

# Evaluation of the Core Skills Development Partnership

Part 2 - Value for Money & Lessons learned

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Prepared by Andrew Harrison  
GFA Consulting  
Midlands Office  
121 Trafalgar Rd  
Birmingham  
B13 8BT

[andrew.harrison@gfa.co.uk](mailto:andrew.harrison@gfa.co.uk)

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## **Background to the study**

This is part 2 of a 3 part evaluation study. The first part was completed in 2001 as an assessment of the then 3<sup>rd</sup> party evaluations that had been done. The third part is in the form of a 'how to kit' and guide to outcome related planning – providing some guidance on how to be an 'intelligent organisation' (as explained on the Core Skills Development Partnership (CSDP) www site.<sup>1</sup>).

This, second part contains an assessment of the value for money (vfm) of the CSDP, and a synthesis of the main lessons learnt from the experience of the past seven years' activity.

The history of the partnership has been recently told by its co-ordinator, Geoff Bateson, and can be heard from the www site<sup>2</sup>. In the narrative of 'Moving the Mountains', Geoff

- Outlines key events in the development of the CSDP
- Reflects on the progress to the current position
- Looks back on the past 7 years, and
- Looks forward to the next 7 – 10 years

## **Objectives and method**

The objectives and method for the evaluation are summarised in the appendices (as part of the topic guide). Essentially the purpose was to

- Assess VFM
- Document lessons that had been learnt
- Gather evidence on what the 'business processes' within the CSDP had been which helped to explain its VFM
- Provide examples of the types of 'tools' and techniques that had been used in practice to help support the implementation of the 'business processes'

The work was carried out during a period from January – July 2003.

## **Structure of part 2**

This part of the evaluation study is based around seven main sections. These are:

<b>Section of report</b>	<b>Detail</b>

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<sup>1</sup> <http://www.coreskills.co.uk/activities/whatwewknow/intelligentorg.html>

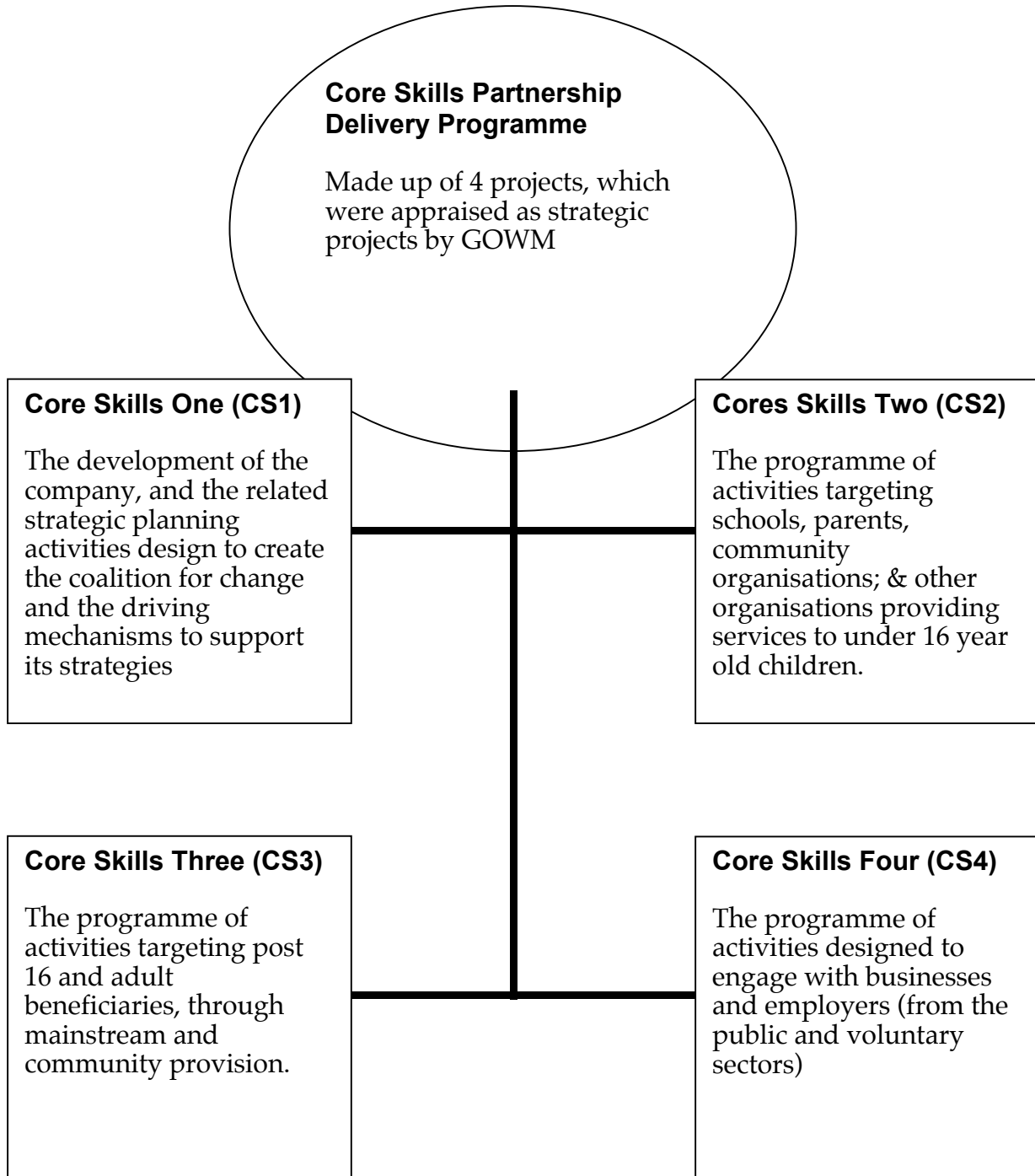
<sup>2</sup> <http://www.coreskills.co.uk/audio/index.html>

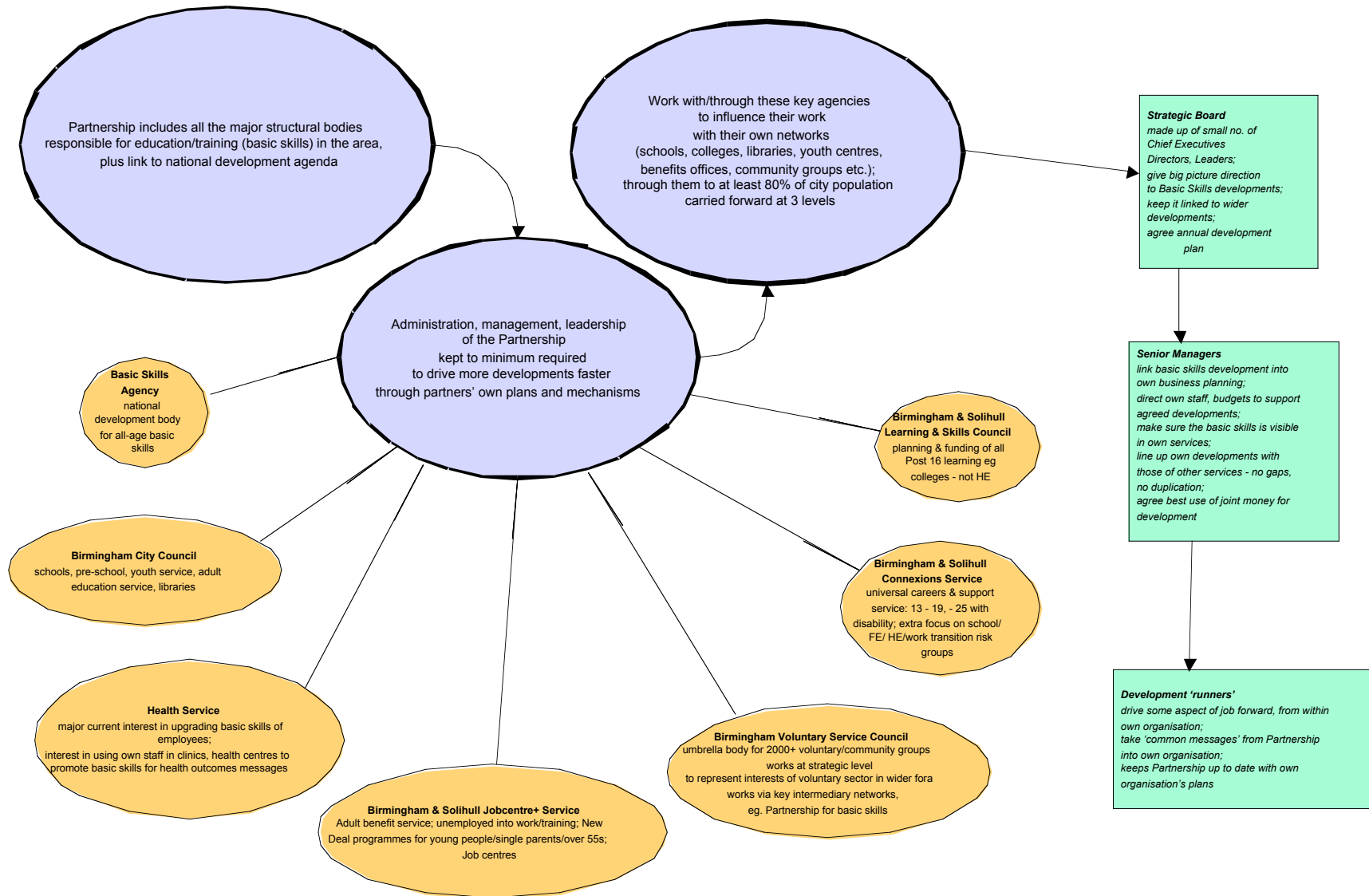
<b>Section of report</b>	<b>Detail</b>
Background to the study	<ul style="list-style-type: none"> <li>- Objectives</li> <li>- Structure of report</li> <li>- Programme structure</li> </ul>
Executive Summary	<ul style="list-style-type: none"> <li>- Summary of the key lessons and achievements</li> </ul>
Partners' assessment	<ul style="list-style-type: none"> <li>- Health of CSDP</li> <li>- Distinctive characteristics</li> <li>- Achievements</li> <li>- Lasting impact</li> <li>- Experience of strategy &amp; business planning processes</li> </ul>
Activity managers assessment	<ul style="list-style-type: none"> <li>- Efficiency and effectiveness of the CSDP</li> <li>- Experience of activity development &amp; management</li> </ul>
Systems' assessment	<ul style="list-style-type: none"> <li>- Description and comment on systems used within CSDP</li> <li>- Governance, development, planning, and evaluation</li> </ul>
VFM assessment <sup>3</sup>	<ul style="list-style-type: none"> <li>- Assessment of the vfm of the strategic projects</li> <li>- Core Cities' comparators</li> <li>- Overall outputs and spend</li> </ul>
Appendices	<ul style="list-style-type: none"> <li>- Interviewees</li> <li>- Topic guide</li> <li>- Vfm policy</li> <li>- Notes on analysis of comparators</li> <li>- Timeline for the CSDP</li> </ul>

<sup>3</sup> Based on the CSDP value for money policy, reproduced in the Appendices

## Programme structure

The programme for the Core Skills Development Partnership was structured around 4 strategic projects. These are the projects in Single regeneration Budget (SRB) terms that were appraised and approved by the Government Office (GOWM).





## Executive Summary

The Executive Summary describes the headline findings, in terms of achievements and lessons.

### Achievements

*“Uniquely in Birmingham in my experience, the partnership actually set its own agenda. The partnership was therefore able to maintain ownership of its own strategy and priorities, in spite of its reliance on SRB funding.”*

Headline Finding:	<b>The CSDP has represented very good value for money</b>
Evidence summary	<ul style="list-style-type: none"> <li>- Scale of outputs</li> <li>- Net cost per unit of output</li> <li>- Process benefits, and related development of capacity</li> <li>- Strategic fit</li> <li>- Contribution to understanding the baseline, and related strategic issues</li> <li>- Minimal waste in the business processes for the partnership</li> <li>- Relative costs of administration and management, both low</li> </ul>

*“The decision to work through strategic partners was genuinely developmental. At the inception of the partnership, there were counter pressures – to spend, to view the CSDP as “non core business”, to carve up the cake.”*

Headline Finding:	<b>The CSDP has had a lasting impact on the systems for the provision of core and basic skills training &amp; education</b>
Evidence summary	<ul style="list-style-type: none"> <li>- Contribution to the improvements in the baseline</li> <li>- The scale of change in the baseline <i>and</i> the pace of change</li> <li>- The increasingly cross-sectoral and inter agency focus</li> <li>- Investment directly in the voluntary and community sector so that it could develop systems around core and basic skills</li> <li>- Shaping the use of the standards' fund, and complementing its priorities</li> <li>- Enabling, not delivering</li> <li>- The organisation of the CSDP was designed to change systems. It was not a legal entity for any other reason.</li> </ul>

*“We avoided the institutional politics of “traditional” SRB schemes. Rather than that we developed an in built leverage model, under which the priorities for the investment of the CSDP funds were overwhelmingly developmental. Not only did*

*this mean that there were few disputes about additionality – we only wanted to add value. It also meant that the involvement of partners and activity managers was incentivised. The CSDP resources meant that they were better equipped to get the best out of their own resources.”*

Headline Finding:	<b>The CSDP has been a working model for the development and demonstration of how to plan and deliver lasting change in public services</b>
Evidence summary	<ul style="list-style-type: none"> <li>- Start with a plan and then find the money</li> <li>- scale of investment in infrastructure</li> <li>- scale of investment in professional practice development</li> <li>- embedding of core and basic skills in partners' strategies and service plans</li> <li>- establishing and maintaining the focus on development investment, rather than simply funding more activity</li> <li>- development of the business planning and activity design processes</li> <li>- embedded policy priority of core &amp; basic skills in all of the partners' delivery systems</li> <li>- Augmenting the professional practices of front line staff</li> </ul>

*“In every Area Based Initiative in the City so far, funding has become the story, even if it was not the story at the outset. In the CSDP the opportunity for system-wide change was the story that prevailed.”*

Headline Finding:	<b>The CSDP has raised the game and set the pace of change</b>
Evidence summary	<ul style="list-style-type: none"> <li>- Commitment to rational but stretching goals in achieving outcomes</li> <li>- The process of setting targets and reviewing progress in themselves</li> <li>- Self belief in the importance and urgency of achieving goals</li> <li>- Credible capacity to influence national policy developments</li> <li>- <u>Only</u> added value</li> </ul>

## Lessons

*“There was structural facilitation early on in the process....there were no competing visions at the outset...mainly because the board members provided perspective and functional leadership, rather than represented established interests. The fact that core and basic skills was no one’s statutory responsibility helped enormously with this process.”*

Headline Finding:	<b>Strategic leadership and strategic facilitation have been critically important</b>
Evidence summary	<ul style="list-style-type: none"> <li>- Clout</li> <li>- Consistency and seniority of leadership</li> <li>- Commitment to lead, rather than simply manage the programme</li> <li>- Recognition of the importance of facilitating strategic progress (getting rid of blockages, showing that things can be done, picturing the benefits, simplifying things where they can be)</li> <li>- Insistence on 4 strategic projects, approved once</li> </ul>

*“In the early stages there simply was not enough awareness of the rationale and policy justification for the strategies. Developing strategic awareness was therefore the first task in engaging with the voluntary sector .... Perhaps with all of the sectors.”*

Headline Finding:	<b>Clear priorities and flexible activities</b>
Evidence summary	<ul style="list-style-type: none"> <li>- Long term drive, which is self evaluative</li> <li>- Clarity about what needed to change</li> <li>- Openness to different approaches if they were plausible ways of making changes</li> <li>- Reading big picture and joining up the story locally</li> <li>- Lots of interventions: no magic bullet</li> <li>- Even though there were lots of activities, the approach was based on commissioning activity</li> </ul>

*“There was a strong focus on transfer of practice, working across institutional boundaries, working across phases.”*

