Routes Project Phase 3 Evaluation

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EXECUTIVE SUMMARY

Community Works commissioned the authors to carry out this evaluation in the final year of the 6-year Routes project. The report focuses on Outcomes, Participant Experience, Participant Voice and Casework Management, and presents recommendations for any future delivery under each of these themes.

Methodology/data collection/contributors

- Desk top research included previous evaluations, relevant publications and eighteen participant assessment forms
- Quantitative data sources included the BBO Annex B reporting forms
- Qualitative data sources included eight case studies, nine participant interviews, an Action Learning Session, two team meeting observations, three Advisor interviews; and surveys with their Clinical Supervisor, four senior manager, and nine referrer agency contacts

Casework management recommendations:
- Consider the participant profile, including flexing the eligibility criteria, where helpful
- Implement a referral form/centralised triage function
- Advisors should be situated in community settings, alongside peers, a hybrid model
- Staff training, development, support, should be considered essential and budgeted for
- Staff should have regular line-management supervision, team meetings and reflective or clinical supervision and clearer guidance available around how to best utilise these
- Undertake an Environmental Impact Assessment to identify greener ways of working
- More streamlined paperwork processes that avoid duplication and bureaucracy
- Migrate to electronic, online systems, remove the need for wet signatures on paper
- Advisors to have the freedom to open and close cases, and to accept re-referrals
- Outcomes not just reserved for closing cases but all the way through their journeys
- Consider funding separately two projects - one for those closest to the labour market and one for those furthest from the labour market

Participant Experience recommendations:
- Implement a central triage and monitoring system to match participants to the service delivery model that best meets their needs, and capture their demographic data

Participant Voice recommendations:
- Engage specialist professionals around good practice in participant involvement and influencing, in the planning stages and throughout lifetime of project
- Take a bottom-up approach to service modelling and embedding participant involvement in all aspects of the project (including funding, recruitment, governance)
- Invite participants to determine a governance mechanism they want to be involved in, e.g., a steering group, and provide the support and resources they request
- Include consulting all intended beneficiary communities of interest, partners service users and those Routes did not reach, especially re: participant profile and met needs

- Involve participants in the process of creating policies, procedures, and impact assessments
- Ensure peer support opportunities are available, informed by, and ideally peer led
- Ensure appropriate opportunities are promoted and used to regularly capture and learn from formal and informal participant feedback (ensure the feedback loop gets closed)
- Ensure participant voice directly informs funding organisations' intelligence and decision making around designing future funding models and schemes

Outcome recommendations:
- Dialogue with funders re: the terminology used, including outputs, outcomes results
- Develop a theory of change from outset
- Only singular outcomes are used; only indicators that are directly correlated are used
- Outcomes to be recorded throughout the participants journey, not just on exit
- Explore qualitative methods of evidencing less tangible outcomes, e.g., resilience
- Work placements, voluntary work and internships are all considered outcomes
- An Employment Broker role be considered crucial to secure employment opportunities
- A Diversity, Equity, and Inclusion strategy is created and implemented
- The Participants' Costs Fund should be easier and quicker to access
- Implement a process to capture feedback from those who disengage
- Methods of capturing feedback are made explicit alongside the Complaints Policy

Through this report it is clear that the participants whose voices we heard were very positive about the Advisors. This was also true of all the other professionals that contributed to this report, including their clinical supervisor, their colleagues in their own organisations and in referral agencies, and also and very importantly, their senior managers.

The Advisors managed their own referrals and triage processes, shielded their participants from the burden of paperwork, navigated the chaos caused by multiple lockdowns, juggled resources to ensure everyone got their needs met, all the while remaining outcome-oriented for the benefit of the participants achieving their goals and achieving their targets, whilst also managing the ethical dilemmas associated to the closure of cases. The Advisors have made this project what it is, and that is something to be proud of, and for this they have the respect of the evaluators for delivering such an inspiring and impactful project.

The partnership organisations were extremely grateful for the funding opportunity to provide the Routes service to their beneficiaries and communities. The funding created real opportunities for people to achieve their goals in a very person-centred way, removing obstacles in a way no other available revenue stream can, and changing the lives of many. The partners have a sense of pride that participants have been able to achieve what they have and in their staff for delivering such an amazing and inspirational project.

The project is now closed and as such there will be a substantial hole left in the employment support landscape locally, not just for local people who need help finding work and training, but also for the delivery organisations and other local organisations that this project touched. The legacy of this project lives on in the communities in which it served and in the people who have been involved with it.

With thanks and gratitude to the funders and to all who those that helped make it happen.

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1. INTRODUCTION

Routes was a partnership project that provides personalised support and a range of activities and opportunities to help unemployed or economically inactive people to engage in learning opportunities with the view to moving them closer to the labour market and find jobs that last.

