearly and that contact details are more likely to be current.

### **Training objectives**

- The telephone survey found a predominance of participants prioritising objectives based on opportunities to develop new ideas and innovation, and help in redefining the organisation and improving skills. Support for innovation should feature as a high priority in future ESF project activity.

### **Equality and diversity**

- Projects focused on equality of opportunity found there to be a case for the development of a South East region Equality and Diversity Strategy to pull together existing and planned activity into one coherent plan.

### Train to Gain

- There is good evidence of projects attempting to link to Train to Gain (T2G) brokerage but some disappointment that those efforts resulted in little added value to their projects as referrals to projects were fairly minimal. To support the Business Support Simplification Programme (BSSP), it is recommended that:
  - Projects clearly describe at the Tendering stage how they will link to business support projects and T2G and what their expectations of T2G are. These expectations then need to be managed by SEEDA.
  - All ESF project details are included on the region's Business Link and Skills South East database. SEEDA contract managers should check that this takes place.

### State Aid

- SEEDA should continue to provide State Aid training as this has helped projects understand State Aid requirements and addressed some of the earlier projects' difficulties in this area.
- There was an example of two projects delivering similar projects (action learning) but charging very different rates for participation. It was not clear how projects had calculated the required employer contribution, but with many projects citing the very cost-sensitive nature of engagement, how these different rates had been calculated should be explored.

### Project partners and links to intermediaries

- Some projects placed a heavy reliance on partners to market and broker their project and they have been disappointed when these expectations were not realised. This has led to financial risk where projects are funded on delivery of activity rather than the number of people supported, with "urgent" marketing activity such as purchase of costly databases, instructing market research consultancies and direct mail to potential participants. Projects will engage employers only if they have high quality services to offer which employers *need*, good credibility, good links with intermediary organisations and the ability to clearly describe their product and how it will be of benefit their business. To address this SEEDA could:
  - look for good track record evidence of these factors in future funding rounds and deep understanding of the need for *continual* linkage with intermediaries
  - share these lessons with current projects and the good practice in this area by projects such as the *Management Development through Action Learning Sets* who ran a highly cost efficient yet effective marketing strategy, aligned to the BSSP
  - encourage projects to put in place formal agreements with partners, and to fund activity based on the achievement of outcomes.

### ICT in support of efficiency and environmental sustainability

- Some projects have made excellent use of ICT to support project planning, delivery, marketing, communication and evaluation. **Social Enterprise London** (SEL) made extensive use through the development of an Intranet site for participants to support communication, access to resources and evaluation. Effective use of ICT will result in some good opportunity for "lean" efficiencies to be made by projects. SEEDA could help disseminate this good practice and encourage projects to describe at Tendering how they will make use of ICT at all stages of project delivery. One word of caution however, web-based "Forums" were not found to be particularly successful by projects and therefore their use needs careful and informed consideration.

### **Expectations of SEEDA**

- All projects have felt well supported by SEEDA's co-financing team, and believe the team have managed the co-financing programme well. Additional support would be welcomed to help:
  - achieve sustainability
  - ensure coherence and minimal risk of duplication with similar projects
  - celebrate the achievement of outcomes and the impact of projects.

### **Sector Skills Councils**

- Whilst some projects collaborated with a relevant Sector Skills Council (SSC), and benefited significantly from those links, others did not. All projects should be encouraged to forge links with SSCs. They are responsible for identifying and addressing skills gaps, and often have excellent local employer knowledge.

### **Segmenting the market**

- The lack of a clear definition of which businesses could be classified as Advanced Engineering made marketing problematic for the project focused on supporting this sub-sector. Caution is needed when focusing on a tightly industry-focused target group for this reason.

### **Equality of Access Action Plan**

- This has proved a valuable process, enabling good response to the needs of clients, and the development of changes and innovations in consultation with SEEDA. However, there is some uncertainty with regard to who is monitoring their impact. It would be useful to clarify this.

### **Awareness of ESF**

- Interviews with participants found that one in four were not aware that their activity had been supported by ESF. This compares well with the 2005 Beneficiary Survey<sup>5</sup> which found only 56% to be aware. SEEDA need to continue to emphasise the importance of this at the Contracting stage.

### **Local Authority engagement**

- There would appear to be the scope to work in closer partnership with Local Authorities, particularly with activity aimed at supporting Social Enterprise and supporting the RES aim of achieving more voluntary sector opportunities for public sector procurement.

### **Meeting the needs of under-represented groups**

- There has been a shortfall in participation from those from black and minority ethnic communities. More investigation would be needed to understand whether this was because unrealistic targets had been set, which is what projects themselves believe, or because projects did not apply the rigour needed to engage with this group.
- There may be the need to target projects specifically at under-represented groups rather than as a proportion of the overall targets. This strategy worked well with the Creative Leadership Project.

### **Websites**

- These were more successful when populated with current and accurate information about what was on offer, to whom, where and when and where particular attention was paid to search engine optimisation – the ability to make web pages attractive to search engines. This is key as most people who use search engines only look at the first page or two of the search results.

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<sup>5</sup> Department of Work and Pensions Research Report No 376: ESF Objective 3: The 2005 Beneficiary Survey for England

## 4. SEEDA ESF Beneficiary Questionnaire – Analysis Report

### 4.1 Summary

A telephone questionnaire interview was undertaken in a sample of n=328 SEEDA ESF training participants to further evaluate the efficacy of these ESF-funded training opportunities and/or activities for Rounds 3, 4, 5, 6 and 7 of ESF funding.

Data were analysed using Excel™ and the Statistical Package for Social Scientists (SPSS™) to evaluate the perceptions of the participants with reference to their training opportunities and/or activities. Data were considered both in terms of the whole sample (n=328) of participants who responded to the telephone questionnaire, and in terms of the five project clusters: Cluster-1 **Equal Opportunities**; Cluster-2 **Leadership and Management**; Cluster-3 **Social Enterprise**; Cluster-4 **Regional Resource Centres**; and Cluster-5 **Business Growth**.

The main findings from these analyses are:

- i. The majority of training participants were aware that their training opportunity and/or activity had been funded by the ESF.
- ii. The training opportunities and/or activities were considered to be relevant to the participants' current employment, and met specific occupational requirements.
- iii. The training events were generally considered to be well organised with clearly identified objectives and well-defined outcomes.
- iv. The participants felt that the training had specifically enhanced their performance in their current post,
- v. And some felt they were better prepared for a future post or role.
- vi. However, the participants were less clear with regard to whether the training events had afforded any general benefits outside of their current role or workplace.
- vii. There were subtle differences in the pattern of response when analyses of the whole sample of training participants' questionnaire responses were considered by project cluster.
- viii. However, these project cluster differences – in the main – were not considered to be significant, and were considered to reflect differences in training activity rather than concerns over provision.