Headline Finding:	<b>Plausible relationship between scale of resources and nature of the problems being addressed</b>
Evidence summary	<ul style="list-style-type: none"> <li>- Scale of resources invested over the 7 years</li> <li>- Ease with which the resources could be accessed</li> <li>- Scale of outputs</li> <li>- Knowing problems locally (both supply and demand side) <u>and</u></li> <li>- Knowing what national government wanted</li> </ul>

*“We wanted to avoid the endless, small project appraisal. It took 9-12 months for the four original projects to get appraised and approved by the regional office. The leading members of the Board insisted that this was done in this way. The impact of this one technical detail on the subsequent efficiency and effectiveness of the scheme overall is hard to over estimate.”*

Headline Finding:	<b>High levels of performance and sustainable processes</b>
Evidence summary	<ul style="list-style-type: none"> <li>- Year on year delivery targets achieved</li> <li>- Escalating volumes over the first 5 years</li> <li>- 3<sup>rd</sup> party assessments and audits all squeaky clean</li> <li>- resilient organization: both performs and is sustainable</li> </ul>

*“Not simply project managers...Credibility in their fields....Staff development and facilitation skills....Strong regional and national networks – both were inter dependent...There was a strong set of practitioner networks and policy networks...strategic and practitioner facilitation...”*

Headline Finding:	<b>Systems met standards, but with a light touch</b>
Evidence summary	<ul style="list-style-type: none"> <li>- Light touch business planning and project appraisal</li> <li>- Decisive, low fuss (if not no fuss) project development practices</li> <li>- Capacity to accommodate informality and rigour</li> <li>- Reliable SRB administrative managements</li> </ul>

*“Fertile ground and framework...based on wholesale adoption of new initiatives...not piecemeal, not prepared to be piecemeal (but willing to experiment)...working with whole services”*

Headline Finding:	<b>Working through partners in order to change the mainstream</b>
Evidence summary	<ul style="list-style-type: none"> <li>- Governance was independent of the partners, but activity planning and development was not</li> <li>- The development functions were distributed throughout the partner organisations</li> </ul>

*“Evident understanding of the issues...not delivering, enabling...commitment to change – willingness to lead actions at all levels in the partnership”*

Headline Finding:	<b>Credible project managers who are more than project managers</b>
Evidence summary	<ul style="list-style-type: none"> <li>- Exemplary project management practices by majority of activity managers</li> <li>- Engagement of wide range of parties from different professional communities</li> <li>- Kept partnership at the ‘cutting edge’ of policy</li> <li>- Widespread learning as a by product of involvement</li> </ul>

*“Respected, and respectful – determined to “challenge” ....the best SRB scheme I have ever encountered”*

## Section 1 Partners' assessment

This section of the report examines the perspectives of the partners – both the strategic partners, and those involved in the executive planning and direction of the CSDP.

There have been changes over the life of the scheme to the partners who have participated, and the roles that they have fulfilled. Founder partners added to their numbers by inviting development partners to help with the implementation of strategy

<b>Strategic partners</b>		
	Founder	Development
Local Education Authority (LEA)	✓	
Training & Enterprise Council (TEC)	✓	
Birmingham Voluntary Service Council (BVSC)	✓	
Birmingham Chamber of Commerce & Business Link		✓
Job Centre Plus		✓
Connexions Service		✓

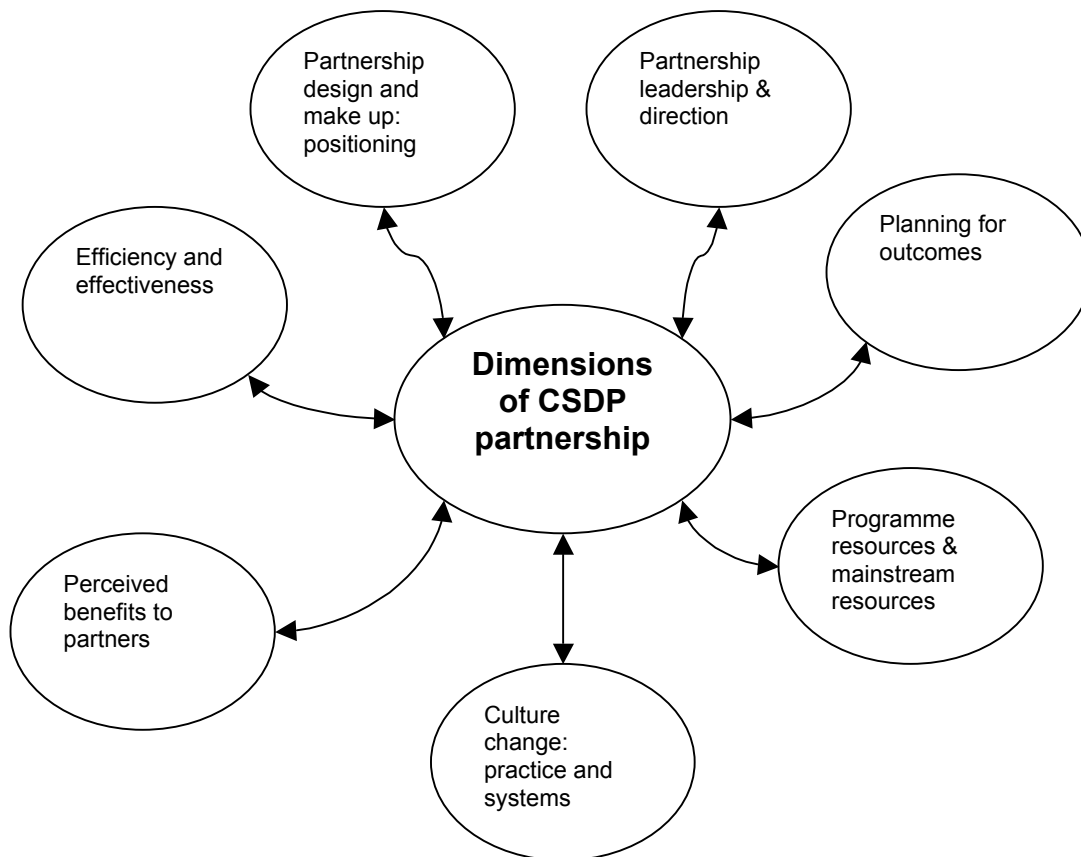
These were complemented by activity managers, drawn from the following organisations / sectors.

<b>Activity managers</b>
LEA
Learning and Skills Council (successor to TEC)
Voluntary sector
Adult Education Service
Library Service
Employment Service (Job Centre Plus)
Employers / private sector organisations
Chamber / Small Business Service
CEBP / Connexions
Probation Service

## **Extracts from interviews and quotes**

This sub section of the report provides the main analysis from the interviews of both strategic partners and activity managers. The conclusions are organised into two main sub sections (on this basis) and around a series of themes.

Evidence from partner (of both types) appear in other sub sections of this report, as part of the evidence for the assessment of aspects of systems and vfm. The analysis is organised around seven dimensions of the partnership. These are illustrated below:



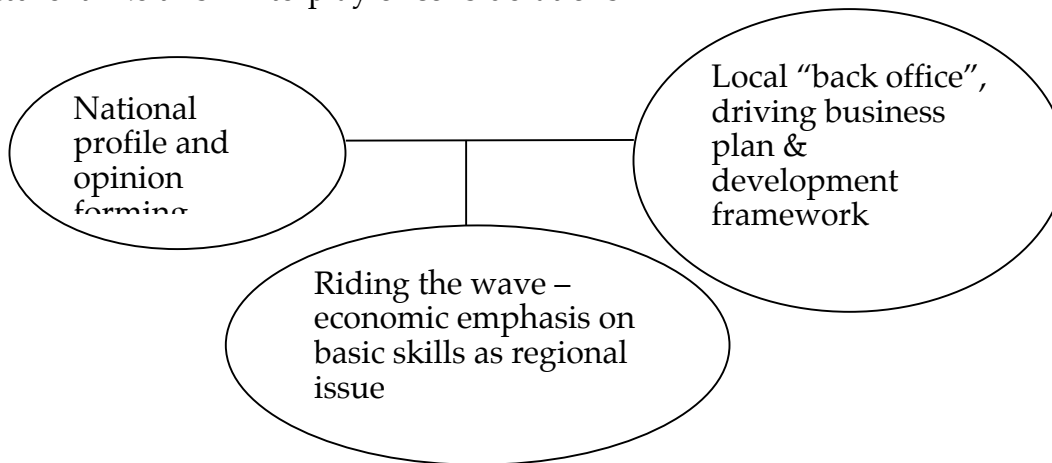
These same dimensions are used for the analysis of project comparators in the Appendices.

## “Partnership design and make up: positioning

Uniquely in Birmingham in my experience, the partnership actually set its own agenda. The partnership was therefore able to maintain ownership of its own strategy and priorities, in spite of its reliance on SRB funding.

The partnership developed significant legitimacy - through its neutrality, independence and the persuasive picture that it painted.

Picture it like this...interplay of considerations



Certainly been a model across the region, if not nationally.

Start with a plan and then find monies – therefore avoid fragmentation

Preconditions of success included ...unambiguous lead from the very top – helped that this was cross sectoral, and multi agency  
Scale of resources and plausibility of approach – inter linked...Serious money  
Able to secure collaborative approaches

Working with & across other partners BVSC, Library Service, Private Sector, Education & has enabled partners to work together operationally

It's about changing ways of working within the partner agencies and was definitely ahead of it's time – and fed into the debate into the national agenda.

On the whole it has changed ways of working for the long term

CSDP has identified KEY CHANGES in the agenda and driven them through

contributed towards and facilitated benchmarking across Birmingham & Solihull – including work done at ward level

CSDP “has made a huge contribution”

## **“Partnership leadership and direction**

As such, the CSDP became a catalyst for community learning. It has helped to make the core skills agenda more strategic and develop the capacity of our (the voluntary) sector to engage in planning and delivery. As such, there has been a combination of strategic development and sector development. Indeed, the decision to concentrate on investment in the voluntary sector as a provider of community learning (in various forms) was in itself a strategic decision.

The structure and the people involved permitted dialogue. Relationships were built through the CSDP between both key individuals and key organisations. We were able to “storm” early on in the process. There was structural facilitation early on in the process....there were no competing visions at the outset...mainly because the board members provided perspective and functional leadership, rather than represented established interests. The fact that core and basic skills was no one’s statutory responsibility helped enormously with this process.

The project manager had a unique set of skills, drawing on experience in basic skills and adult learning. He was a strategic thinker on behalf of his team, on behalf of the Board and partners, more generally. He was actively reading the big picture and then joining this story up locally.

Local Area Based Regeneration Initiatives sought accountability from the CSDP. But the CSDP was unaffected by this. Part of the capacity to deliver on the strategic aims came from knowing the problems locally, and knowing what national government wanted. Therefore, the scheme tended to not get deflected.

We avoided the institutional politics of “traditional” SRB schemes. Rather than that we developed an in built leverage model, under which the priorities for the investment of the CSDP funds were overwhelmingly developmental. Not only did this mean that there were few disputes about additionality – we only wanted to add value. It also meant that the involvement of partners and activity managers was incentivised. The CSDP resources meant that they were better equipped to get the best out of their own resources.

Fertile ground and framework...based on

- Wholesale adoption of new initiatives
- Not piecemeal, not prepared to be piecemeal (but willing to experiment)
- Worked with whole services
- Evident understanding of the issues
- Not delivering, enabling
- Commitment to change – willingness to lead actions at all levels in the partnership
- Respected, and respectful – determined to “challenge”

The Partnership Manager has helped to drive forward the agenda, rather than be led by the agenda of particular partners

Flexible & committed Board members, involving strategic involvement.

CSDP is “willing to risk failure” – in an attempt to achieve the outputs - admirable

Clearly about capacity building of organisations – identifying the gaps & then advising how to fill them

CSDP is an excellent source of reasons for good ideas

### **“Planning for outcomes**

..... In some ways, the partnership has used supply chain principles to develop long term relationships through which core and basic skills get delivered. The CSDP has never pretended to be at the top of the chain – but its member organisations are at the top. They made the judgement to arrive at programme agreements under which they could link together the planning and investment of money from different sources.

From the outset, there was absolute clarity about the focus on impacts.

The CSDP has embodied an attitude to planning. The key characteristics of the attitude include – deciding on the priorities, deciding which activity is likely to be most effective, actively getting involved in the design of activities, setting parameters (time, budget, outputs, quality etc), acting quickly, progress chasing etc. This attitude and approach sits alongside activity managers’ experience that they can relatively easily get the resources they need provided that they work within these planning assumptions. Maybe this has created the virtuous circle of effective scheme management engaging with effective activity managers.

Another factor in the focusing on what matters, came from the forms of networking which the scheme practised. It tended to network with other

networks, thereby making the task manageable, and making clear that it was in the business of strategic influencing.

Partnership approach has been the best way to take this forward – allowed a “level of honesty”

Moved away from viewing it as a time – limited programme to a development organisation - shifting the baselines

Into planning for outcomes – they work within the organisation to plan the outcomes and the projects through tight management controls

### **“Programme resources and mainstream resources**

The decision to *work through strategic partners* was genuinely developmental. At the inception of the partnership, there were counter pressures – to spend, to view the CSDP as “non core business”, to carve up the cake.

Authority is delegated to the Executive Team through the business planning process.

In every Area Based Initiative in the City so far, funding has become the story, even if it was not the story at the outset. In the CSDP the opportunity for system-wide change was the story that prevailed.

All sorts of “pots of money” have been brought to bear on core skills, LSC etc, and has been linked into the Strategic Plans for Colleges

In future all of the CSDP funded projects will have a life of their own beyond the SRB funding – particularly because they are so successful

Exceptionally good at ‘Influencing the Mainstream’

Don’t feel that you have to bend your project to fit the funders’ criteria with CSDP

### **“Culture change practice and systems**

The voluntary sector itself experienced a cycle of involvement in the partnership...it was hard to begin with for us to get involved in a non competitive bidding regime...even though we thought it highly desirable.

In the early stages there simply was not enough awareness of the rationale and policy justification for the strategies. Developing strategic awareness was therefore the first task in engaging with the voluntary sector .... Perhaps with all of the sectors.

There are always periods of anxiety early on – fearing that the technocrats have got it fixed, and have fixed it in their interests.

Theories of change under pinned what we needed to try and do....key components of that included:

- Strategic planning
- Clarity about what needs to be done – from leading members of the Board
- Plausibility of scale of resources in relation to the nature of the problems being addressed
- Use of professional development / updating seminars and briefings to paint the persuasive picture
- The LEA relinquished control, and accepted the challenge (not all of the answers are within the local authority services)
- Emphasis on project development, and the capacity to draw on evidence of what works in actively helping activity managers to develop projects
- Transparent accountability
- Willingness to take on responsibility and encourage others to do the same
- Motivated by the desire to make a difference
- Motivated by a sense of the urgency of making progress and the importance of the Agenda
- Attitudes: Speed of response, can do, we can fix it etc

There was a strong focus on *transfer of practice*, working across institutional boundaries, working across phases.

The scheme has involved excellent practitioners....who worked with outstanding effectiveness on projects. The excellent practitioners had outstanding skills and experience

Not simply project managers...Credibility in their fields....Staff development and facilitation skills....Strong regional and national networks – both were inter dependent....There was a strong set of practitioner networks and policy networks...strategic and practitioner facilitation...

<b>Practitioner community</b>	<b>Policy community</b>
Project team	DFES strategy unit
Specialist practitioners	Neighbourhood Renewal Unit
<i>More than</i> project managers	Adult and Basic Skills Unit
Very strong facilitation skills	
Strong, shared value: systems change and continuous improvement	
Used of attached staff <i>to work within</i> partner organisations, rather than secondees working outside their organisations	

CSDP has been ahead of the game – so that the partnership creates tools that can then be used by the Basic Skills Agency – eg “Language Screening & Assessment toolkit.”

Also – the types of capacity building is a feature – range of work has allowed to intervene at different levels within organisations

Often the solution for developing KS3 is not about literacy and numeracy – its about working a cross a range of agencies – CSDP encourages that.

CSDP is an interesting blend of service and finance that doesn't suffer fools gladly

### **“Perceived benefits to partners**

Development worker investment enabled us to raise the game and market make with colleagues and with partners.

The CSDP was acting on neutral territory. – there were direct benefits from involvement for individuals and institutions.

this year will be the final “pilot year” and then it will be rolled out by the mainstream next year

unfortunately, its almost impossible to unpick the impact of the CSDP compared with that of the Standards Fund ...but, there have been HUGE IMPROVEMENTS in the standards of literacy & numeracy across the City through use of the CSDP and the Standards Fund

### **“Efficiency and effectiveness**

There was a contracting model between the founder partners, which was feasible and felt fair. The contracting model was far more user friendly than people were used to...

We wanted to avoid the dreaded project appraisal. It took 9-12 months for the four original projects to get appraised and approved by the regional office. The leading members of the Board insisted that this was done in this way. The impact of this one technical detail on the subsequent efficiency and effectiveness of the scheme overall is hard to over estimate. Many of the virtues and benefits of the scheme in the eyes of activity managers could not have been secured without the framework provided by the approval of 4 strategic projects, and the related business planning (and development framework).

There is a re-profiling which takes place every three months

Squeaky clean - subject to District Audit & internal audit.

Produced a procedures manual for the schools on how they could bid for the money (under the business plan themes) & then how to manage the money. This has been produced in February & March and updated every year and then put on the Birmingham grid for learning

All of the case sheets notes also go on the Birmingham grid for learning

Quite tightly managed - colleagues chase up schools up to make sure that the money is spent.

Possible for all schools to get involved in a "commissioning process", but need to assess whether there are any "Pet Proposals"

Partnership has helped LSC work across sections within the LSC achieving their action plan targets –

LSC has a capacity-building agenda & CSDP has allowed LSC to work with particular client groups – which includes a/c young men, women whose 1<sup>st</sup> language isn't English

range of VFM indicators – but the core skills delivery is not always commissioned on unit -cost basis

People now "Bite your arm off for Basic Skills Training" – down to CSDP influence

The management style is hands off, with very few meetings!

The partnership attends our meetings, we are not summoned to its meetings...

Easier to work with the CSDP because it is a flexible organisation which is small & tightly managed

## Lessons from perspective of partners and stakeholders

The discussions with the partners and stakeholders *confirm the importance* of:

Dimension of partnership	Evaluation lessons from the experience of partners and stakeholders
Partnership design and make up: positioning	<ul style="list-style-type: none"> <li>- Clout</li> <li>- Neutral, non partisan composition</li> <li>- Structures independent of any of the partners</li> <li>- In charge of the thinking and planning for improvement</li> <li>- Positioning on policy territory which was agreed as a priority, but for which no one partner had a leading responsibility</li> </ul>
Partnership leadership and direction	<ul style="list-style-type: none"> <li>- Consistency of purpose over the whole period of the scheme</li> <li>- Clarity of purpose</li> <li>- Credibility with both practitioners and public policy opinion formers</li> <li>- Uncompromising interest in setting agenda and sticking to it; <i>yet</i></li> <li>- Balancing this with uncompromising commitment to working with and through partners</li> <li>- Active, periodic review of the fitness for purpose of the partnership</li> </ul>
Planning for outcomes	<ul style="list-style-type: none"> <li>- Agreement over the headline indicators that needed to change in the baseline</li> <li>- From the outset all activity was judged against potential contribution to the improvement of the baseline position</li> <li>- Use of model practices for planning, activity development, and liaison with regional agencies (in scheme administration)</li> <li>- Joint commissioning by partners through the SRB project structure &amp; the annual Business Plan</li> <li>- Commissioning of "change" – in both baselines and processes</li> </ul>
Programme resources and mainstream resources	<ul style="list-style-type: none"> <li>- Development money: designed to help partners get more / get better out of their mainstream investment</li> <li>- Working with, but not always within, mainstream delivery systems</li> <li>- Scale of resources plausible in relation to the development needs: 'you could believe that it might work'</li> </ul>
Culture change: practice and systems	<ul style="list-style-type: none"> <li>- Emphasis on change - with part articulated, part assumed under lying philosophy about how to change</li> </ul>

Dimension of partnership	Evaluation lessons from the experience of partners and stakeholders
	<ul style="list-style-type: none"> <li>- Getting at, and investing in the service delivery systems</li> <li>- Planning interventions which challenge and develop professional practices</li> <li>- Championing the development of provision in new ways by new providers</li> <li>- Investing in professional development and infrastructure</li> </ul>
Perceived benefits	<ul style="list-style-type: none"> <li>- Partners benefiting directly from investment in the development of their services, if they commit to the strategy and values of the CSDP</li> <li>- Commissioning of activity from within the members of the partnership</li> <li>- Partners learning how to operate effectively within a multi agency strategic partnership</li> <li>- Voluntary sector learning how to share the lead in a strategic partnership</li> </ul>
Efficiency and effectiveness	<ul style="list-style-type: none"> <li>- Being efficient (quick, inexpensive, doing what you said you would etc)</li> <li>- Being seen to be efficient, by both the standards of the typical practices of the partner organisations, and by the standards of other SRB schemes</li> <li>- Being concerned about effectiveness (measuring what was happening to the baselines, using what was learnt from that to change practice etc)</li> <li>- Being seen to be concerned about effectiveness (briefing sessions, discussing choices about activity design in terms of evidence, evaluating activity etc)</li> <li>- Contracting with partners through straight forward and timely mechanisms</li> <li>- Complying with SRB administration and monitoring standards, with minimum hassle to activity managers</li> <li>- Re-profiling to take “money worries” back off the activity managers, and re-distribute resources elsewhere in the programme</li> </ul>

## Section 2 Activity Manager's Assessment

Activity managers are a special category of partner. They are the project managers in the partner organisations that act as facilitators, administrators and project planners for the activity. They are responsible for the SRB monitoring and control compliance, on which rest significant parts of the credibility of the whole scheme.

Broadly speaking, their assessment echoed and re-inforced that of other partners, but was different in some important details. These are reflected below.

Activity managers provided evidence of the following *important lessons*:

Dimension of partnership	Evaluation lessons from the experience of activity managers
Partnership design and make up: positioning	<ul style="list-style-type: none"> <li>- Focus on development fitted in with activity manager's own priorities</li> </ul>
Partnership leadership and direction	<ul style="list-style-type: none"> <li>- Consistency and seniority of leadership kept the CSDP free from factional representation</li> <li>- Year on year continuity of planning was a 'new way of working'</li> </ul>
Planning for outcomes	<ul style="list-style-type: none"> <li>- Involvement of practitioners in the design of the interventions</li> <li>- The decisions about the implementation mechanism came last in the planning sequence</li> <li>- Lots of small (but coherent) interventions: no magic bullet. This diversity of activity was a real strength</li> </ul>
Programme resources and mainstream resources	<ul style="list-style-type: none"> <li>- CSDP added to what was there, and this changed over time. It was possible to use CSDP to <i>add flexibly</i> to other resources</li> <li>- Tie in with the systemic investments in improvements in delivery organisations (e.g. annual school improvement planning)</li> </ul>
Culture change: practice and systems	<ul style="list-style-type: none"> <li>- Telling practitioners about what was working (either in the City or elsewhere)</li> <li>- The process of activity development and appraisal helped activity managers to focus in on 'what difference their activities would make'</li> <li>- If things were shown to work, they were <i>re-</i></li> </ul>

<b>Dimension of partnership</b>	<b>Evaluation lessons from the experience of activity managers</b>
	<p>designed and improved, and then widely distributed</p> <ul style="list-style-type: none"> <li>- Activity driven by development priorities in delivery organisations (e.g. schools)</li> <li>- Experience of working practices under CSDP that worked have been replicated in other settings</li> <li>- Diversity of activity provided lots of ways of being involved: the combination of little interventions helped to create the conditions for change</li> </ul>
Perceived benefits	<ul style="list-style-type: none"> <li>- Easy to deal with</li> <li>- No 'game playing' over priorities and money</li> <li>- Working with scheme management who paid attention to detail, know what it was like to deliver core &amp; basic skills provision. Therefore,</li> <li>- Professionally credible</li> </ul>
Efficiency and effectiveness	<ul style="list-style-type: none"> <li>- very straight forward processes (by comparison with other SRB schemes, and funding of this type)</li> <li>- focus on development meant that the CSDP activities were integrated into other services and activities which the partners had in hand: thereby, efficiencies in activity management were optimised</li> </ul>

## A note on resilience

The CSDP has remained remarkably consistent in its structures and purpose over the past 7 years. This resilient quality is an interesting perspective on the capacity of the CSDP to respond, and endure. There are two sets of definitions of resilience in soft systems theory, currently in use. The first of these centres around concepts of performance, the second around concepts of sustainability.

One set of definitions of *resilience as performance* focuses on efficiency, control, constancy and predictability - all attributes at the heart of desires for fail-safe design and optimal performance.

The other distinct set of definitions for *resilience as sustainability* focuses on persistence, adaptiveness, variability and unpredictability - all attributes embraced by evolutionary or developmental perspectives. These latter attributes are at the heart of understanding sustainability.

Aspect of resilience	Assessment of CSDP			Tools and practices that support resilience
	Emergent	Established	Advanced	
Making connections.			✓	Networking with networks – both locally and nationally Participation in regional and national policy development
Avoiding seeing crises as insurmountable problems			✓	Reading the future trends Projecting the scale of potential future needs Lots of small interventions providing a drive to the scheme
Accepting that change is a part of partnership working			✓	Underlying ethos and philosophy of the CSDP Developmental focus of the Board
Moving toward your goals			✓	Clear tracking of the progress towards the baseline changes in view Target setting at the level of the strategic framework
Taking decisive actions.			✓	Use of business planning 4 project structure to the scheme

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Aspect of resilience	Assessment of CSDP			Tools and practices that support resilience
	Emergent	Established	Advanced	
				Speed with which decisions can be made to spend on activities (so long as they are consistent with business plan) Focus on improvement and "fixing things"
Looking for opportunities for partnership development			✓	Evaluation of activities Revisions to the strategy Consideration of the future structure of the CSDP
Nurturing a positive view of partnership		✓		WWW site Newsletter 'Moving the Mountains' publication Being able to respond effectively to national developments
Keeping things in perspective			✓	Tracking progress on targets against original baselines, and national & core city comparators
Maintaining an aspirational outlook			✓	'Learning Cities' framework Re-setting the strategy for the next 7-10 years

### Section 3 Systems' Assessment

In this section of the evaluation, we assess the systems that were developed and used to support the implementation of the strategy. These are in the main

- Administrative (covering governance, scheme and activity)
- Planning
- Management
- Evaluation systems

They are considered from two perspectives - scheme wide and activity level.

#### Scheme wide

System	Aspect of system
Board administration	<ul style="list-style-type: none"> <li>- Company administration</li> <li>- Conduct of meetings</li> <li>- Link of Board with rest of scheme</li> </ul>
Strategy development	<ul style="list-style-type: none"> <li>- Baselines</li> <li>- Strategy</li> <li>- Structure of the SRB scheme (strategic projects)</li> <li>- Development framework</li> <li>- Business Planning structure – budgets and target setting</li> </ul>
Strategy management	<ul style="list-style-type: none"> <li>- Executive managers</li> <li>- Executive team</li> <li>- Annual business planning</li> <li>- Reporting &amp; feedback on progress</li> <li>- Re-profiling</li> </ul>
Evaluation and monitoring	<ul style="list-style-type: none"> <li>- Scheme monitoring</li> <li>- Strategy evaluation (policy and practice)</li> <li>- Scheme / programme evaluation</li> </ul>

#### Activity level

System	Aspects of system
Activity development	<ul style="list-style-type: none"> <li>- Commissioning</li> <li>- Specification development</li> </ul>

<b>System</b>	<b>Aspects of system</b>
	<ul style="list-style-type: none"> <li>- Project development</li> <li>- Project appraisal</li> </ul>
Activity management	<ul style="list-style-type: none"> <li>- Activity agreements</li> <li>- Feedback mechanisms</li> <li>- Re-profiling</li> </ul>
Activity evaluation and monitoring	<ul style="list-style-type: none"> <li>- SRB activity monitoring</li> <li>- Activity write ups</li> </ul>

Each of these aspects of the systems are considered in turn in the remainder of this section of the evaluation.

### **Board administration**

<b>Aspect of system</b>	<b>Strengths</b>	<b>Shortcomings</b>
Company administration	Follow Company House procedures	Membership did not reflect the realities of running the scheme  Risks that meetings were inquorate
Conduct of meetings	Periodic  Succinct papers  Strong emphasis on direction, rather than detail  SRB appraisal & approval conducted annually through business plan	Uneven attendance, especially from LEA, and political appointees
Link of Board with rest of scheme	Board keeps out of detailed decisions about which activities get supported	Reliance on particular skills of the co-ordinator to interpret Board decisions and guidance into the business plan. Effective, but reliant on particular set of skills.

## Strategy development

Aspect of system	Strengths	Shortcomings
Baselines	Developed by the CSDP directly, and through synthesis of partners' data	Before establishment of the LSC, macro analysis of baseline for adults were poor quality
Strategy	Developed as an explicit activity by the Board  Revised during years 5 & 6 and for 7 years from 2003 onwards	
Structure of the SRB scheme (strategic projects)	Scheme confined to 4 projects  SRB <i>approval</i> required just once at start of scheme	Unlikely to be replicable in the light of present appraisal standards used by dti and ODPM (unless these standards change).
Development framework	Enabled the Board and Executive Team to focus in on changes that needed to be made in systems of planning & delivery	
Business Planning structure – budgets and target setting	Explicit focus of activity, and driver of budgeting and investment  Cycle, and framework development process, rather than prescriptive set of actions	Not widely known outside the Board and Executive Managers' group

### Analysis of budgeting by types of activity

In this sub section, we group the activities into broad types, on a basis that is different to that used in the original project proposals. The types of activity tie in with some features of the theories of change<sup>4</sup> that under pin the scheme as a whole – and illustrate the *budgeting (or investment) policy* that has under pinned the strategy for the past 7 years.