Thus, the ESF SEEDA activity represented a significant positive initiative for providing accessible support to aspiring and actual businesses in the South East region.

## 4.2 Introduction

A telephone interview was undertaken in a sample of SEEDA ESF participants to further evaluate the efficacy of these ESF-funded training opportunities and/or activities. This section provides a description of the research approach adopted to undertake this evaluation, a description of the approach to analysing the data, a commentary detailing the main findings from the analyses, and the conclusions drawn.

## 4.3 Approach

### 4.3.1 The SEEDA ESF Participant Evaluation Questionnaire

A questionnaire was developed to collate information with regards to the participants of the Rounds 3, 4, 5, 6 and 7 SEEDA ESF activities. The questionnaire was divided into three sections:

- Section-1 ascertained demographic information of the sampled participants;
- Section-2 determined information concerning the organisation of the opportunity or activity in which the participants had been involved, the participants' aspirations for undertaking the activity, their views on the training outcomes, and the views, attitudes and understandings of the participants on completion of their activity; and finally,
- Section-3 ascertained the participants' reflections specifically on the training activity in which they participated.

### 4.3.2 Questionnaire Pilot Study

The questionnaire was initially piloted on a sample of n=20 participants during September 2006. Data from this pilot study were evaluated to determine the efficacy of the questionnaire in terms of its administration over the telephone, the validity and reliability of the data collected, and the suitability of the data with reference to subsequent analyses. The pilot study confirmed the appropriateness of the chosen research approach, and the main body of data collection commenced.

### 4.3.3 Questionnaire Administration

The questionnaire was initially administered in December 2006 by way of a structured telephone interview, with a target sample of n=200. A total of two interviewers were recruited to conduct the data collection between December 2006 and April 2007 (Round 3).

The questionnaire was subsequently administered, again by way of a structured telephone interview, to collate the views of participants undertaking activity during Rounds 4, 5, 6 and 7 of ESF SEEDA funding. An interviewer was recruited to conduct the data collection between March 2008 and June 2008.

### 4.3.4 Questionnaire Analysis

The participants' responses during each interview were collated in a bespoke spreadsheet prepared in Microsoft® Office Excel 2003. At the end of the training participant interview phase, data from the Excel spreadsheet was transposed into a statistical software package (Statistical Package for Social Scientists, SPSS™) for subsequent analysis. Data were considered both in terms of the whole sample

(n=328) of participants who responded to the telephone questionnaire, and in terms of the five project clusters: Cluster-1 **Equal Opportunities**; Cluster-2 **Leadership and Management**; Cluster-3 **Social Enterprise**; Cluster-4 **Regional Resource Centres**; and Cluster-5 **Business Growth**.

Descriptive statistics were determined for the demographic data from Section-1 of the questionnaire, and percentage statistics for the proportional representation within the sample were calculated. The organisational information in Section-2 was analysed to examine trends in how participants accessed SEEDA ESF opportunities, the nature of opportunity, and the participants' priorities in terms of objectives and outcomes. Finally, Section-3 was analysed to determine the dominant thoughts of the participants with regards to the opportunities and/or activities in which they had participated.

## 4.4 Results

### 4.4.1 The Participant Sample

A total sample of n=328 respondents, representing approximately 9% of the SEEDA ESF participant population, agreed to participate in the two periods of telephone interviews. The sample of participants is representative of the five ESF SEEDA project clusters as described in Table 4.1.

The average age and gender distribution of the sample are also presented in Table 4.1. No data are available to determine whether these data are consistent with the population of participants. The majority of participants in the whole sample – around two thirds – were male. However, the gender distribution varied across the five clusters. In Cluster-1 **Equal Opportunities** nearly 80% of the participants were female; whereas in Cluster-4 **Regional Resource Centres** over 85% of the participants were male. More even gender distributions were evident in Cluster-2 **Leadership and Management** and Cluster-3 **Social Enterprise**. Cluster-5 **Business Growth** mapped very closely with the whole sample distribution.

**Table 4.1: Age and Gender of the Training Participants: Whole Sample and by Project Cluster**

	<b>Whole Sample</b>	<b>Equal Opportunities</b>	<b>Leadership and Management</b>	<b>Social Enterprise</b>	<b>Regional Resource Centres</b>	<b>Business Growth</b>
		<i>Cluster-1</i>	<i>Cluster-2</i>	<i>Cluster-3</i>	<i>Cluster-4</i>	<i>Cluster-5</i>
<b>No. of Respondents</b>	328	23	132	51	61	61
<b>Percentage of Sample</b>	100	7	40	15	19	19
<b>Average Age (±SD) years</b>	42.5 (±12.6)	45.6 (±10.5)	43.3 (±9.8)	44.9 (±13.0)	38.51 (±13.9)	41.7 (±10.4)
<b>Gender</b>						
Male (%)	67.0	21.7	51.5	54.9	86.9	67.2
Female (%)	33	78.3	48.5	45.1	13.1	32.8

The employment status of the participants in the sample is presented in Figure 4.1. The majority of participants were in full-time employment, with self-employed workers representing the second largest group, followed by those in part-time employment. Unemployed participants combined with “not known/missing data” made up less than 5.0% of the whole sample. Table 4.2 presents the employment status by project cluster. The distribution for Clusters 1, 2 and 3 maps fairly well with the whole sample; however, over 90% of **Regional Resource Centres** and **Business Growth** participants were in full-time employment.

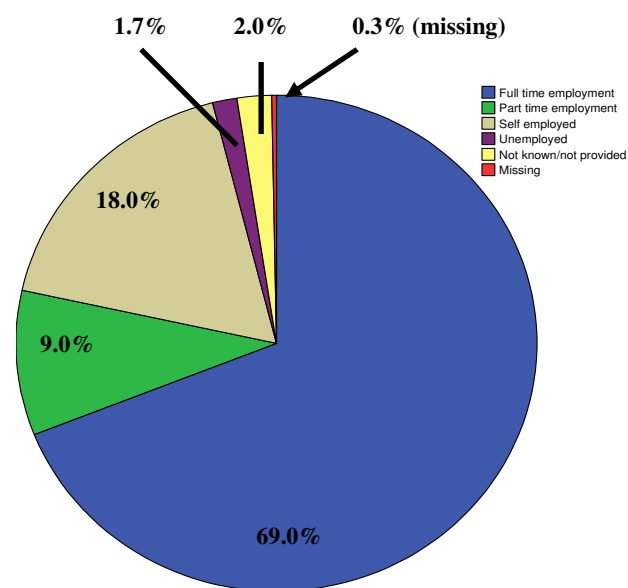


Figure 4.1: Employment Status of the Whole Sample

Table 4.2: Employment Status: By Project Cluster

	Equal Opportunities (n=23)	Leadership and Management (n=132)	Social Enterprise (n=51)	Regional Resource Centres (n=61)	Business Growth (n=61)
Full-Time Employment	57%	50%	66%	93%	93%
Part-time Employment	13%	14%	10%	2%	5%
Self-Employed	13%	33%	18%	5%	2%
Unemployed	0%	2%	2%	0%	0%
Not Known/Not Provided	17%	1%	4%	0%	0%

## 4.4.2 Organisation of the Opportunity/Activity

### Starting out

The majority of participants found out about the opportunity from their manager (45%); relatively few were made aware of these opportunities from the employer's human resources department (5%), reflecting the smaller size of organisations participating. A number of participants learned of their particular activity either from an external (training/education) agency (10%) or through advertisement (10%), and 30% from some "other" source. The main type of activity undertaken by the participants provided specific theory and/or knowledge directly related to the participants' job (52%), whilst specific, practical training opportunities had the lowest participation from this research sample (5%). Only one in four participants did not know their training was supported by ESF, which compares favourably to the Department of Work and Pensions ESF Objective 3 2005 Beneficiary Survey which found that nationally only 56% were aware that activity had been supported by ESF.

### Describing the activity – programming

The majority of participants were involved in opportunities and/or activities on a part-time basis, which were generally programmed to run during the working day (Figure 4.2). This pattern of activity programming is further emphasised when an analysis is undertaken by project cluster (Table 4.3).

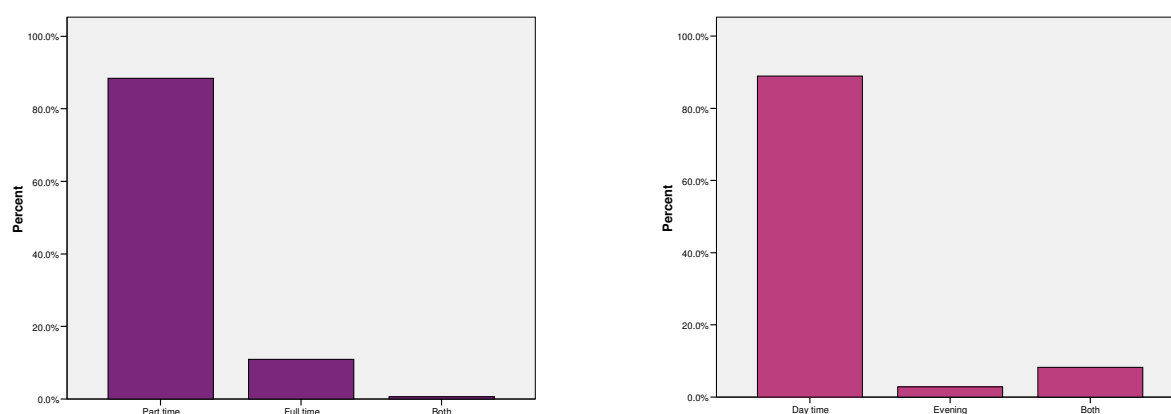


Figure 4.2: Describing the Activity – Programming: Whole Sample

Table 4.3: Describing the Activity – Programming: by Project Cluster

	Equal Opportunities (n=23)	Leadership and Management (n=132)	Social Enterprise (n=51)	Regional Resource Centres (n=61)	Business Growth (n=61)
<b>Pattern of Provision:</b>					
Full-Time	26%	4%	18%	10%	15%
Part-time	74%	94%	82%	90%	85%
Both	–	2%	–	–	–
<b>Scheduling of Provision:</b>					
Day-time	100%	75%	84%	100%	97%
Evening	–	7%	4%	–	3%
Both	–	18%	12%	–	–

### Describing the activity – organisation

Figure 4.3 illustrates the organisation of the opportunities. In the whole sample, the majority of opportunities were provided as “group” activities, which in the main were delivered as “one off” events. This was also true if the organisation of the activities is considered by project cluster (Table 4.4). However, it is worthy of note that there is also diversity of delivery, which intuitively should reflect the varied outcomes required of the different project clusters. Such diversity of delivery should be commended and indeed should be encouraged both within as well as across project clusters.

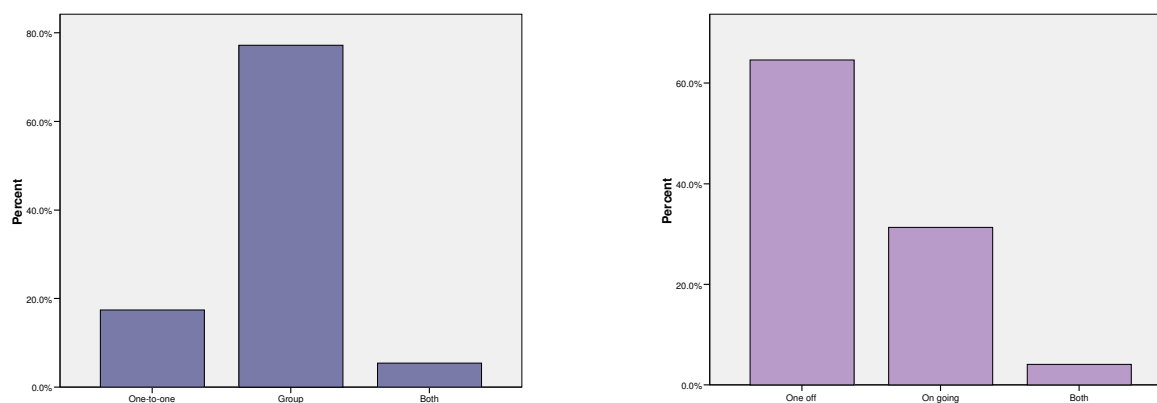


Figure 4.3: Describing the Activity – Organisation: Whole Sample

Table 4.4: Describing the Activity – Organisation: by Project Cluster

	Equal Opportunities (n=23)	Leadership and Management (n=132)	Social Enterprise (n=51)	Regional Resource Centres (n=61)	Business Growth (n=61)
One-to-One	4%	33%	8%	3%	8%
Group	96%	51%	77%	97%	92%
Both	–	8%	14%	–	–
Missing data	–	8%	5%	–	–
One-off	100%	46%	61%	75%	71%
Ongoing	–	38%	33%	25%	30%
Both	–	8%	6%	–	–
Missing data	–	8%	–	–	–

### Training objectives

The participants were asked to identify the priority (on a 1 to 4 point scale, where 1 indicated LOW priority and 4 indicated HIGH priority) they had given to a series of possible objectives with reference to their particular opportunity. The objectives have been listed in Table 4.5 along with the priority afforded to each objective by the participants. This prioritisation has been considered both from the whole sample and from the project clusters perspective.