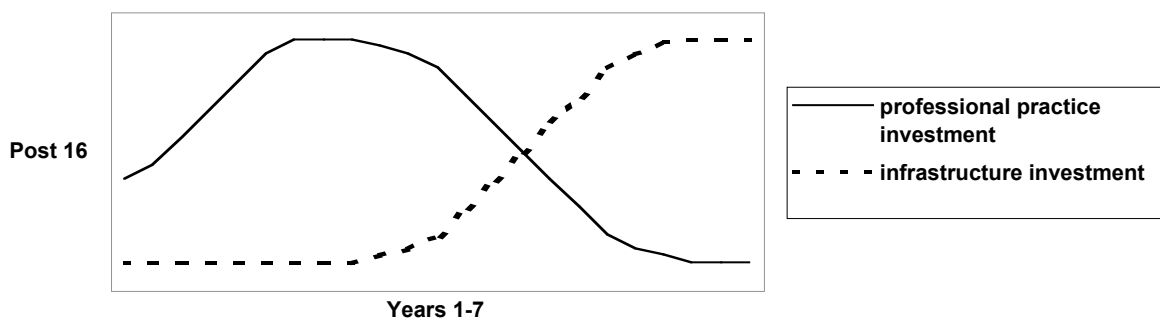
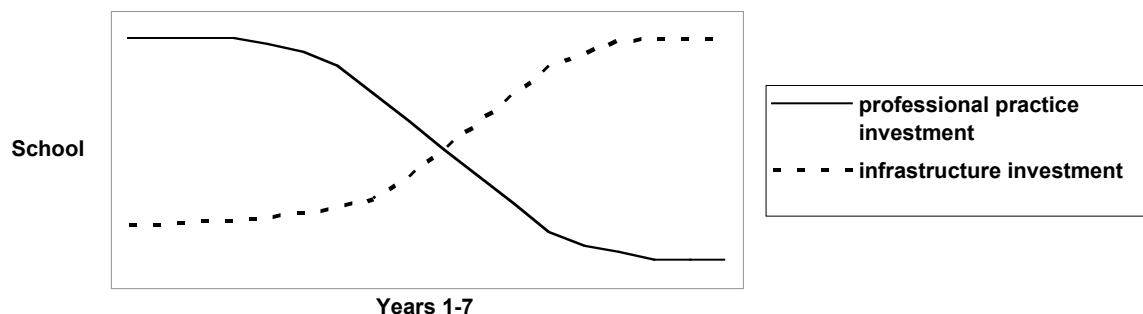
<sup>4</sup> These are discussed in more detail in Part 3 of this evaluation, the 'How to Guide and Toolkit: Planning for Outcomes'

Types of activity	Indicative activities under this type	% of spend across 7 years
Services to beneficiaries	<ul style="list-style-type: none"> <li>- Demonstration models</li> <li>- Effective practice exchange</li> </ul>	6%
Professional practice development activity	<ul style="list-style-type: none"> <li>- Briefing sessions</li> <li>- Professional updating</li> <li>- Professional development</li> <li>- Retraining of staff to do different jobs / add to their job</li> </ul>	40%
Infrastructure development activity	<ul style="list-style-type: none"> <li>- Development of the basic and core skills delivery capacity</li> <li>- ICT</li> <li>- Capacity building</li> <li>- Sectoral investment</li> <li>- Investment to support re-trained staff</li> </ul>	48%
Evaluation and learning	<ul style="list-style-type: none"> <li>- Evaluation studies</li> <li>- Facilitation of service developments</li> </ul>	.5%
Annual planning (business planning & development planning)	<ul style="list-style-type: none"> <li>- Networking and related developments</li> <li>- Executive team</li> </ul>	2%
Scheme management & direction	<ul style="list-style-type: none"> <li>- Strategy development and maintenance</li> <li>- Policy development and influencing</li> </ul>	3%
Scheme administration	<ul style="list-style-type: none"> <li>- SRB administration</li> <li>- Support to activity administration</li> </ul>	.5%

### Comment on resources allocated to different types of activity

- relatively low amount spent on management / direction – with more investment being needed in the key Years 1-3.
- direct funding of provision to beneficiaries (as demonstration models etc) kept very low and tailing off after Year 3/4/5
- very little spent on overt learning / evaluation (<1% each year, average) – but adding up overall to a figure that isn't all that far from the amount Sparkhill / Sparkbrook / Tyseley SRB2 (as the 'closest SRB relative' in Birmingham) spent on evaluation. Very low spend by comparison with standards recommended on European programmes – some of which approach 10%. The processes of development work and planning, however, on this scheme mean that there has been a very high level of learning as a *by product of engagement with the scheme*.

- declining proportion needing to be spent on annual business planning mechanisms as partners more and more 'got the hang' of what CSDP was about – although the real amount goes up across the years (reflecting the increasing 'central' complexity of holding an expanding, diverse, developmental scheme together without everything falling apart in the crucial Years 3-5 years where there were significant step changes in the volume and the speed of developments being pushed forward)
- more was done in the early years to retrain staff in to doing different jobs – with some infrastructure exchange needed to support them in this – and, by the end of the scheme, there was more focus on securing permanent infrastructure changes (to be delivered by the new / enhanced professional practices). There was also (probably) a time differential between school and post 16, as illustrated in the tables below



Although, the scheme was not driven by funding considerations ("the funding was not the story", as partners' put it in the interviews), there clearly was a set of policies on funding. These policies aimed to make sure that

- Professional practice development and infrastructure were priorities
- The developmental focus of the CSDP investment was in trying to lever change; and

- The CSDP investment worked *with other* mainstream resource planning

It was critical to the scheme as a whole that there was strategic resource planning taking place as part of the business planning process. In the table that follows, the costs are distributed across these types of activities for all of the years of the scheme.

**Analysis of all years' resources by type of activity**

Year	Year 1		Year 2		Year 3		Year 4		Year 5		Year 6		Year 7		Total
	£ (est)	% of £	£ (est)	% of £	£ (est)	% of £	£ (est)	% of £	£ (est)	% of £	£ (est)	% of £	£ (est)	% of £	£ (est)
Services to beneficiaries	40,000	5.7	93,989	4.5	271,748	9.5	192,729	6.2	661,513	11.1	339,373	4.7	125,188	1.9	1,724,540
Professional practice development activity	286,698	40.6	1,491,560	72.0	1,180,541	41.4	1,556,860	49.8	1,634,896	27.5	2,820,510	39.3	2,516,405	37.4	11,487,470
Infrastructure development activity	258,007	36.6	339,564	16.4	1,140,556	40.1	1,137,261	36.4	3,296,701	55.5	3,684,486	51.3	3,791,559	56.4	13,648,134
Evaluation and learning	4,100	0.6	4,100	0.2	4,851	0.2	39,745	1.3	40,000	0.7	50,000	0.8	56,043	0.8	198,839
Annual planning (business planning & development planning)	47,195	6.7	74,787	3.6	55,623	2.0	70,000	2.2	150,000	2.5	87,709	1.2	99,999	1.5	585,313
Scheme Management & direction	50,000	7.1	50,000	2.4	173,181	6.1	108,405	3.5	145,890	2.4	174,473	2.4	61,203	1.6	809,703
Scheme administration	19,000	2.7	19,000	0.9	20,000	0.7	20,000	0.6	20,000	0.3	24,000	0.3	70,551	0.4	146,000
<b>Total</b>	<b>705,000</b>	<b>100</b>	<b>2,073,000</b>	<b>100</b>	<b>2,846,500</b>	<b>100</b>	<b>3,125,000</b>	<b>100</b>	<b>5,949,000</b>	<b>100</b>	<b>7,180,551</b>	<b>100</b>	<b>6,720,948</b>	<b>100</b>	<b>28,599,999</b>

### Strategy management systems' assessment

Aspect of system	Strengths	Shortcomings
Executive managers	<p>Group drawn from key service managers from the leading partners.</p> <p>Flexible, task orientated group, both feeding into the development of business plan and concentrating on its implementation.</p> <p>Linking mechanism between the CSDP and the mainstream services provided by partners.</p>	
Executive team	<p>Executive team – through attachments and its way of working – has been a “network of networks.”</p> <p>Attracted and retained the involvement of highly regarded practitioners to lead projects</p> <p>Supplemented with attachments from key interest groups to drive forward some aspect of the CSDP strategy. Seen as development ‘runners’. Some stayed in their own organisation; some joined Executive Team.</p>	
Annual business planning	<p>Cycle based on Board priorities</p> <p>Framework for</p>	

<b>Aspect of system</b>	<b>Strengths</b>	<b>Shortcomings</b>
	commissioning activities	
Reporting & feedback on progress	Strong feedback to the Board, periodically  Emphasis on progress to the baseline changes, being sought	Weaker feedback to the Executive Management Group
Re-profiling	Critical process. Conducted quarterly.	

As indicated above, in some respects the strategy management has been approached on project management principles by people who were 'more than project managers' (as the leading partners see it). The objectives of this project management have consisted of:

- Managing the long term (>7 year) 'Project' that Birmingham has embarked upon to (in terms of the role of Core and Basic Skills in its Community Strategy):
- Significantly raise levels of adult literacy, language and numeracy
- Raise levels of pupil/young people attainments to national level then to level of best European comparator
- Close attainment gaps between groups of young people

The analysis template that follows, assesses the strategic management as evidenced by the CSDP against a series of effective practice characteristics:

Feature of effective practice in project management	Clearly evident	Evident to some extent	Not evident	Comment
<b>Overall Design</b>				
Use of effective practice		✓		CSDP has developed effective practice in this area.
User involvement	✓			User = users of the developments = LSC; LEA; Connexions etc. The users of services (ie. School children etc) are involved through the activity managers.
<b>Overall Planning</b>				
Service specification	✓			i.e. 'How will we know when we've got there?' i.e. vision and development framework – revised in Y5/Y6 to make more real
Service standards		✓		i.e. targets being/to be achieved; Annual developments
Roles & responsibilities	✓			Board, Executive managers, executive team, & development runners all with clear roles
Management arrangements	✓			Clear contracting agreements with partners to lead on particular strands of activity
Communications & reporting		✓		More mixed. CSDP kept a low profile. Although a high priority was placed on communicating the theories of change needed to underpin the strategic priorities.
<b>Overall Implementation</b>				
Set up	✓			High priority and clear strength
Timetabling & logistics		✓		Medium priority & at the strategy level, highly dependent on the actions of partners in developing activities that reflected the annual business plan priorities.

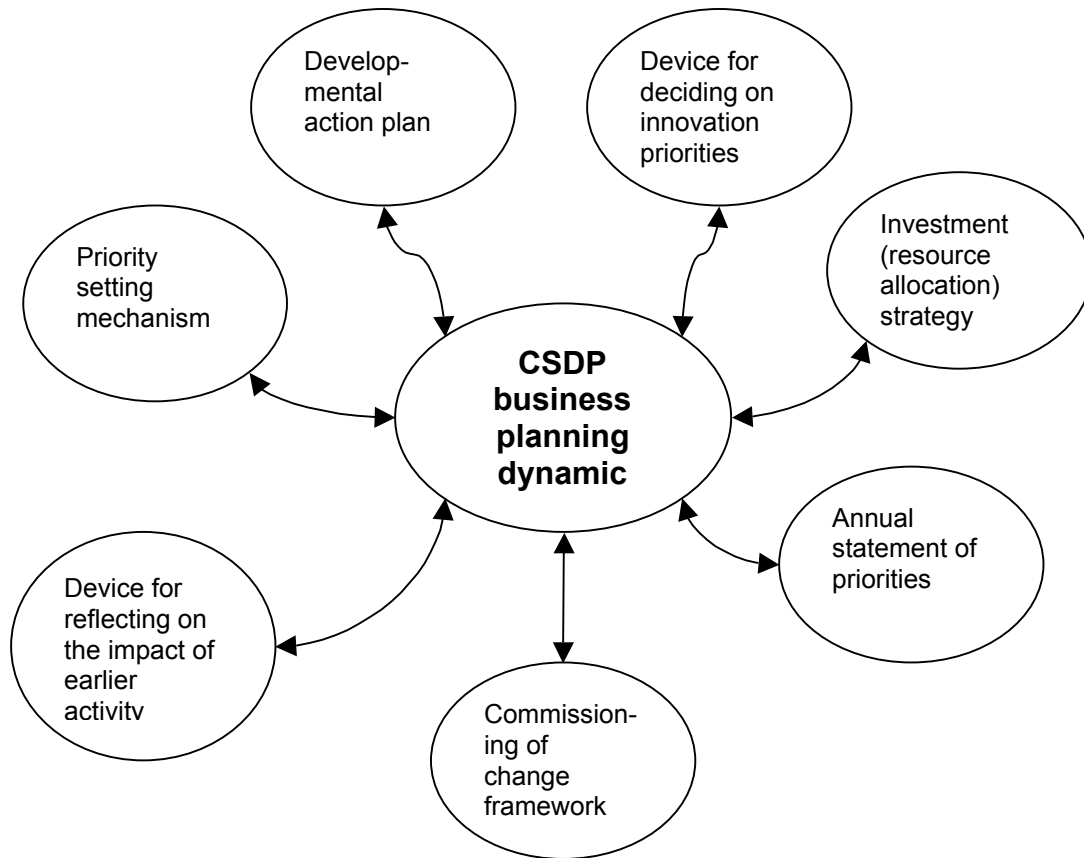
<b>Feature of effective practice in project management</b>	<b>Clearly evident</b>	<b>Evident to some extent</b>	<b>Not evident</b>	<b>Comment</b>
Monitoring & reporting		✓		Monitoring of outputs conducted in sufficient detail to meet the SRB standards. Real priority is monitoring of outcomes.
Financial administration & management		✓		Adequate to meet the SRB compliance standards.
Service improvement & trouble shooting	✓			Strong emphasis on change and development translated into the business planning priorities.
Steering (direction)	✓			High priority and clear strength
<b>Overall Evaluation &amp; review</b>				
3 <sup>rd</sup> party review		✓		Widely, but not comprehensively evident.
Peer to peer review			✓	Little practice of this across the CSDP. Some practice within partner organisations.

## **Business Planning system**

The business planning system (critical to the strategy development, management and activity development systems) is described and analysed in this sub section. Essentially, the business planning as practised by the CSDP was a combination of

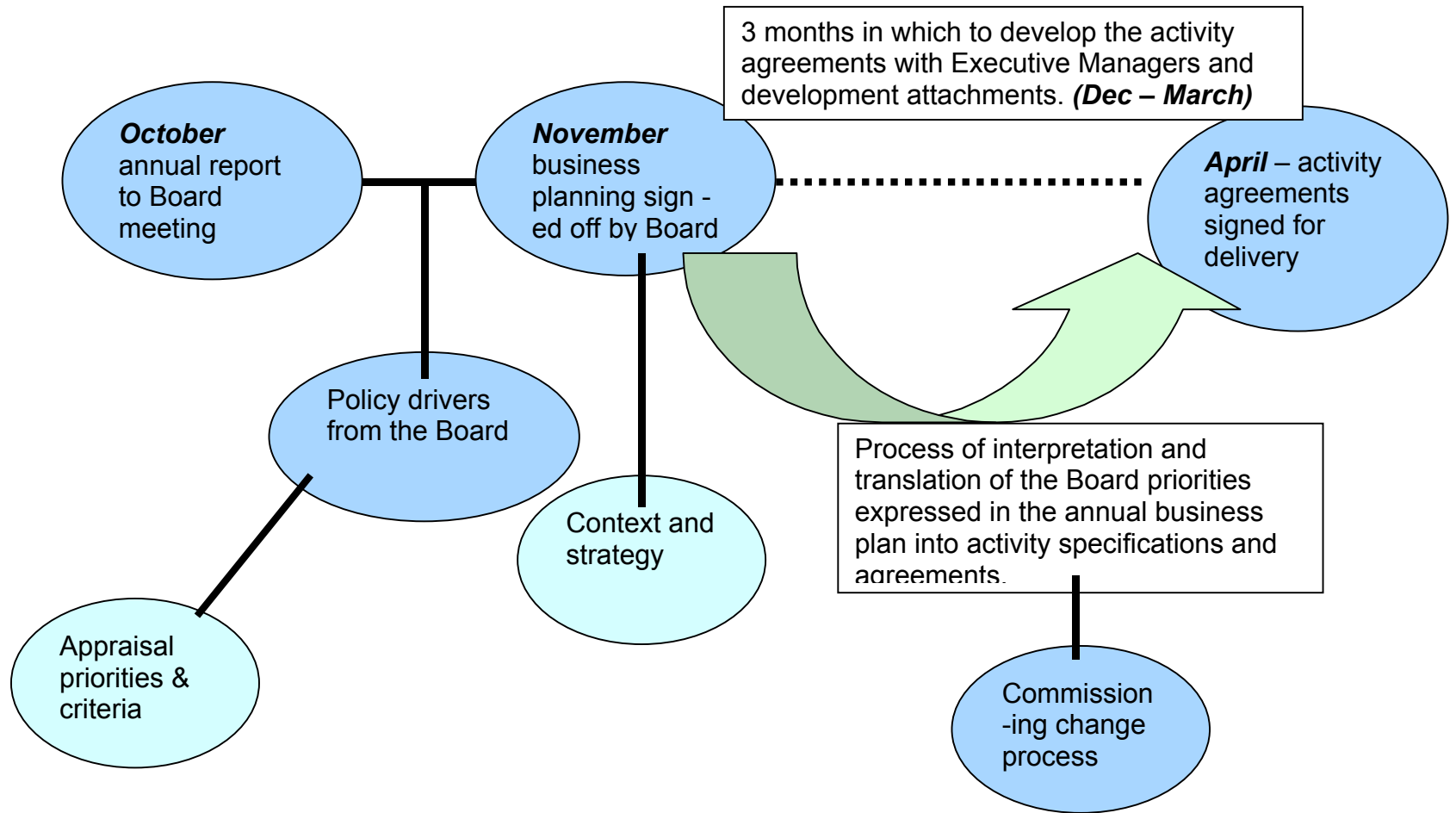
- Developmental action plan
- Priority setting mechanism
- Device for reflecting on the impact of earlier activity
- Device for deciding on innovation priorities
- Investment (resource allocation) strategy
- Commissioning framework
- Annual statement of priorities

The process was a mechanism through which collective thinking took place amongst the partners, so that there was a highly topical linking together of the activities of the CSDP and the institutional plans of the partners themselves.