**Table 4.5: The Participants' Prioritisation of a Number of Objectives: Whole Sample and by Project Cluster**

Training Objective	Whole Sample (n=328)	Equal Opportunities (n=23)	Leadership and Management (n=132)	Social Enterprise (n=51)	Regional Resource Centres (n=61)	Business Growth (n=61)
i. To aid defining/re-defining the organisation	Moderate	Neutral	Moderate	High	Neutral	Moderate
ii. To facilitate the organisation's strategic plan	Moderate	Neutral	Moderate	High	Neutral	Moderate
iii. To change direction of the organisation	Moderate	Moderate	Moderate	Moderate	High	Moderate
iv. To provide skills/qualifications to do the job	High	Moderate	Moderate	High	High	Moderate
v. To improve on your existing skills	High	High	Moderate	High	High	Moderate
vi. To provide you with skills for a future job/role	High	High	High	High	High	High
vii. To address skills shortages/recruitment problems	Neutral	High	Neutral	Moderate	Neutral	Neutral
viii. To improve staff morale and reduce staff turnover	Neutral	Moderate	Neutral	Neutral	Neutral	High
ix. To meet legal obligations	Neutral	Neutral	Neutral	Neutral	Neutral	Neutral
x. To improve the organisation's competitiveness	Moderate	Neutral	Neutral	Moderate	High	Moderate
xi. To help develop new ideas for business	High	High	High	High	Moderate	High
xii. To generate more innovation within the company	High	Moderate	Low	High	High	High

In terms of the participants' high priority objectives – from a whole sample perspective – these included “aiding defining/re-defining the organisation”, “improving your existing skills”, “providing [the beneficiary] with skills for a future job/role”, “developing new ideas for business”, and “generating more innovation within the company”. Generally, the more innovative and expansive objectives were prioritised, whilst more defensive objectives received less priority.

When the participants' priorities were reviewed by project cluster, generally a similar pattern is evident except for Cluster-3, the **Social Enterprise** cluster, and perhaps less so for Cluster-4 the **Regional Resource Centres** cluster. Participants in the **Social Enterprise** cluster rated more of the objectives as *high priority*.

Participants were asked if they wished to make further comment with reference to what were considered to be the objectives of the opportunity and/or activity. The participants' comments suggested that was associated with general development within individuals:

*“It was hard but worth it”*

*“It was an excellent study day and has made a lot of difference to my work”*

*“The course gave me confidence, and definition and a clearer idea of working”*

Whilst also instilling specific business skills:

*“I thought it was all good and worth going, has taught me a lot about engineering”*

*“I was well instructed and have been able to use the links I make there to great advantage for my organisation”*

*“Some of the stuff we learnt has been very good, especially time management”*

Activity was also associated with improvements in the workplace:

*“For me personally it was fantastic, it was really good, one of the Directors of the Company had been and thought it would be a good thing for me to do”*

*“It has given me different ways of staffing and staff solutions, being more creative in dealing with difficult staff. It has certainly improved my listening skills”*

Whilst the patterns of prioritisation were *generally* similar between project clusters, there were noteworthy disparate views relating to the same event within a project cluster. This finding perhaps reflects the different motives of participants for attending an activity, or indeed different expectations of the event and whether it had achieved the stated objectives.

#### **ESF activity: goal setting and outcomes**

The participants were further asked to identify their agreement (on a 1 to 4 point scale, where 1 indicated STRONGLY DISAGREE and 4 indicated STRONGLY AGREE) with reference to a series of statements about goal setting and outcomes of the activity. The statements are listed in Table 4.6 for the whole sample and by project cluster, together with the level of agreement reported by the participants.

**Table 4.6: Goal Setting and Activity Outcomes: Whole Sample and by Project Cluster**

Statement	Whole Sample (n=328)	Equal Opportunities (n=23)	Leadership and Management (n=132)	Social Enterprise (n=51)	Regional Resource Centres (n=61)	Business Growth (n=61)
i. The objectives were clear at the start	Strongly Agree	Strongly Agree	Strongly Agree	Strongly Agree	Strongly Agree	Strongly Agree
ii. You knew what you wanted to achieve from the activity	Strongly Agree	Strongly Agree	Strongly Agree	Strongly Agree	Strongly Agree	Strongly Agree
iii. The activity met the needs of the organisation	Strongly Agree	Strongly Agree	Strongly Agree	Strongly Agree	Strongly Agree	Strongly Agree
iv. Your performance targets of the activity's outcomes were clearly established at the outset	Strongly Agree	Strongly Agree	Strongly Agree	Strongly Agree	Strongly Agree	Strongly Agree
v. If so, these performance targets were achieved through the activity	Strongly Agree	Strongly Agree	Agree	Strongly Agree	Strongly Agree	Strongly Agree
vi. Your performance targets of the activity's outcome were appropriate and realistic	Strongly Agree	Strongly Agree	Strongly Agree	Strongly Agree	Strongly Agree	Strongly Agree
vii. This activity has led to new or other activities being identified/needed	Agree	Strongly Agree	Strongly Agree	Agree	Agree	Strongly Agree
viii. The activity clearly met your needs/expectations	Strongly Agree	Strongly Agree	Strongly Agree	Agree	Strongly Agree	Strongly Agree
ix. The activity has enhanced your performance in the organisation	Strongly Agree	Strongly Agree	Strongly Agree	Strongly Agree	Agree	Strongly Agree
x. There were barriers to participation	Strongly Disagree	Strongly Disagree	Strongly Disagree	Strongly Disagree	Strongly Disagree	Strongly Disagree
xi. If so, the barriers were addressed effectively	Not Applicable	Agree	Not Applicable	Not Applicable	Strongly Agree	Not Applicable
xii. The activity has impacted on you outside of the workplace	Strongly Disagree	Agree	Strongly Disagree	Strongly Disagree	Strongly Disagree	Strongly Disagree

From Table 4.6, it is evident that the participants considered the opportunities and/or activities to be well defined at the outset, meeting both the needs and/or expectations of the beneficiary and the organisation. There did not appear to be any barriers to participation of the participants in the opportunities and/or activities, and this was a unanimous observation across the five project clusters. Of note, the activity did not appear to impact upon the participants outside of the workplace. This observation may reflect the specificity of the event to the workplace; or alternatively, given the content of statements (x) and (xi) in Table 4.6, an unforeseen interpretation of this question by the participants may have been in terms of a possible “adverse” impact.