In practice, the business planning process is a planning model rather than a scheduled set of activities. The factors in the diagram above inter-play with one another during the October – December phase of the annual activity planning cycle for the CSDP, during which time the following stages are worked through:

- Annual report on progress against last year's business plan
- Debate amongst Board over lessons from annual report, new developments in the operating context, and priorities for next planning period
- Development of draft of annual business plan for the next year, in order to provide the framework for the development of activity agreements
- Signing off of the annual business plan
- Development of activities, ending in the issuing of activity agreements in the following April



## **Strategy evaluation and monitoring**

<b>Aspect of system</b>	<b>Strengths</b>	<b>Shortcomings</b>
Scheme monitoring	Tests of reasonableness applied to the extent of monitoring – ‘does it help us assess our progress on the journey?’	
Strategy evaluation (policy and practice)	Process of annual business planning was a kind of strategy evaluation – essentially through peer to peer review within the Board and Executive group & team. 3 <sup>rd</sup> party scrutiny (between members of the CSDP and the wider community of policy makers and practitioners) extensive.	3 <sup>rd</sup> party evaluation of strategy limited
Scheme / programme evaluation	Limited 3 <sup>rd</sup> party evaluation Groups of activities reviewed and assessed during the life of the scheme Significant amount of implicit evaluation & learning taking place	Much evaluation implicit, and – perhaps – thereby the lessons have not been as widely circulated as they might have been

## **Activity systems**

There are 3 activity systems in use – activity development, management and evaluation. These are discussed in this sub section.

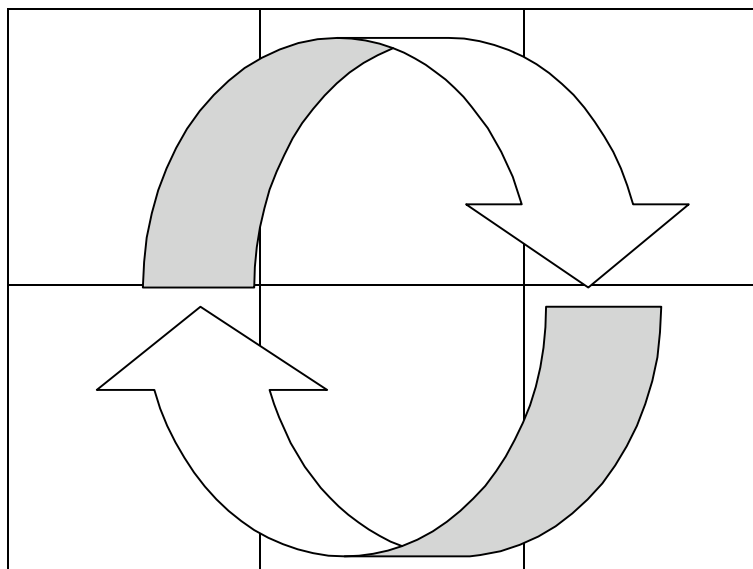
### **Activity development**

The context for the activity development systems is the business planning system model described in the preceding sub section but one. The boundaries between these different stages (in practice) were blurred. One of the clear findings from the activity manager assessment was the informality, clarity and effectiveness of the activity development process.

<b>Aspect of system</b>	<b>Strengths</b>	<b>Shortcomings</b>
Commissioning	Without naming it as such, the CSDP has put in place several working practices that underpin a commissioning process.	
Specification development	Broad priorities flowed from the business planning priorities. These were used as the basis for developing activities that addressed the Business Planning priorities.	
Project development	This process was led by the executive management team, and the development attachments.	
Project appraisal	Conducted with a light touch, as part of the pre-completion of activity agreements. An appraisal 'mind set' was built into the whole process of activity development.	

The activity development and commissioning process was a cycle (both annually through the Business Planning, and shorter term, during the year). On the

evidence of the assessment of activity managers, learning took place *during the journey*: adjustments in detail of activity design and implementation being made during the life cycle of the business plan. The scheme co-ordinator actively re-profiled activities on a quarterly basis.



***The interviewees did not discuss a particular model for outcome related planning.*** This model<sup>5</sup> approach (in which the process of development *cycles round* the various stages of the model) is an accurate depiction of the process of development that under-pinned the business planning model (described earlier) and the activity development process.

It is critical to note that this process of review, development and priority setting, took place annually at the strategic level (through the October – December business planning process) and annually (at the activity level through the December – April activity agreement process).

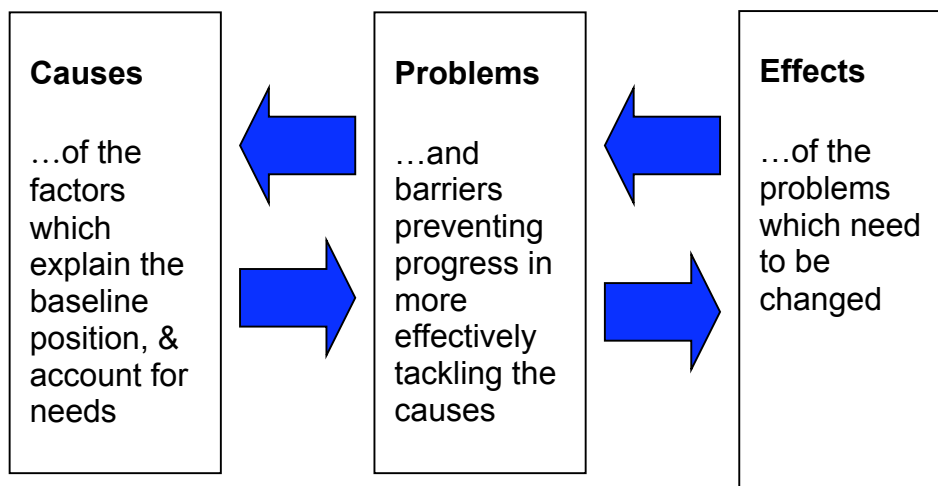
In both the strategic and activity annual review processes, principles of both design and *re*-design were followed.

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<sup>5</sup> The model that follows is adapted from the terminology and stages of Project Cycle Management, which is currently popular within Area Based Initiatives like New Deal for Communities.

<p><b>Policy context and priorities</b> – the strategic case for making a difference</p> <p><u>Business planning process</u></p>	<p><b>Identification</b> – the causes we want to focus on, the problems we want to tackle</p> <p><u>Business planning process</u></p>	<p><b>Formulation</b> – the possible solutions to the problem – narrowing the focus</p> <p><u>Business planning / priority setting</u></p>
<p><b>Evaluation</b> – learning what works – feeding this into the future of this programme</p> <p><u>Annual reporting</u></p>	<p><b>Implementation</b> – pre set up, set up, management, monitoring and corrective action etc</p> <p><u>Activity management &amp; re-profiling</u></p>	<p><b>Commitment and financing</b> – the process of investment appraisal – double checking the “return”</p> <p><u>Activity agreements</u></p>

It appears as though the business planning and activity planning processes within the CSDP were designed to address systems’ change wherever possible in tackling causes, rather than problems, or effects.



### Activity management

The nature of the scheme, and the role of partners in delivery of activity has meant that there was a significant reliance (during the activity delivery year) on the activity management practices within partner organisations. By comparison with other SRB schemes of this size, the CSDP supported a very small Executive Team.

<b>Aspect of system</b>	<b>Strengths</b>	<b>Shortcomings</b>
Activity agreements	Clear and simple. Flexible. Quickly entered into once the activity development process was completed.	
Feedback mechanisms	Efficient systems for feedback between activity managers and their executive managers	Limited feedback across the CSDP projects
Re-profiling	Conducted quarterly to move resources between the activities in order to invest in development activity (where it appeared to be working or needed)	

The main activity management from the CSDP point of view was the management of the 4 SRB projects i.e. holding the SRB scheme together sufficiently to get effective spend of available budget; securing of required outputs; securing shift from baseline to 7 year outcomes.

Feature of effective practice in project management	Clearly evident	Evident to some extent	Not evident	Comment
<b>Overall Design</b>				
Use of effective practice		✓		Evidence drawn on (where available) to help with the development of activities. Strong tie in with the emphasis on evidence of what works from the LEA (e.g. parental involvement)
User involvement	✓			User = users of the developments = LSC; LEA; Connexions etc
<b>Overall Planning</b>				
Service specification		✓		General specifications available through business planning process. Detailed activity specification varied from case to case.
Service standards	✓			Interpreted as targets, in so far as the activities all contributed to the overall scheme.
Roles & responsibilities		✓		Largely clear and understood. The CSDP seems to have been successful in involving effective activity managers that required relatively little supervision.
Management arrangements		✓		Activity management responsibility clearly understood.
Communications & reporting	✓			Strong reporting to the centre of the partnership.
<b>Overall Implementation</b>				
Set up	✓			All of these functions were clearly evident. The SRB scheme was administered to a high standard. In part this created a climate of trust and
Timetabling & logistics	✓			
Monitoring & reporting	✓			
Financial administration & management	✓			

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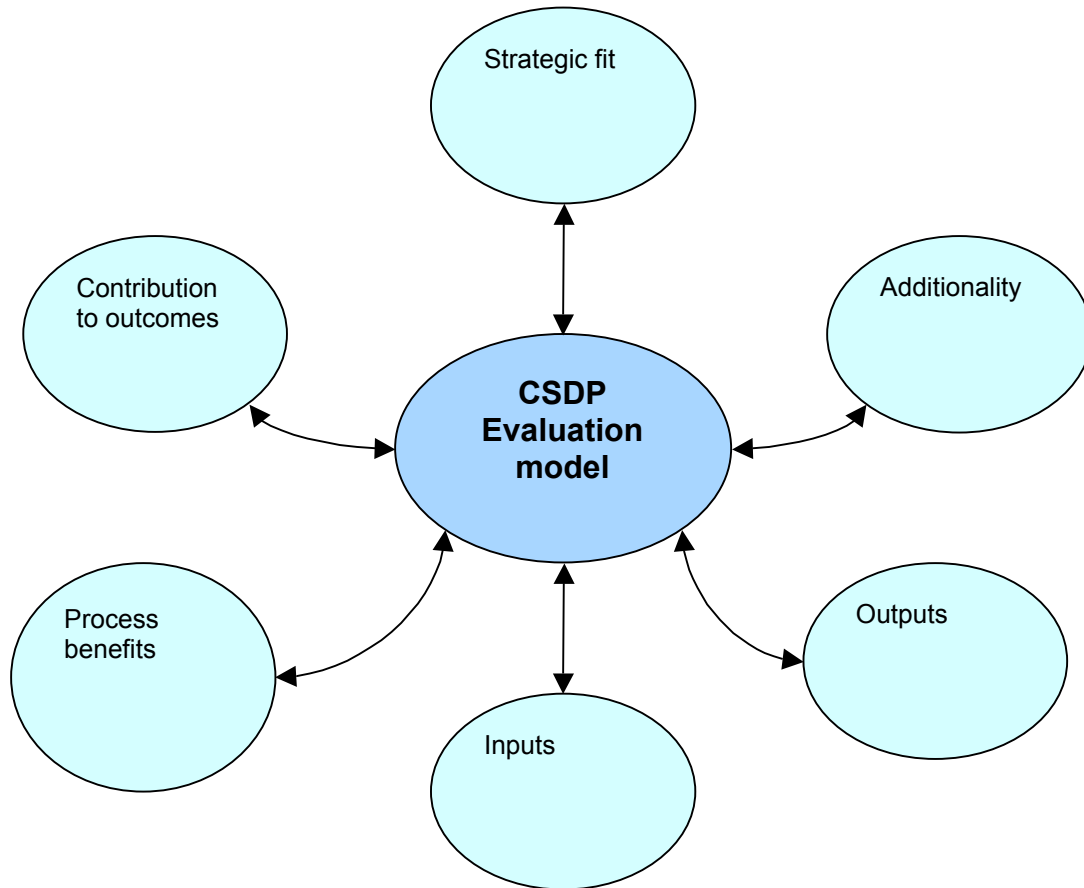
<b>Feature of effective practice in project management</b>	<b>Clearly evident</b>	<b>Evident to some extent</b>	<b>Not evident</b>	<b>Comment</b>
Service improvement & trouble shooting	✓			created a climate of trust and reliability, which helped to facilitate development work.
Steering (direction)	✓			
<b>Overall Evaluation &amp; review</b>				
3 <sup>rd</sup> party review	✓			Reviews of activities, extensive
Peer to peer review			✓	Little evidence of this

**Activity evaluation and monitoring**

<b>Aspect of system</b>	<b>Strengths</b>	<b>Shortcomings</b>
SRB activity monitoring	Exemplary administration of SRB monitoring	
Activity write ups	Reviews of activities written up by activity managers and put onto www site.	

## Section 4 Value for money Assessment

The value for money assessment is based on the CSDP evaluation policy (see in appendices), which in turn is based on industry standard practice in relating output related assessments of vfm with outcome planning.



As such, the assessment takes into account the:

- 6 dimensions of vfm
- Outputs overall from the scheme as a whole, in relation to resources
- Outputs by project<sup>6</sup>, in relation to resources

The assessment is based on the 4 projects that have been appraised in the form of their original proposals and recently recorded outturn.

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<sup>6</sup> Remember the extraordinary way in which projects have been defined under this scheme, and how the activities flow into, and derive from the four projects

**Headline findings – scheme wide**

<p>Strategic fit &amp; effectiveness</p>	<p>A very close strategic fit has been achieved between the priorities of the scheme and its activities. The fit was not automatic – and has involved adapting the activities over the years.</p> <p>The four project structure, and the business planning process enabled some degree of adaptation year on year to help ensure that the fit improved, and changed (according to circumstance).</p>
<p>Process benefits</p>	<p>The process benefits (on the evidence of the feedback from partners) have been considerable, in two main respects.</p> <p>Firstly, the experience of working within the planning and delivery framework of the CSDP was productive and instructive. The approach led to productive changes in how CSDP funded services were designed and delivered.</p> <p>Secondly, much of the investment (in professional development and infrastructure, especially) has helped to support changes in professional practice within the delivery partners that will continue to have sustainable benefits in the future.</p> <p>At the level of individual experience of involvement in the CSDP, a significant number of those involved in the business planning and activity management, have provided evidence that they learnt from the experience, and changed their own practice for the better.</p>
<p>Outputs</p>	<p>All of the outputs have been achieved against the profile.</p> <p>This was not achieved by the targets being unrealistic, or under ambitious. All of the interviewees involved in the original target setting have made clear that there was a rigorous and stretching process worked through as part of the original bidding.</p> <p>Furthermore, the annual business planning and the</p>

	quarterly re-profiling meant that <i>active targeting</i> was maintained throughout the scheme.
Inputs	<p>In relation to the outputs, the inputs have been efficient. Wastage seems to have been minimal, and the administrative / management costs have been very low.</p> <p>The focus on investment in development (of capacity and infrastructure, planning mechanisms, understanding etc) has been consistently high.</p>
Costs per unit of output	Based on the average this has been very good value for money.
Comment on additionality	<p>In very many respects, the CSDP has clearly been additional. In some instances – especially in the work with adults – the additionality has been absolute. This is also the case in many of the professional development and infrastructure investments.</p> <p>It is highly unlikely that the infrastructure developed within the voluntary sector, and (with LSC / Business Link) for employers/ees, would have happened at all, without CSDP investment.</p> <p>In the case of service activities, especially pre – 16, the CSDP investment has influenced the timing (in bringing activity forward), the scale (in ensuring, for example, that <i>all schools</i> could participate), and the quality.</p>

## Value for money commentary

Name of project	Company formation and management (Core Skills CS1)		
Objectives	<ul style="list-style-type: none"> <li>- To establish the legal entity controlled by the partnership, but separate from the operations of any of the partners.</li> <li>- The company was charged with the delivery of the Core Skills Strategy Development.</li> <li>- The company worked with key intermediary organisations and established networks, in order to negotiate the development of the range of projects needed to effectively secure the required outputs and milestones.</li> </ul>		
Indicative activities	<ul style="list-style-type: none"> <li>- Development of strategy and its (periodic) revision</li> <li>- Servicing the Board</li> <li>- Set up and maintenance of Executive Group</li> <li>- Management and direction of secondments</li> <li>- Design of the development framework</li> <li>- Development of programme development and management systems</li> <li>- Development of baselines</li> <li>- Evaluation (scheme-wide)</li> <li>- Scheme-wide networking</li> <li>- National networking</li> </ul>		
Strategic fit & effectiveness	Emergent	Established	Advanced ✓
	Extensive strategic fit. This project was the mechanism through which the strategy was steered and implemented.		
Process benefits	<p>Implementation of the development framework</p> <p>Modeling of the values of the partnership</p> <p>Embedding of those values in practice</p>		
Outputs	<p>10 fte jobs profiled. Achieved: 41 created, a proportion of them long term. (Under CS1 2 jobs were created; under CS2 36 were created; under CS3 3 were created). 2 of the jobs were administrative; 39 of them were developmental.</p> <p>1 new company established</p> <p>7 annual business plans</p>		

<b>Name of project</b>	<b>Company formation and management (Core Skills CS1)</b>
	Strategy / ies Management systems and related monitoring benefits
Inputs	£689000 over 7 years  The value of secondments, management time and of Board resources are difficult to estimate with any accuracy. It is clear, however, that part of what enabled the CSDP to make such an assured start was the involvement of personnel from partner organisations (in advance of the decision to fund), the use of existing back office systems for the partnership's financial and contractual administration.
Costs per unit of output	Misleading to try and assess.  As a % of the overall scheme resources, however, the costs of this project as a proportion of the whole is clearly very low.
Comment on additionality	Appears to be very high, if not absolute.  In the assessment of the partners, the CSDP could not have achieved either the outputs or contribution to outcomes without this project.

Name of project	Identification of working network and programme priorities for schools, parents, voluntary and community sectors (Core Skills CS2)		
Objectives	<ul style="list-style-type: none"> <li>- Targeting voluntary and community sectors, children (aged 0-5) and of school age, their parents and seeks to:</li> <li>- Raise baseline standards of preschool children on entry into school</li> <li>- Raise the literacy and numeracy standards of pupils at KS1, KS2, and GCSE</li> <li>- Engage parents in the support of their children's literacy, numeracy &amp; communication skills development</li> <li>- Release the commitment of parents as volunteers</li> <li>- Improve the infrastructure of practices in schools and supplementary schools</li> <li>- Enhance the potential of voluntary and community organisations</li> <li>- Increase the participation of people with low core skills levels in voluntary and community activity</li> <li>- Increase the commitment of individuals to invest in their own core skills development</li> </ul>		
Indicative activities	<ul style="list-style-type: none"> <li>- Development of operating framework</li> <li>- Development of networks and joint arrangement for project (activity) development</li> <li>- Commissioning of extensive annual activity jointly with partners.</li> </ul>		
Strategic fit & effectiveness	Emergent	Established	Advanced ✓
	Very close strategic fit.		
Process benefits	<p>Sustained involvement of schools, parents and voluntary organisations over 7 years; involvement likely to be sustained for the foreseeable future.</p> <p>Involving all schools in Birmingham (in one activity or another)</p>		
Outputs	Type <sup>7</sup>	Projected	Actual
	1B	130500	193851
	1J	12250	30088
	1N	55750	80647

<sup>7</sup> See appendix for explanation of the output codes – national and locally devised

Name of project	Identification of working network and programme priorities for schools, parents, voluntary and community sectors (Core Skills CS2)		
	1P	350	461
	1kiii	3500	3510
	8Ai	70	178
	8Aii	40	73
	8c	2110	3331
		204570	312139
Inputs	<p>SRB: £779600 (capital) £15846000 (revenue)</p> <p>Local Authority match £1400000 (revenue)</p> <p>GEST<sup>8</sup> £270000</p> <p>Other public funding £31000</p> <p>Private sector funding £45000</p> <p>Total: £18371600</p>		
Costs per unit of output	<p>Estimated in the original project appraisal to be £80.64 per output. Claimed that this establishes a standard.</p> <p>Calculation based on – total funds ÷ total outputs. Undifferentiating the relative costs of different outputs.</p>		
Comment on additionality	<p>High, but not absolute.</p> <p>Clear value – added (both in work instigated by the CSDP during years 1-3, and subsequently in complementing the introduction of national initiatives).</p> <p>Strong evidence of process and systems' change within delivery systems.</p>		

<sup>8</sup> Grants for Education Support and Training

<b>Name of project</b>	<b>Identification of working network and programme priorities for schools, parents, voluntary and community sectors (Core Skills CS2)</b>
	Strong evidence of contribution of CSDP activity in improving baselines, and schools' achievement. Probability that the <i>rate of improvement</i> , rather than the scale of improvement is more directly attributable to the CSDP.

<b>Name of project</b>	<b>Refocusing of Post Compulsory education and training and development programmes to enhance core skills components (Core Skills CS3)</b>		
Objectives	<ul style="list-style-type: none"> <li>- The project targeted employed and unemployed adults within all forms of post compulsory education and training and aimed to:</li> <li>- Enhance the core skills content of existing education and training programmes in post – compulsory education and training</li> <li>- Establish new curriculum and staff development tools</li> <li>- Extend networks and partnerships between education &amp; training organisations</li> <li>- Release the commitment of adult volunteers in relation to core skills enhancement of adult learners</li> <li>- Raise the core skill levels of unemployed and employed adults</li> </ul>		
Indicative activities	<ul style="list-style-type: none"> <li>- Identify elements of best practice</li> <li>- Establish demonstration models</li> <li>- Test out the effectiveness of different approaches</li> <li>- Establish a series of network development planning meetings across different agencies</li> <li>- Establish new cross - agency staff training programmes</li> </ul>		
Strategic fit & effectiveness	Emergent	Established ✓	Advanced ✓
	<p>High strategic fit, mid way between established and advanced.</p> <p>Significant recent strategy and development work through the CSDP leadership of the Adult Basic Skills Review.</p> <p>Developing the conceptual framework for inclusion of basic skills agenda in the flourishing neighbourhoods'</p>		

<b>Name of project</b>	<b>Refocusing of Post Compulsory education and training and development programmes to enhance core skills components (Core Skills CS3)</b>		
	developments in Birmingham (ie. 'What might a floor target look like for basic skills..')		
Process benefits	Secured role of CSDP with the LSC, in leading the thinking on basic skills with adults.  Helped prepare partners and practitioners in Birmingham to be a national pathfinder for the Skills for Life.		
Outputs	Type	Projected	Actual
	1C	19000	27681
	1E	28000	64498
	1Fi	1620	3800
	1Fii	1620	3800
	1Aii	21000	21180
		71240	120959
Inputs	SRB  £10545400  TEC (public)  £4795000  FEFC  £1370000  ESF  £560000  Total public £17270400  Private (TEC) £1390000  Total funding £18660400		
Costs per unit of output	Estimated in the original project appraisal to be £148.03 per output. Claimed that this establishes a standard. Calculation based on – total funds ÷ total outputs.		

<b>Name of project</b>	<b>Refocusing of Post Compulsory education and training and development programmes to enhance core skills components (Core Skills CS3)</b>
	Undifferentiating the relative costs of different outputs.  The standard was used as the benchmark against which individual activity proposals were assessed for net cost per unit of output.
Comment on additionality	High, but not absolute.  Clear value – added (both in work instigated by the CSDP during years 1-3, and subsequently in complementing the introduction of national initiatives).  Strong evidence of process and systems' change within delivery systems.

<b>Name of project</b>	<b>Engagement of business in core skills developments (Core Skills CS4)</b>
Objectives	<ul style="list-style-type: none"> <li>- This project targeted employers, employees and those organisations representing the interests of these groups and aimed to:</li> <li>- Advise businesses on Core Skills Developments and competitiveness</li> <li>- Establish employee development schemes to enhance the core skills levels of employees</li> <li>- Release the commitment the commitment of employees to undertake voluntary work in schools, or elsewhere, related to raising levels of core skills</li> <li>- Engage employers in collaborative schemes to foster the development of literacy, numeracy and communication skills</li> </ul>
Indicative activities	<ul style="list-style-type: none"> <li>- Identify elements of best practice</li> <li>- Establish demonstration models</li> <li>- Test out the effectiveness of different approaches</li> <li>- Establish a series of network development planning meetings across different agencies</li> <li>- Identify the range of employer activity (re employee development) and establish a Development Plan</li> <li>- Work with employees' representatives as well as employers</li> <li>- Establish a number of new work – based schemes</li> </ul>

Name of project	Engagement of business in core skills developments (Core Skills CS4)		
Strategic fit & effectiveness	Emergent	Established ✓	Advanced
	<p>This was the project on which the CSDP made the slowest progress in the first 4 years.</p> <p>In the last 3 years more progress has been made with the development of delivery models that engage with Business Link and the LSC work based learning structures.</p> <p>The development of interest within public sector organisations has also been very significant, in their role as major employers.</p>		
Process benefits	<p>The Basic Skills Review for Birmingham has clear implications for this area of policy. The 'modernising' of the view of basic skills could have far reaching consequences for the labour force.</p> <p>The delivery infrastructure for business and work force development now has basic skills assessment and support built into its diagnostic systems.</p> <p>Accurate baseline assessment of need is now possible across the employment base in Birmingham.</p>		
Outputs	Type	Projected	Actual
	1Ki	370	373
	1kii	3950	3950
	2D	1010	1324
	8D	370	390
	8C	490	490
Inputs	SRB £530000		
Costs per unit of output	<p>Estimated in the original project appraisal to be £85.62 per output. Claimed that this establishes a standard. Calculation based on – total funds ÷ total outputs. Undifferentiating the relative costs of different outputs.</p> <p>The standard was used as the benchmark against which individual activity proposals were assessed for net cost per unit of output.</p>		
Comment on	Judged to be high, but not absolute.		

<b>Name of project</b>	<b>Engagement of business in core skills developments (Core Skills CS4)</b>
additionality	<p>The CSDP contributed to the development of the agenda between Business Link and the LSC.</p> <p>Engagement with Trades' Unions and the advocacy of basic skills a development priority with public sector employers has been significant.</p> <p>Recent development of interest in the Health Sector in core &amp; basic skills as a driver of health outcomes is a characteristic example (where CSDP has been able to capitalise on a policy development, driven by other considerations.)</p>

### **Scheme wide outputs**

The tables that follow provide a summary of the scheme – wide achievement of outputs, and throughputs. In every instance that has been tracked for SRB purposes, the scheme

- Increased its target outputs between the bid stage and profiled delivery plan stage
- Exceeded the bid expectations
- Exceeded the delivery plan profile

<b>Through put / Output</b>	<b>7 year expectation (original bid)</b>	<b>7 year target (delivery plan profile)</b>	<b>7 year achievement</b>	<b>% achieved against bid</b>
SRB spend	£28600000	£28600000	£28599999	100%
Jobs safeguarded	21000 (4200)	21000 (4200)	21180 (4480)	101% (106%)
Training weeks	28000 (-)	31100	64498	230%
Unemployed into jobs	1620 (324)	3745 (1412)	3800 (1404)	235% (433%)
Young people benefiting	12250 (3675)	25277 (8118)	30088 (9488)	246% (258%)
Pupils benefiting	130500 (45675)	147383 (57063)	193851 (77907)	149% (171%)
Adults gaining qualifications	19000 (3800)	19402 (3947)	27681 (12066)	146% (318%)
Businesses advised	1100 (-)	1104	1324	120%
Voluntary / community groups benefiting	110 (55)	251 (74)	323 (89)	294% (162%)
New volunteers	2600 (200)	2687 (543)	3331 (734)	128% (367%)
Parents assisted	55750 (13938)	73747 (25920)	80647 (36347)	145% (261%)
Schools benefiting	350 (-)	461 <sup>9</sup>	461	132%

<sup>9</sup> This represents all of the schools in Birmingham (78 secondary, 322 primary, 25 nurseries, and 36 special schools)

<b>Throughput / Output</b>	<b>% achieved against bid</b>	<b>Commentary Explanations</b>
SRB spend	100%	<ul style="list-style-type: none"> <li>- Efficient programme management</li> <li>- Consequence of the business plan and commissioning approach</li> </ul>
Jobs safeguarded	101% (106%)	<ul style="list-style-type: none"> <li>- Model shifted from working with few employees per company to whole company training needs analysis – unlocking large numbers per company</li> </ul>
Training weeks	230%	<ul style="list-style-type: none"> <li>- Reflects the large emphasis put on staff training; training service deliverers; extending/enhancing existing programmes</li> </ul>
Unemployed into jobs	235% (433%)	<ul style="list-style-type: none"> <li>- Working through TEC/ES/JC+ systems to ensure that employability-related 'work skills' (literacy/numeracy) were boosted in programmes for large numbers (e.g. New Deal)</li> </ul>
Young people benefiting	246% (258%)	<ul style="list-style-type: none"> <li>- Creating routes between communities of young people and library service/youth service – with focused expectations about 'more, new young people'</li> </ul>
Pupils benefiting	149% (171%)	<ul style="list-style-type: none"> <li>- Working in systemic ways with large numbers of schools</li> </ul>
Adults gaining qualifications	146% (318%)	<ul style="list-style-type: none"> <li>- Improving the communication/number underpinnings needed to succeed at accreditation</li> </ul>
Businesses advised	120%	<ul style="list-style-type: none"> <li>- Large scale briefings and creating a new business service via LSC/Business Link etc</li> </ul>
Voluntary / community groups benefiting	294% (162%)	<ul style="list-style-type: none"> <li>- Working with BVSC existing networks, and extending the reach of these</li> <li>- Working via key intermediaries</li> </ul>
New volunteers	128% (367%)	<ul style="list-style-type: none"> <li>• Working via BVSC voluntary system and refocusing on adult volunteers. Supporting 2 national voluntary organisations to establish work in Birmingham.</li> </ul>
Parents assisted	145% (261%)	<ul style="list-style-type: none"> <li>• Cost effective delivery of Bookstart model to large numbers of parents/year and use of cost effective Inspire model in first 2 years).</li> </ul>
Schools benefiting	132%	<ul style="list-style-type: none"> <li>• CSDP resources able to complement those of (for example) the standards fund.</li> <li>• Deliberate strategy to engage with the 'whole system'</li> </ul>

## **How the targets were set**

There were some under - pinning principles that defined the ways in which the outputs for the scheme would be treated.