When asked to make further comment with reference to goal setting and outcomes, generally the views were positive:

*“Extremely useful to us as a company”*

*“Extremely good workshop really worthwhile”*

*“...I was worried about going on the course because I left school unable to read or write but it has turned out all right”*

Though some participants had less positive experiences:

*“It is good but sometimes we feel a bit rushed”*

Nevertheless, the intended approach and learning outcome were, in the main, viewed as appropriate:

*“I was very pleased with the interest shown by all the staff who took part in this course and it has made a tremendous difference to our working attitudes – look forward to the next series of Projects”*

*“The people who delivered the course were very knowledgeable and helpful”*

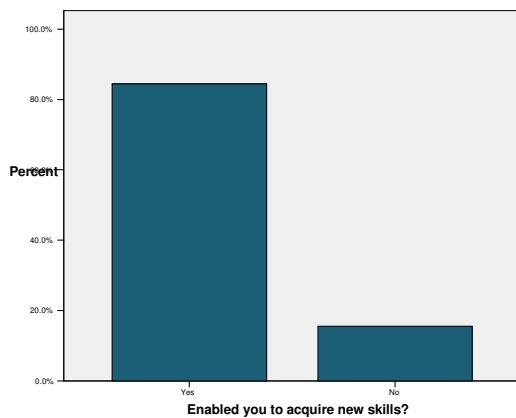
### **The participants’ views, attitudes and understandings following completion of their activity**

The feelings and perceptions of the participants were ascertained with reference to their particular opportunity and/or activity.

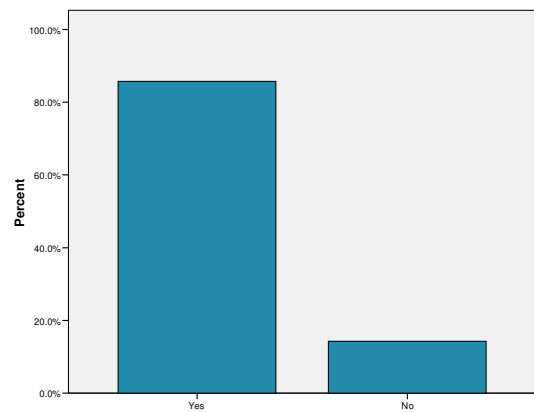
Figure 4.4 presents the feelings and perceptions of the whole sample participants, specifically with reference to how they were affected by the activity. In Table 4.7 these feelings have been reviewed by project cluster. Generally, the activity was thought to have had a positive effect, being associated with acquiring new skills, new ways of thinking, improved confidence, a more positive morale, and improved employment prospects. However, these benefits were associated with the participants’ work life (within the participants’ *present* organisation at the time of the interview), and were viewed to have had less of an impact on their life outside of the organisation. There was general agreement on the participants’ views, attitudes and understandings following completion of their activity when these were analysed by project cluster (Table 4.7).

Figure 4.5 presents the feelings and perceptions with reference to how the activity had affected the participants and their activities *within* the organisation. In Table 4.8 these perceptions have been reviewed by project cluster. The activity was generally viewed as having increased the commitment of the participants to the organisation and had instilled a stronger sense of purpose, improved productivity and/or performance, and enabled participants to develop new products and/or improve processes and/or make the business more efficient. However, the participants did not feel that the opportunity had improved their position or prospects within the company. Of note, whilst it is understandable that participants in Cluster-1 **Equal Opportunities** may not feel that the activity had “*Enabled [them] to develop new products/improve processes/make the business more efficient?*”, it would not be unreasonable to speculate that this would have been an objective for Cluster-4 **Regional Resource**

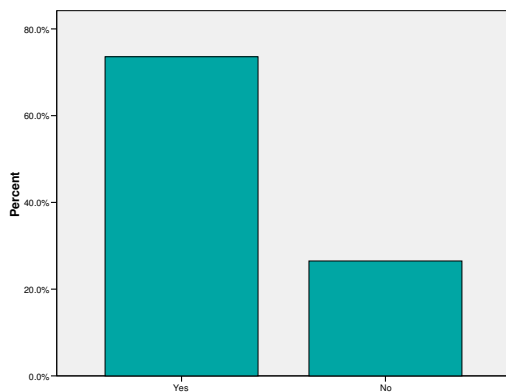
**Centres.** The prevailing response from both these project clusters was negative with regards to this statement, whilst the other project clusters generally provided a positive response.



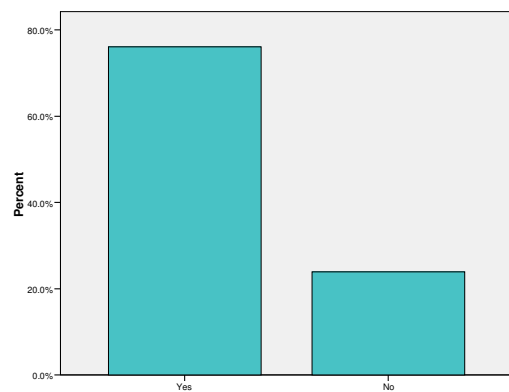
“Enabled you to acquire new skills?”



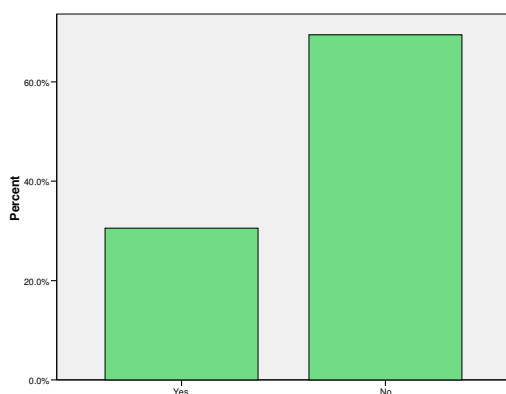
“Enabled you to acquire new ways of thinking?”



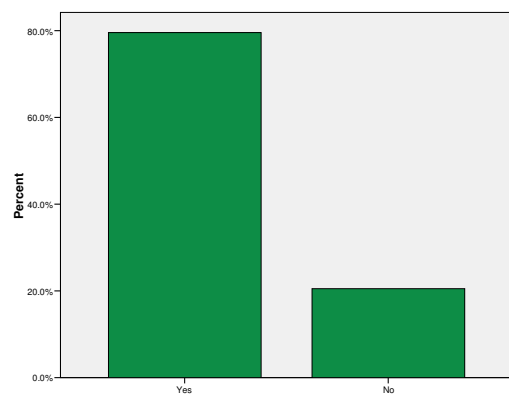
“Improved your confidence in general?”



“Contributed to a more positive morale?”



“Impacted on your life outside of the organisation?”

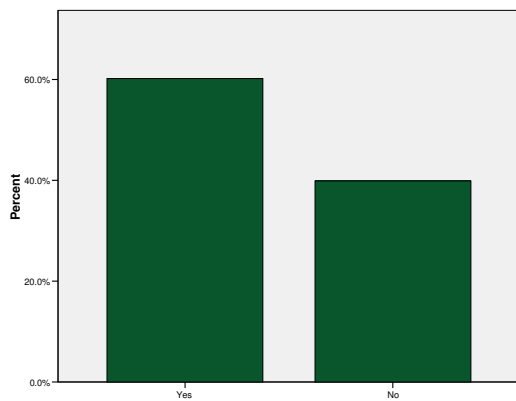


“Improved your employment prospects generally?”

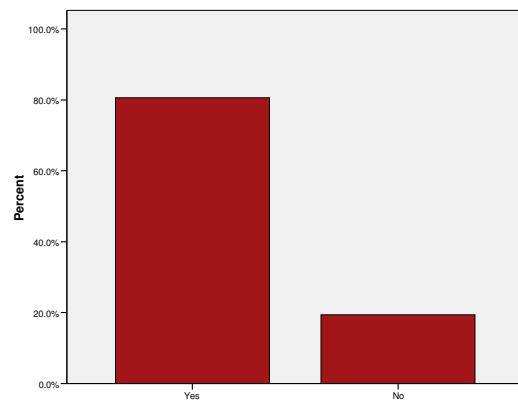
**Figure 4.4: Feelings about the Activity – Changes in You: Whole Sample**

Table 4.7: Feelings about the Activity – Changes in You: by Project Cluster

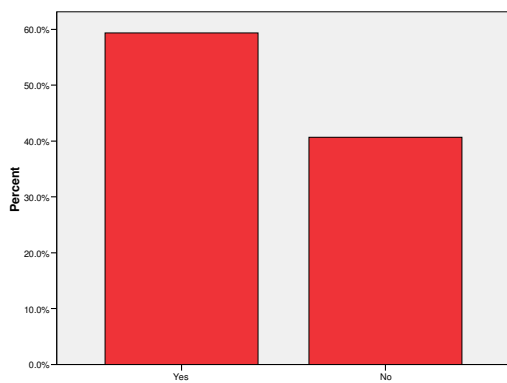
Statement	Equal Opportunities (n=23)	Leadership and Management (n=132)	Social Enterprise (n=51)	Regional Resource Centres (n=61)	Business Growth (n=61)
i. "Enabled you to acquire new skills?"	Yes	Yes	Yes	Yes	Yes
ii. "Enabled you to acquire new ways of thinking?"	Yes	Yes	Yes	Yes	Yes
iii. "Improved your confidence in general?"	Yes	Yes	Yes	Yes	Yes
iv. "Contributed to a more positive morale?"	Yes	Yes	Yes	Yes	Yes
v. "Impacted on your life outside of the organisation?"	No	No	No	No	No
vi. "Improved your employment prospects generally?"	No	No	No	No	No



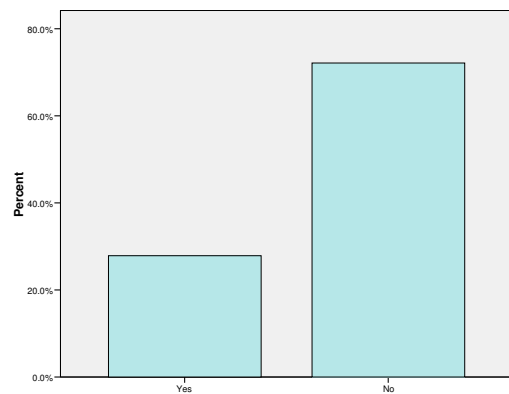
“Increased your commitment to the organisation and job?”



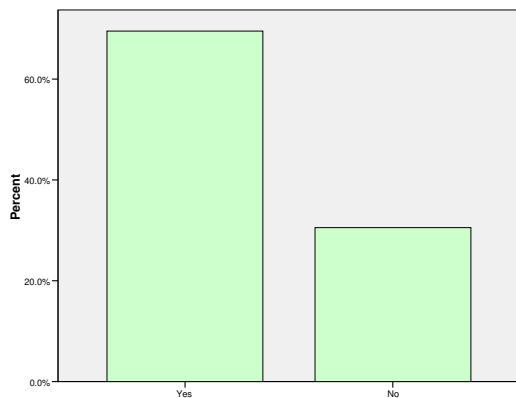
“Improved your productivity/performance in your job?”



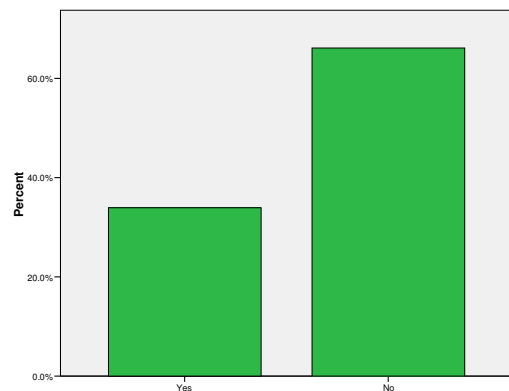
“Enabled you to develop new products/improve processes/make the business more efficient?”



“Improved your position within the organisation?”



“Did it help reinforce a stronger sense of purpose within your workplace?”



“Improved your prospects within the organisation?”

**Figure 4.5: Feelings about the Training Opportunity – You and the Company/Organisation: Whole Sample**

**Table 4.8: Feelings about the Activity – You and the Company/Organisation: by Project Cluster**

<b>Statement</b>	<b>Equal Opportunities (n=23)</b>	<b>Leadership and Management (n=132)</b>	<b>Social Enterprise (n=51)</b>	<b>Regional Resource Centres (n=61)</b>	<b>Business Growth (n=61)</b>
i. "Increased your commitment to the organisation and job?"	Yes	Yes	Yes	Yes	Yes
ii. "Improved your productivity/performance in your job?"	Yes	Yes	Yes	Yes	Yes
iii. "Enabled you to develop new products/improve processes/make the business more efficient?"	No	Yes	Yes	No	Yes
iv. "Improved your position within the organisation?"	No	No	No	No	No
v. "Did it help reinforce a stronger sense of purpose within your workplace?"	Yes	Yes	Yes	Yes	Yes
vi. "Improved your prospects within the organisation?"	Yes	Yes	Yes	Yes	Yes

Figure 4.6 presents the feelings and perceptions of the whole sample of participants specifically with reference to how they felt the organisation was affected by their having undertaken the opportunity and/or activity. In Table 4.9 these feelings and perceptions are reviewed by project cluster. The participants felt that their training had “Improved [the] organisation’s attitude to learning in the workplace”, and there was a generally strong feeling that their participation would benefit the organisation’s customers. This pattern of response was also observed when these statements were analysed by project cluster.