- There would be activity and outputs on all fronts, across all years – but with an early emphasis on
  - CS1 – creating a company
  - CS2 – work with pre school, schools, pupils, parents (including more volunteers helping in schools etc)
  - and a later emphasis on
  - CS3/4 – work on transition (14-19); youth and adult training programmes; with businesses
- The numerical outputs would have to be real (i.e. rooted in specific real activity e.g. parents = Bookstart) rather than ‘hoped for’
- The outputs would need to be achievable (i.e. not so high as to be unattainable; nor profiled nonsensically across years)
- The outputs would always be set at the upper maximum (or just beyond) of any range i.e. the scale of outputs would itself be a driver/supporter of the need to have multiplier activity, whole system activity (none would be achievable through small scale projects)
- The outputs would clearly relate to distinct areas of work i.e. (since each output could be counted only once) so that we wouldn’t need to set up costly beneficiary tracking mechanisms to ensure that e.g. within CS2 we never counted the same person twice. This would inevitably mean that there would be more (uncounted) beneficiaries than those robustly put forward as outputs. The CSDP relied on the tracking systems that its partners’ use for their contract delivery as the mechanism for monitoring this activity. This mean that there could be scheme wide monitoring and tracking without the CSDP having to invest in the overhead needed to establish and maintain this.

## **Statistical neighbours and core cities**

The CSDP – in part – benchmarked itself against the core city<sup>10</sup> comparators for GCSE attainment, and for a group of “statistical neighbours”<sup>11</sup>. Partners made clear in their discussions that there was no absolute, direct causal link between the CSDP activities and outcomes, and the changes in the relative position of Birmingham at key stages and GCSE. It was widely accepted that many of the changes in practice, and investment in infrastructure which the CSDP encouraged, were significant contributors to the changes in relative performance (for example, in conjunction with the standards’ fund.)

The latest comparison for 5A\*- C GCSEs, in 2003 are:

Birmingham	50%
Wolverhampton	45%
Leeds	44%
Sheffield	43%
Liverpool	41%
Newcastle	40%
Manchester	39%

In 1993, the national gap between Birmingham and the national average was 14%. In 2003, the national gap is 3%.

The main message from recent comparative assessments (shown in the table that follows) is that the relative position in Birmingham is poor at KS1, but relatively better at GCSE. By implication, therefore, the experience of working through the system is relatively effective (by comparison with the core city and statistical neighbour comparators) in helping children improve their attainment.

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<sup>10</sup> Core City comparators are against Leeds, Sheffield, Manchester, Liverpool, Newcastle upon Tyne and Liverpool.

<sup>11</sup> The statistical neighbours are Liverpool, Walsall, Sandwell, Wolverhampton, Bradford, Blackburn & Darwen, Luton, Rochdale, Oldham and Nottingham.

Phase	Birmingham	Core City Average	Statistical Neighbour Average	Birmingham Rank Order (out of 16)
<b>2002 KS 1 (Level 2+)</b>				
Reading	80%	81%	80%	11 <sup>th</sup>
Writing	83%	82%	82%	7 <sup>th</sup>
Mathematics	87%	88%	87%	11 <sup>th</sup>
<b>2002 KS2 (Level 4+)</b>				
English	70%	68%	68%	5 <sup>th</sup>
Maths	70%	69%	68%	5 <sup>th</sup>
Science	84%	83%	82%	2 <sup>nd</sup>
<b>2002 KS3 (Level 5+)</b>				
English	60%	59%	58%	5 <sup>th</sup>
Mathematics	58%	57%	57%	8 <sup>th</sup>
Science	56%	55%	55%	5 <sup>th</sup>
<b>2001 GCSE / GNVQ</b>				
5A* - C	41%	37%	38%	3 <sup>rd</sup>
1A* - G	94%	92%	93%	2 <sup>nd</sup>
Point score	36	32.6	33.3	4 <sup>th</sup>

### Further assessment against objectives

A major strand of the Vfm policy includes assessment of progress against objectives, and related impact / outcomes. The objectives of the scheme as a whole, are expressed through the objectives of the four underlying strategic projects. Therefore, this sub section provides a commentary on the extent to which objectives have been achieved.

The sources of evidence for the commentary include:

- Outputs
- Outcomes (changes in the baseline during the period of the scheme)
- Partners' assessment of the progress against objectives

Project One – Objectives	Commentary
<p>To establish the legal entity controlled by the partnership, but separate from the operations of any of the partners.</p> <p>The company was charged with the delivery of the Core Skills Strategy Development.</p> <p>The company worked with key intermediary organisations and established networks, in order to negotiate the development of the range of projects needed to effectively secure the required outputs and milestones.</p>	<p><i>Achieved entirely.</i> Plans now in hand to wind up the company and establish terms of reference for the CSDP as a partnership.</p> <p><i>Achieved entirely.</i></p> <p><i>Achieved entirely</i> (as far as the SRB scheme is concerned)</p>

Project Two – Objectives	Commentary
<p>Targeting voluntary and community sectors, children (aged 0-5) and of school age, their parents and seeks to:</p> <ul style="list-style-type: none"> <li>- Raise baseline standards of preschool children on entry into school</li> <li>- Raise the literacy and numeracy standards of pupils at KS1, KS2, and GCSE</li> <li>- Engage parents in the support of their children’s literacy, numeracy &amp; communication skills development</li> <li>- Release the commitment of parents as volunteers</li> </ul> <p>Improve the infrastructure of practices in schools and supplementary schools</p> <p>Enhance the potential of voluntary and community organisations</p>	<p><i>Achieved</i></p> <p><i>Achieved</i></p> <p><i>Achieved</i></p> <p><i>Achieved</i></p> <p><i>Achieved</i></p> <p><i>Achieved</i></p>

<b>Project Two – Objectives</b>	<b>Commentary</b>
Increase the participation of people with low core skills levels in voluntary and community activity	<i>Achieved</i>
Increase the commitment of individuals to invest in their own core skills development	<i>Achieved, on the basis of subsets of the target groups (for example, young people using libraries in their own time; volunteers involved in literacy &amp; numeracy support)</i>

<b>Project Three – Objectives</b>	<b>Commentary</b>
The project targeted employed and unemployed adults within all forms of post compulsory education and training and aimed to:	
Enhance the core skills content of existing education and training programmes in post – compulsory education and training	<i>Achieved</i>
Establish new curriculum and staff development tools	<i>Achieved</i>
Extend networks and partnerships between education & training organisations	<i>Achieved</i>
Release the commitment of adult volunteers in relation to core skills enhancement of adult learners	<i>Achieved</i>
Raise the core skill levels of unemployed and employed adults	<i>Achieved on the basis of literacy and numeracy work acting a preventative measure to safeguard employability, especially for people in work in sectors at risk of decline.</i>

Project Four – Objectives	Commentary
This project targeted employers, employees and those organisations representing the interests of these groups and aimed to:	
Advise businesses on Core Skills Developments and competitiveness	<i>Achieved</i>
Establish employee development schemes to enhance the core skills levels of employees	<i>Achieved</i>
Release the commitment of employees to undertake voluntary work in schools, or elsewhere, related to raising levels of core skills	<i>Achieved</i>
Engage employers in collaborative schemes to foster the development of literacy, numeracy and communication skills	<i>Achieved</i>

## **Appendices**

In the appendices, we have details of:

Interviewees

Topic guide

Vfm policy

Notes on analysis of comparators

Timeline of key incidents

Output distribution by project

## **Interviewees**

<b>Name</b>	<b>Organisation</b>
Geoff Bateson	Director CSDP
<b>Partners and Board members</b>	
Tracey Lawton	Library Service
Jag Dayu & Julie Beattie	Education Dept Finance
Seamus Gaynor	Education Dept Policy Development
Terry Johnson	Education Dept BASS
Caroline Haines	LSC
Margot Clements	External consultant
Sue Henderson	Regional Co-ordinator Adult Basic Skills Strategy Unit GOWM
Jane Slowey	BVSC, Chair
Mike Bell	Connexions
Denise Barrett & Joy Cahill	EDD , accountable body
David Cragg	LSC
Tim Brighthouse	LEA
Adnan Siaf	AWM (srb 2)
Mark Eaves	AWM Skills Team
<b>Activity managers</b>	
Yvonne Burt	Library Service
Beryl Bateson	LEA
Helen O'Brien	Library Service
Brian Wardle & Les Booth	LEA
Alan Tarpey	LEA
Helen Thomas	Private company

## Topic guide for interviews

### Background

GFA Consulting have been commissioned by the Core Skills Development Partnership to complete a programme of evaluation work. This evaluation activity builds on what has gone before, but has a particular emphasis on assessing Value for Money and the lessons learned from the Core Skills Partnership experience.

Someone from GfA Consulting (Andrew Harrison or Peter Paisley) will be contacting a range of people who have been involved:  
in the 'mechanics' of the Partnership's activities  
in managing development activities  
in bringing a range of developments together across one partner  
in senior manager/Board member decisions about overall direction  
in ensuring links to wider policies and strategies.

You may be contacted as a person who has had involvement with the Partnership in one or more of the above ways. It is hoped that, if contacted, you will contribute to this important piece of evaluation (which is needed to complete our commitments re SRB requirements).

The objectives of this final piece of evaluation activity are:

- To augment evaluation work that has been undertaken to date
- To assess the Value for Money of business plan activities and the scheme overall
- To explore the evidence of what works in the Core Skills Partnership approach to changing main stream practice
- To distil a set of lessons for the wider dissemination of effective practice

### Structure of the evaluation activities

There are 3 strands to this evaluation work. These are:

Strand of evaluation	Tasks
Activity assessment of Value for Money	<ul style="list-style-type: none"><li>• Discussions with project activity managers</li><li>• Review of secondary materials (appraisal documents and monitoring reports)</li><li>• Comparative assessment with other activities and schemes from elsewhere</li></ul>
Scheme assessment of Value for Money	<ul style="list-style-type: none"><li>• Discussions with members of the Board of the Partnership and senior managers within partners</li><li>• Assessment of plans</li></ul>

	<ul style="list-style-type: none"> <li>• Comparative assessment against other schemes with comparable objectives and business processes</li> </ul>
Development of a 'how to' guide	<ul style="list-style-type: none"> <li>• Discussions with cross section of activity managers, Board members and senior managers</li> <li>• Case study development</li> <li>• Review of the activity "write ups"</li> </ul>

### Interview topic guides

Under each of the strands there are a set of generic issues, and a set of strand-specific issues that we aim to explore. These will be explored in discussion, so please treat these questions as prompts for your thoughts and contribution.

#### Value for Money

We are assessing Value for Money on five related criteria. These are:

**Inputs:** what have been the human and financial resources required to implement the activity, and the scheme more widely?

**Processes:** has there anything about *the way* that activities and the scheme as a whole have been implemented that has added value (in the light of the Core Skills Development Partnership objectives)? To what extent do you expect the process benefits to become more evident over time?

**Benefits:** what have been the outcomes and impacts that the activities (and scheme as a whole) have delivered? What do you expect to be the eventual out turn? To what extent is it possible to analyse the qualitative benefits?

**Efficiency:** have the activities (and scheme as a whole) been cost-effective, or could the Partnership have achieved the same outputs (and impact) for less?

**Effectiveness:** to what extent do the sets of activities contribute to Core Skills Development Partnership's overall objectives?

#### Lessons in 'how to'

- Try to recall your state of expectations when setting out on involvement in the Core Skills Development Partnership activity / scheme. Please consider:
- What did you expect to be the impact of the scheme / activity in which you were involved?
- What happened in fact? What was the difference (if any) between what you expected and what happened?
- How do you explain any difference between what was expected and what actually happened?
- What have you learnt from the activity / scheme involvement that you have had?

### **Influencing the mainstream**

On the face of it, the Core Skills Development Partnership has “influenced” the mainstream in Birmingham. At the very least, its business plan and development framework have helped to prepare partners in Birmingham for developments in national policy (on core and basic skills).

What is your assessment of the Partnership’s from this point of view? What have been the strengths and weaknesses of the following aspects of planning and management at either /both and activity level or for the scheme as a whole:

- Planning for outcomes
- Reporting and co-ordination
- Partnership leadership and direction
- Use of time-limited resources in relation to “mainstream” resources
- Culture change, both of practice and of systems
- Anything else that’s relevant...

### **Contact**

It is hoped that people to be interviewed will be contacted within the next few days. In the meantime if you want any further information on this evaluation activity please contact:

Geoff Bateson  
Core Skills Development Partnership

248 8083  
[geoff@coreskills.co.uk](mailto:geoff@coreskills.co.uk)

Andrew Harrison  
GFA Consulting

242 3858  
[andrew.harrison@gfa.co.uk](mailto:andrew.harrison@gfa.co.uk)

## Value for money policy

### Core Skills Partnership: Policy on Value for Money

This note is designed to provide a basis for agreeing the approach to the assessment of VfM for activities. It takes into account several related issues:

- The treatment of VfM in the guidance for SRB schemes produced by the DTLR (dealing with appraisal and evaluation);
- The balance between efficiency and effectiveness; and
- The strategic objectives and development framework of the Core Skills Development Partnership (especially its focus on outcomes, rather than outputs).

Drawing on the Unified Appraisal Guidance (DTLR October 2000), we can perhaps identify seven sets of analysis that need to be undertaken to help provide that answer:

- Options: what are the options (the different activities) by which we could address this issue?
- Inputs: what resources will it require (human as well as financial) for the project to be implemented?
- Processes: is there anything about the way the project will be implemented that adds value and needs to be reflected in a VfM assessment?
- Benefits: what are the outputs and outcomes that this project is expected to achieve?
- Additionality: what additional impact is the project delivering over an above what would have been achieved with no additional intervention?
- Efficiency: is the project cost-effective or could we secure the same outputs for less?
- Effectiveness: does the project genuinely contribute to our overall objectives?

The Unified Appraisal Guidance assumes that the process of appraisal is always conducted comparatively. The principle of comparative analysis applies to each aspect of the VfM where it is possible to provide evidence of reliable comparators.

### Options

We aim to distinguish between two levels at which options appraisal needs to take place:

- The *'big picture' or strategic level*: what is the range of things we could do to deal with this problem? This takes place as part of the annual business planning process;
- *Project-based* options appraisal — once we have decided on the broad approach, what are the various options for implementation?

The key questions are:

- What's the problem we are trying to tackle?
- What are the consequences if we do nothing about it?
- What are the different things we could do?
- What justifies the option we've chosen?

Section 5.16 in the DTLR Unified Guidance sets out how the department expects the process to work.

#### **Options appraisal**

- weigh up alternative ways of meeting objectives,
- think of as wide a range of options as possible;
- review and challenge these options and assess:
  - whether sufficient demand exists
  - whether they are feasible, and can be delivered
  - in very broad terms their costs and benefits
  - whether the proposed delivery mechanism is the appropriate one
  - how else the proposal might be funded
- identify a short list of realistic options for further appraisal. "We will expect you to provide a brief written assessment of each realistic option in your project appraisal."

There is now an expectation that there should be some kind of options appraisal for every project, involving the following questions:

- was doing nothing an option?
- was this scale needed?
- were there different ways of delivering?
- were all the elements of the proposal needed?
- could this idea have been combined with other projects?
- were there alternative funding packages available - could some one else have paid for it?

#### **Inputs**

Put simply, the judgement about whether a project offers VfM involves asking whether the expected benefits justify the costs (taking into account the issues to

do with additionality). As with any other kind of investment, if the finances do not stack up, it's unlikely the project as a whole will succeed. There are two key dimensions to the financial analysis of projects seeking regeneration funding:

- What will the project cost?
- How will it be paid for?

### **Costs**

Early appraisal guidance (prepared for example for City Challenge) stressed the importance of a rigorous analysis of costs, to ensure that unit prices were reasonable. The new guidance from the DTLR is more sophisticated in its approach to VfM, but it is still vital to make sure that the costs contained within a funding bid are justified. There are perhaps three sets of issues to be addressed:

- *Identifying the cost elements:*
  - Were all items of cost identified?
  - Were all costs necessary to the effective implementation of the project?
  - Were there any key items that have been over looked?
- *Estimating actual costs for each item:* key questions to ask include:
  - Was the basis for the estimate been made clear? Was provision been made for inflation (for example wage increases for project staff)?
  - Did the profiling of costs over the project lifetime make sense, or were there problems (for example cash flow)?
- *Were the costs reasonable – making comparisons:*
  - Were there cost norms for this type of expenditure - for example through professional publications?
  - Was it appropriate to use competitive tendering?
  - What data was there (or could there have been) to provide evidence of comparisons?