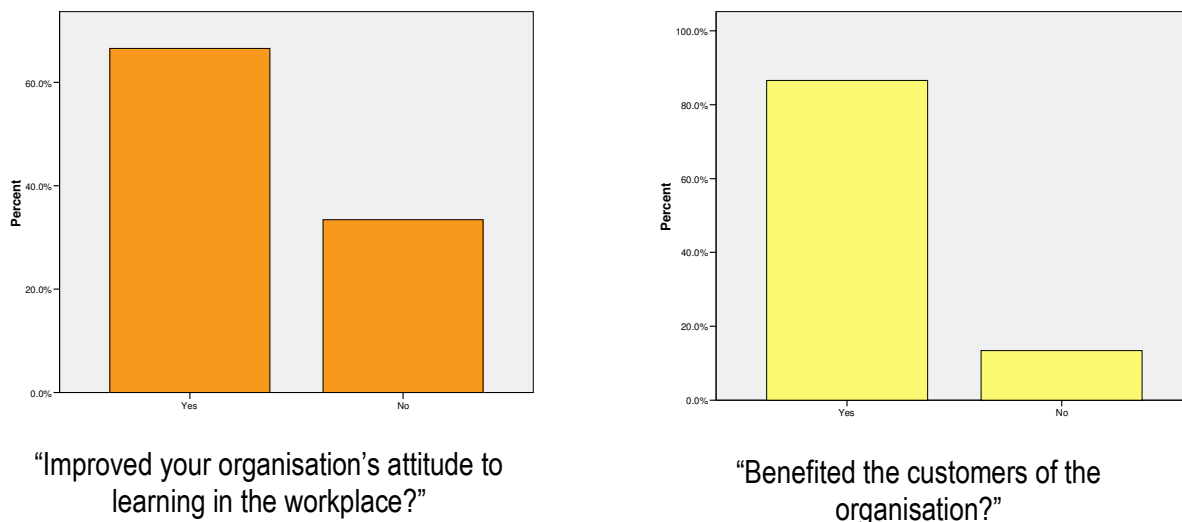


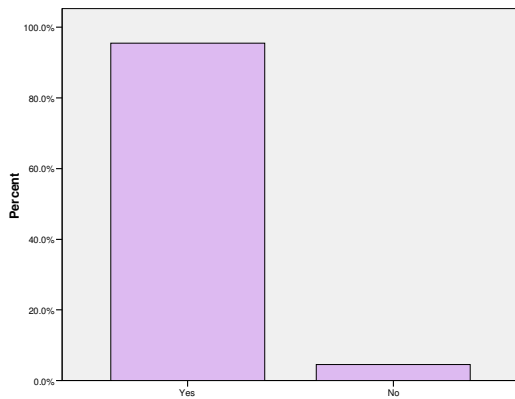
Figure 4.6: Feelings about the Activity – The Company/Organisation: Whole Sample

	Equal Opportunities (n=23)	Leadership and Management (n=132)	Social Enterprise (n=51)	Regional Resource Centres (n=61)	Business Growth (n=61)
"Improved your organisation's attitude to learning in the workplace?"	Yes	Yes	Yes	Yes	Yes
"Benefited the customers of the organisation?"	Yes	Yes	Yes	Yes	Yes

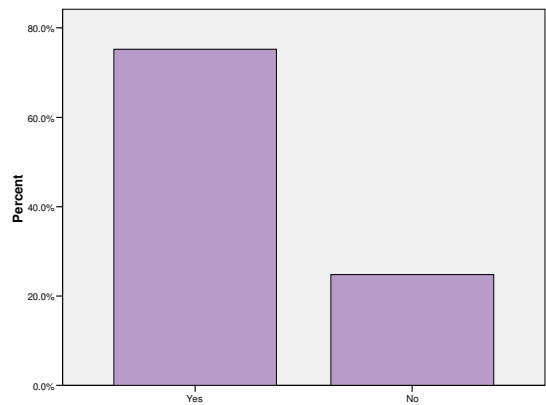
Table 4.9: Feelings about the Training Opportunity – The Company/Organisation: by Project Cluster

## 4.5 The Activity

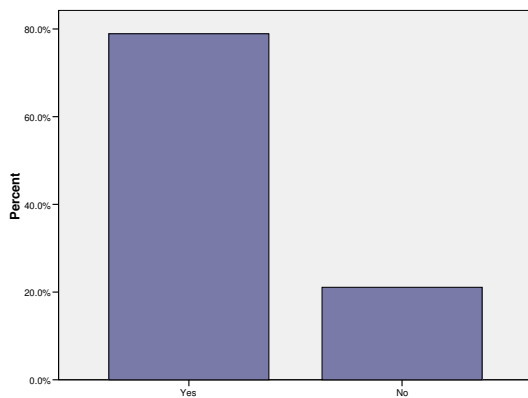
The participants' evaluative thoughts on the opportunity and/or activity in which they had participated are presented in Figure 4.7 (overleaf) for all participants, and broken down by project cluster in Table 4.10.



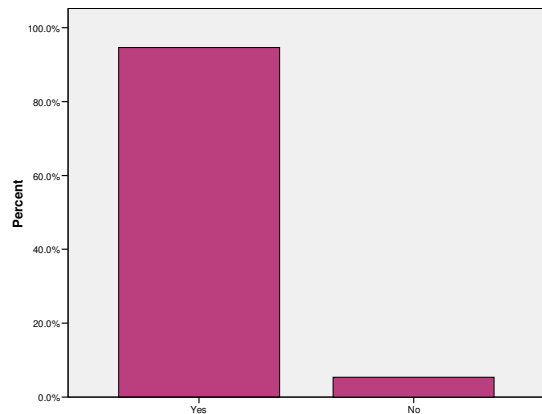
“Do you feel the activity was the right approach to take?”



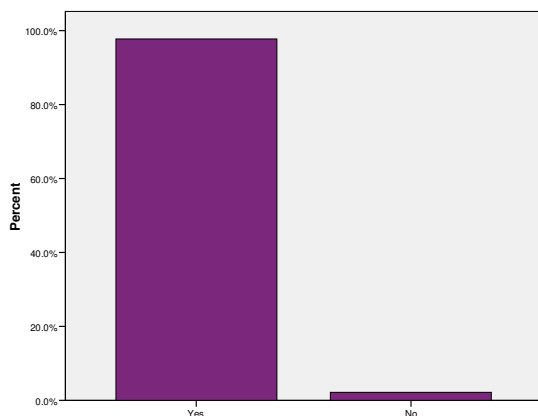
“If not, are you aware of other opportunities that may be more ‘in tune’ with your organisation’s needs?”



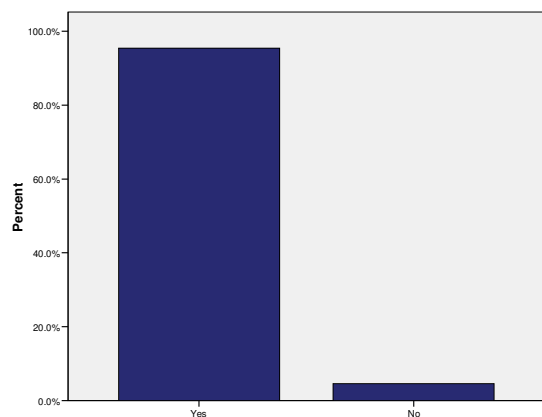
“Had this opportunity not been available are you aware that there was a comparable opportunity available elsewhere?”



“Would you have participated in this?”



“Would you recommend the activity to others?”



“Was the activity viewed favourably by your employer/organisation?”

**Table 4.10: Feelings about the Activity – You and the Company/Organisation: by Project Cluster**

<b>Statement</b>	<b>Equal Opportunities (n=23)</b>	<b>Leadership and Management (n=132)</b>	<b>Social Enterprise (n=51)</b>	<b>Regional Resource Centres (n=61)</b>	<b>Business Growth (n=61)</b>
i. "Do you feel the activity was the right approach to take?"	Yes	Yes	Yes	Yes	Yes
ii. "If not, are you aware of other opportunities that may be more 'in tune' with your organisation's needs?"	Yes	Yes	Yes	Yes	Yes
iii. "Had this opportunity not been available are you aware that there was a comparable opportunity available elsewhere?"	Yes	Yes	Yes	Yes	Yes
iv. "Would you have participated in this?"	Yes	Yes	Yes	Yes	Yes
v. "Would you recommend the activity to others?"	Yes	Yes	Yes	Yes	Yes
vi. "Was the activity viewed favourable by your employer/organisation?"	Yes	Yes	Yes	Yes	Yes

The activities that had been undertaken were generally viewed to have been the “...right approach to take”. The participants were aware of “other opportunities” that were available and might have been viewed as more “in tune” with the organisation’s needs, and they felt strongly that they would have participated in such opportunities. Nevertheless, the participants would recommend the activity in which they had participated to others, and the overwhelming opinion was that the activity had been viewed favourably by their employer/organisation. This pattern of response was also observed when these statements were analysed by project cluster.

## 4.6 Conclusions

The conclusions that can be drawn from the telephone survey are:

- One in four participants were aware that their training opportunity and/or activity had been funded by the ESF.
- The opportunities and/or activities were considered to be relevant to the participants' current employment, and met specific occupational requirements.
- The events were generally considered to be well organised with clearly identified objectives and well-defined outcomes.
- The participants felt that the activity had specifically enhanced their performance in their current post...
- And some felt they were better prepared for a future post or role.
- However, the participants were less clear with regard to whether the activity had afforded any general benefits outside of their current role or workplace.
- There were subtle differences in the pattern of response when analyses of the whole sample of participants' questionnaire responses were considered by project cluster.
- However, these project cluster differences, in the main, were not considered to be significant, and were considered to reflect differences in activity rather than concerns over provision.

## 5. Overall Conclusions

### The ESF Activity

- Participants report that the activities were relevant to their employment, met occupational requirements and were well organised with clearly identified objectives and well-defined outcomes. They comment that participation resulted in an enhancement in their performance in their job, and, for many, better preparation for a future role. Activity has clearly made a significant impact throughout the South East.

### The importance of good project management

- For successful projects (i.e. those that achieved their goals and had clear observable positive impact), the two most important factors seem to be:
  - The presence of a project manager who is able to be committed and passionate about the project, has the skills for effective organisation in terms of systems, administration and management of paperwork, and understands the need for establishing clear eligibility at an early stage.
  - The enthusiasm and skill to tailor the “offer” to meet the needs of employers, and to deliver this in bite-sized chunks at a time, pace and place to suit. Successful projects “listen” well to employers, and are also able to act as “advisors” particularly to smaller organisations, many of whom are unsure of the skills that could give them the competitive edge. These employers would not participate without the support of a credible and committed advisor.

### The value of personal contact

- It has been noticeable how much can be learned by participants from personal contact. This was evident in both the mentoring and action learning set projects, and in the extent to which businesses learned from each other (rather than from “training” style input in some cases).

### The importance of rigorous assessment of the actual need for a project

- Alongside this, the need has been demonstrated for a clear sense of both the realistic requirement for a particular intervention before launching a project, and of the market for this intervention. Much has been learned about the effectiveness of networking methods of marketing a project, as opposed to the more anonymous approaches to marketing, such as mailshots.

### ESF awareness

- Projects need to ensure all participants are aware that their activity has been funded by ESF; a sizeable proportion of research participants were unaware that project funding was derived from the ESF.

### Sustainability

- There are number of factors that influence the sustainability potential of projects, including the extent to which projects are able to link to wider initiatives, and the extent to which the activity is perceived by employers to offer them something that will affect their bottom line. These projects are then in a good position to start charging commercial rates. ESF has provided the momentum and good practice knowledge to help these projects continue. This is good news for them. Other projects such as *Diversity Means Business* struggled to achieve widespread sustainability as employers simply do not on the whole recognise diversity as a priority. Commercialisation of this type of activity is not a viable option. Further investigation is needed to assess how to grow the successful projects which have clear links to the RES when employers will not pay for the services provided.

### **Legacy**

- ESF Programme 2004–2007 will have a lasting legacy. This is shown not solely through the continuation of many projects, but also through the continuing influence of what has been learned and understood. For example, mentors once trained will be able to continue to apply their mentoring skills, those attending action learning sets will continue to make use of what was learnt during their sessions, and those that took part in the lean programmes will continue to apply lean practice to their organisation. Legacy is also shown through the influence projects are having on other initiatives, and the establishment of new projects based on models developed by ESF activity. The challenge now is to ensure that the body of knowledge held in terms of lessons learnt and good practice is not lost, and that it is applied to future projects at the earliest stage.

### **Improved quality of evaluation reporting**

- The quality of the evaluation reports from projects has improved significantly from earlier ESF Rounds. It is now easier to establish the success of projects, their impact and outcomes and their legacy, although there is still further work to be done. Having a clear statement at the start of a project about its desired outcomes and impact, and how they will specifically be recognised, is very helpful in moving this forward. A recommendation has been made to consider the extent to which it would be possible to attach funding to the achievement of impacts.

### **More to be learned**

- There is still more to be learned about the appropriate geographical reach of any project, as well as ongoing discussions about genuine equality of access.