Comparative data are important to allow judgments about VfM to be made; however, from experience, problems of costings are more likely to arise from overlooked items than overpriced ones.

### **Sources**

The unified guidance insists that appraisals should indicate all other sources of funding in addition to SRB grant. The critical questions to be answered include:

- What was the status of contributions expected from other partners?
- What is the value of private sector leverage? For the SRB as a whole (nationally), the average value of private leverage is about 2:1.

- Are contributions from other public sector bodies genuinely additional — is there real leverage or are these ‘complementary’ to SRB expenditure? The appraisal needs to distinguish clearly between the two.

Although this was not a feature of guidance at the time when many Core Skills Development Partnership activities were approved, the development framework places a high priority on what the guidance now calls “bending mainstream programmes”. However, as the guidance says, “Bending main programme support is not the same as ‘match funding’, attracting new money into the area to support your scheme or project.”

- Shortfalls: were the contributions identified sufficient to meet all costs — and if not how were gaps covered?
- Income: where relevant, were estimates of earned income realistic?
- In-kind contribution: was the value of contributions in kind properly costed, particularly where it is being used as match against other public funds.

### **Processes**

The principle benefits of regeneration funding should emerge as identifiable changes within the area (the impact or outcomes), and the outputs that are needed to secure them. But there may be some elements of the process or operational dimension of the project which need to be taken into account in assessing value for money. Some examples include:

- *Innovation*: is this project testing out a new approach to tackling a problem that may justify apparently high costs?
- *Demonstration project or pilot*: SRB funds are often used to support pilot or demonstration projects, since main programme budgets often lack sufficient flexibility to pay for experiments. So it’s vital that, if something is called a ‘demonstration project’ there is a clear...
  - *dissemination strategy*: was it clear how messages were to be properly captured and communicated;
  - *Influencing key partners*: to what extent was it clear that there were elements of the project activity designed to influence the actions of key partners;
  - *Capacity building*: finally, was there clear provision for costs incurred within the project because of an important capacity building dimension?

### **Benefits**

Until recently, partnerships’ performance has been assessed on the extent to which forecast output targets are achieved. This started to change with NDC, with its emphasis on outcomes, and from now on, the key issue for SRB partnerships will be the extent to which schemes have achieved outcome targets.

The Development Framework for the Core Skills Development Partnership was “ahead of the game” in this respect.

Nevertheless, from the point of view of internal programme and project management, the identification of project outputs or some other intermediate measures of performance, is still critical, both to ensure that they are realistic and achievable, and that for each project, the maximum *range* is being claimed.

We set out below definitions of the two terms as they appear in the unified appraisal guidance.

***Outputs and outcomes***

***Outputs are: “The physical products or measurable results of individual projects, for example the number of firms assisted and jobs created”***

***Outcomes are: “The wider effects or impact on an area of a scheme or project, for example the reduction in crime level over a set period of time. Outcomes should be measured against defined baselines.”***

Therefore, in assessing the VfM of particular activities, we need to be clear, firstly:

- whether individual projects were expected to achieve *outcomes*, and if so, what; and how the outputs of individual projects were likely to contribute to the outcome targets of the scheme itself; and, secondly
- to what extent were these expectations met.

We will be assessing projects against these good practice principles in Maximising Outputs. To what

extent:

- were output targets realistic and achievable;
- were the maximum, reasonable range of outputs identified; were the assumptions behind this detail spelt out?
- Were outputs linked to outcome targets;
- did implementing organisations understand what’s expected, and its importance to the Partnership;
- did implementing organisations have mechanisms to capture the necessary data;
- were targets for ethnic minority benefits (and other disadvantaged groups) included, in a reasonable and realistic form;
- were appropriate monitoring arrangements in place, and reflected in the contractual agreements between the Core Skills Development Partnership and those delivering activity.

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***Additionality. efficiency and effectiveness***

The concept of additionality is a fundamental principle of public funding: if it doesn't achieve things that would not have happened without it, the investment should not be made. Every project financed through CSPD should offer some kind of additionality. There are various dimensions of additionality - any one of which may be sufficient to justify the VfM of an activity:

- *absolute*: the project would not proceed at all without our funding;
- *timing*: the project may go ahead, but without our funding it will be much later;
- *scale*: the project would be smaller without our support;
- *quality*: our funding will improve the quality of the project;
- *location*: without our funding the project would have happened elsewhere;
- *local benefit*: our funding will increase the range of benefits arising for local people.

In every case, the appraisal for the activity should make clear how projects add value, even if it is not always possible to quantify that added value.

Measuring additionality will involve assessing:

- *leakage*: benefits lost to the target area;
- *deadweight*: things that would have happened anyway, without the project;
- *displacement*: where the project has a detrimental effect on other things going on in the area of policy;
- *substitution*: where an applicant substitutes one activity for another to benefit from this public subsidy;
- *multiplier effects*: the knock-on impact of direct project investment

Finally, to assess the comparative VfM of each of the short-listed options (and each activity) the unified guidance suggests we will need to analyse both their efficiency and effectiveness.

In this context there are technical meanings attached to these terms.

- ***Effectiveness:***

***The extent to which the project has contributed to the overall strategic objectives, development framework and the activity-specific objectives***

- ***Efficiency:***

***The ratio of inputs to outputs/outcomes, or cost effectiveness***

Comparative information drawn from other projects will be especially significant in relation to efficiency.



## Comparator analysis

Part of the methodology for this part of the evaluation was to assess and consider the comparison between the CSDP and other SRB and core skills schemes. 4 comparators were chosen – one being the cluster of SRB schemes in Birmingham under rounds 1, 2, 4, 5, & 6. The other set of comparators being literacy and numeracy schemes in Derbyshire, Bolton and Thanet. The CSDP was directly involved in some aspects of the set-up of the Bolton and Thanet examples.

Schemes	Key features, and background – thumbnail details
SRB schemes in Birmingham	<p>Wide range of schemes – mixing area based approaches and thematic. Some studies have used these schemes as comparators for the CSDP (in the case of the Birmingham City Council Scrutiny<sup>12</sup> report on SRB schemes &amp; job creation). In a similar way the District Auditor used the CSDP as a comparator in a review of 'Managing improvement through partnerships'<sup>13</sup> They cover the period 1995 to now.</p> <p>Most of these involved residents (and project users) in their direction, at Board level. Most of them have independent boards, but are not necessarily constituted. Almost all are area based initiatives (ABIs).</p>
Read on Write Away, Derbyshire	<p>Large scale, multi agency, multi year, multi source funded initiative to transform literacy and numeracy standards in Derbyshire. Established in 1997.</p> <p>Strong commitment to the use of community development working principles in target areas of Derbyshire, Derby City and North Nottinghamshire former coalfields. Active in schools, family learning, mentoring and volunteer recruitment and support. Strong emphasis on developing and promoting effective practice. Both enables &amp; delivers.</p> <p>High profile marketing brand. ROWA! is an experience, a product and a state of mind! At its inception, there was a campaigning purpose, which has continued. Relatively inactive in workforce basic skills, but pioneering in its schools, family and community focused work.</p> <p>Independent organisation, with Derbyshire County</p>

<sup>12</sup> See [www.birmingham.gov.uk](http://www.birmingham.gov.uk), and search under regeneration scrutiny reports.

<sup>13</sup> District Audit 'Managing improvement through partnerships' Miranda Ford

Schemes	Key features, and background – thumbnail details
	<p>Council as it equivalent of an accountable body. More details on activities at: <a href="http://www.rowa.co.uk">http://www.rowa.co.uk</a></p>
Bolton Literacy Trust	<p>Medium scale, recently established SRB funded scheme to improve literacy and numeracy in Bolton. Concentrating on schools and community interventions this stage. Piloting national e learning initiative. No 14-19 role, as yet. Enables activity by others.</p> <p>Grew out of SRB scheme, establishing a charitable trust July 2002. Independent organisation, with local authority providing the equivalent of accountable body functions.</p> <p>More details on activities at: <a href="http://www.boltonliteracytrust.org.uk">http://www.boltonliteracytrust.org.uk</a></p>
Thanet Literacy Project	<p>Launched in 2000, following extensive preparatory work, including the development of a 5 year strategic plan<sup>14</sup>. Small scale resources, some from SRB, children’s fund, ESF. Significant support from Pfiser. Tends to enable activity</p> <p>Local FE College provides accountable body functions.</p>

The templates that follow provide a discussion of some of the key characteristics of the comparators.

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<sup>14</sup> A copy of their strategy can be downloaded from the National Literacy Trust www site, in the section highlighting some examples of cross sector literacy partnerships.  
[www.literacytrust.org.uk](http://www.literacytrust.org.uk)

Dimension of partnership	Evidence from experience elsewhere	Lessons for the Core Skills Development Partnership
Partnership design and make up: positioning	<ul style="list-style-type: none"> <li>- Choices about positioning are far reaching, only partly intentional</li> <li>- Initiatives tend to stay in the position they start off in, unless there is very conscious leadership to re-position</li> <li>- Both strategy and funding security / terms dictate whether the partnership is principally a deliverer or enabler.</li> </ul>	<p>The balance between strategic leadership, credibility and profile is a critical one.</p> <p>The CSDP decided to adopt a relatively low profile. The profile could have been higher, and some of the strategic impacts may have been (thereby) enhanced.</p>
Partnership leadership and direction	<ul style="list-style-type: none"> <li>- In all cases senior leadership was critical.</li> <li>- To some extent the founding leaders were charismatic and dissatisfied with the status quo (in terms of baselines and the supply side culture)</li> <li>- In most cases leadership has been surprisingly enduring and consistent, year on year</li> </ul>	<p>This is a key feature of the culture of the CSDP that needs to be maintained, if updated and adapted.</p> <p>The CSDP needs to ensure involvement of senior leaders, in ways which interest them and ensure that strategic change is the priority.</p>
Planning for outcomes	<ul style="list-style-type: none"> <li>- The structures of the most successful comparators have all been set up outside mainstream agencies, but with the support of the most senior leaders of the mainstream. In effect, the partnerships have been routes for <i>working round and through</i> systems that needed to be improved.</li> <li>- Most operate on a multi activity programming basis, but with poorly defined programme framework.</li> <li>- Few – if any – business plan in the way that the CSDP has developed.</li> </ul>	<p>The lessons for the CSDP – in this respect – are limited.</p> <p>The mechanisms for “planning for outcomes” remain robust and relevant.</p>
Programme resources	<ul style="list-style-type: none"> <li>- More mixed and varied picture against this</li> </ul>	<p>Limited learning for the CSDP against</p>

Dimension of partnership	Evidence from experience elsewhere	Lessons for the Core Skills Development Partnership
and mainstream resources	<p>dimension. All of the partnerships – especially those founded in the past 4 years, make the claim that they are there (in part) to influence the mainstream. Yet planning &amp; design mechanisms; and activities themselves, are tenuously linked to aspiration. This is less true of the basic skills’ comparators than the ABIs.</p> <ul style="list-style-type: none"> <li>- The position during the founding stages is very significant to this dimension of performance. If all parties supported mainstream influencing during the formative stages of the partnership, then it is far more likely to be achieved.</li> </ul>	<p>this dimension, except to observe that the focus on changing mainstream practice, and the focus on involvement of system managers and planners (rather than service users) has fostered progress against this objective.</p>
Culture change: practice and systems	<ul style="list-style-type: none"> <li>- Mixed picture. Not explicitly a priority in many of the comparator cases.</li> <li>- Lots of evidence of ‘maverick’ activity, involving demonstration models and pilot activity. Evidence of leading change within delivery and operating systems slight.</li> </ul>	<p>Again, limited lessons. The “business planning”, “whole systems” approach used by the CSDP has been a critical element in maintaining the engagement of the delivery partners.</p>
Perceived benefits	<ul style="list-style-type: none"> <li>- Again, mixed picture. Much of the evidence is at the level of the individual beneficiary, or small group. The perceived benefits in individual instances are high.</li> <li>- All partnerships have found difficulty in conveying the scope of the potential benefits and impact, in aggregate.</li> </ul>	<p>In some ways, it remains the case that the CSDP has found difficulty in conveying the scale of its interventions, and their potential impact, through individuals, on communities. We are not aware that any of the other comparators have developed neighbourhood floor targets and benchmarks.</p>

Dimension of partnership	Evidence from experience elsewhere	Lessons for the Core Skills Development Partnership
Efficiency and effectiveness	<ul style="list-style-type: none"> <li>- In relation to their scale of resources, there is huge variation in the size of the administration and executive functions.</li> <li>- This (in turn) means that there is huge variety in the type of activities, and the <u>direct role</u> of the partnerships in these.</li> </ul>	<p>All of the comparators appear to be relatively effective in achieving their objectives. We have not been in a position to assess relative efficiency.</p> <p>It is clear, however, that the CSDP policy of running a very small management and administrative team, relying on delivery partner systems for contract management, is unusual.</p> <p>The policy of funding CSDP development “attachments” in partner organisations is also unusual. Most of the comparators (where they have invested specifically in development workers) have tended to add to the project development establishment of their own partnership, rather than <u>vest the development function within the delivery partners.</u></p>

## Timeline of key incidents in the life of the CSDP

<b>Year</b>	<b>National - context</b>	<b>National - basic skills</b>	<b>Local - context</b>	<b>Local – basic skills</b>
<b>1994</b>	LA 'cuts' and targeted grants		Legacy of ICCP; City Challenge; Section 11; Progress of SRB1	Consultation/review of current practices
	'Inner city' focus			Local Authority systems 'taken by surprise' re change
<b>1995</b>			Tim Brighouse as CEO	
			SRB2 – literacy/ numeracy identified as theme	
<b>1996</b>				Focus on literacy development – Year of Reading
<b>1997</b>	Blair government 'Education; education; education'	National Literacy Project (primary)		Yr1 = doing year – visible progress; targets hit
	14-19 report			BSA consultancy re voluntary sector
	Area based initiatives (EAZ, EiC, Sure Start etc)			Focus on numeracy development – Year of Maths
	Review of abis; Neighbourhood Renewal Strategy			
<b>1998</b>		National Numeracy Project (primary)		Faster than national rates of improvements
		National Literacy Strategy (primary)		
<b>1999</b>		National Numeracy Strategy (primary)		Adult basic skills plan picked up as national model
<b>2000</b>		Skills for Life Strategy		

<b>Year</b>	<b>National - context</b>	<b>National - basic skills</b>	<b>Local - context</b>	<b>Local – basic skills</b>
<b>2001</b>		TEC transforms into LSC	Highbury 3 'flourishing neighbourhoods'	Rates of improvement slow
<b>2002</b>	Outcome focused planning and reduction in planning load	KS3 Strategy	Jobcentre Plus starts (Benefits Agency and Jobcentre Service)	LSC Basic Skills Plan
			Connexions starts (Youth Service and Careers Service)	Adult Basic Skills Review – highlighted as good practice; potential for floor targets for adults
<b>2003</b>	Primary Strategy Report			LEA L&N Strategy being produced Neighbourhood Renewal floor targets being modeled Learning Cities' assessment framework devised

## **Output distribution by project**

<b>Outputs</b>	<b>CSDP Project</b>
Jobs created	CS1 2 jobs CS2 36 jobs CS3 3 jobs
Jobs safeguarded	CS3
Training weeks	CS3
Unemployed into jobs	CS3
Young people benefiting	CS2
Pupils benefiting	CS2
Adults gaining qualifications	CS3
Businesses advised	CS4
Voluntary / community groups	CS2
New volunteers	CS2
Parents assisted	CS2
Schools benefiting	CS2