Routes was funded for six years by the Building Better Opportunities (BBO) programme. The National Lottery Community Fund matched funds from the European Social Fund (ESF) to provide joint investment in local projects tackling the root causes of poverty, promoting social inclusion, and driving local jobs and growth, particularly for the hardest to reach groups.

BBO supported a variety of projects, ranging from those improving employability for the most disadvantaged, helping those with multiple and complex needs, to improving financial literacy. BBO was designed to engage the expertise and knowledge of a wide range of stakeholders through encouraging partnerships, thus creating positive impacts for harder to reach groups.

The Routes project was funded in three parts: The first contract ran from September 2016 to February 2019, the second grant ran from March 2019 to March 2021, and the final grant runs until December 2022. At the point of submission of this report (October 2022), all participants cases had been closed and staff were finalising their contract requirements.

The Routes partnership was led by Community Works who operate across both geographic delivery areas, Brighton & Hove and West Sussex. The three delivery organisations were:

- Workers' Educational Association (WEA) - West Sussex
- Hangleton and Knoll Project (HKP) - Brighton and Hove
- Brighton Housing Trust - Sussex (BHT) - Brighton and Hove

HKP delivered from St. Richards Community Centre in Hangleton and Knoll, and BHT delivered from the Whitehawk Inn, in East Brighton. Both areas are known to be the most deprived parts of the city and in the top 20% most deprived areas in the country (Brighton & Hove City Council Plan 2020-2023)[1].

Each delivery organisation has historically specialised in something different; HKP specialised in Information, Advice and Guidance in a community services model, BHT specialised in work placements and WEA specialised in training packages. These specific models shaped the service offer right from the start. However, due to various factors the offer evolved over time.

For the final phase of the project the HKP Routes Advisor was Claire Hines, for WEA the Routes Advisor was Aradhana Kothari, and at BHT the Routes Advisor was Brodie Hall.

At referral, the Advisors screen participants for eligibility, motivation, and readiness to do the work required. All participants engaged in an assessment process, identified their goals, and created action plans. Their progress towards their goals was monitored regularly.

Some participants were close to the labour market and only required some short term "hand holding", gentle encouragement and help with specific tasks in order to find employment, for them the Routes journey was short. Others had multiple barriers to employment, complex needs, many had protected characteristics, and were perhaps considered disenfranchised.

The Advisors adopted a flexible method of support, a "toolbox" approach, whereby they drew on a wide range of skills, approaches, concepts, models, theories, and frameworks to respond to each participant's needs. They were extensively experienced, professionally intuitive and this enabled them to be genuinely person-centred.

"It has been very successful in finding people who were unlikely to take the first steps to training and supporting them into a journey towards employment. We have been able to work together to create pathways and have really developed casework IAG approach that results in jobs that last" (Senior manager).

Routes was operating during some of the most challenging circumstances that this country has ever faced:

"The project started in a time of high employment and was designed to support those furthest form the labour market. It saw, Brexit, COVID, and now a recession. All these impacted on our ability to deliver and who we were able to deliver to." (Senior manager)

Despite the bleak economic landscape, at the time of submitting this report, unemployment in the UK was still low (Norris-Green and Wheatley for IES (2022) [2] , and the labour market was in a fairly stable situation (Labour Force Survey - Apr-Jun, 2022) [3] With a small decrease in employment rates (0.1%) now 75.5%, still below pandemic levels, a small increase in unemployment rates (0.1) to 3.8%, a small increase in self-employed workers this quarter but still low since the pandemic and a stable economic inactivity rate (21.4%), driven in part by people on long term sick.

The need for this project was clear when it started, it has been clear throughout the six years of delivery and it is still needed now, demonstrated continuously by the number of participants finding their way to the project and by the three evaluations undertaken during the life-course.

Two evaluations preceded this one, reflecting the three funding phases of the project.

The phase one evaluation was undertaken by Chris Baker and Maureen Haywood of Work & Learning Opportunities CIC between March 2018 and February 2019. It reviewed performance data, conducted interviews with staff and participants, examined case studies and looked at the impact of the partners' combined efforts and the distinctive nature of their approaches.

The phase two evaluation was undertaken by Oonagh O'Brien It initially sought to document the legacy of the project as it drew to an end, but with the announcement of the BBO continuation funding, energies were channelled towards making recommendations for the new project delivery plan.

Both suggested improvements and developments to the project, some of which were implemented. Those that were still relevant were bought to the fore within this final evaluation.

There was common recognition that by tailoring an intensive support package, through dedicated person-centred support, and with access to a personalised budget, then people who face significant barriers to being able to work can be supported into jobs that last.

"The person-centred approach has been a success and we will continue to take this approach with any similar projects in future." (Senior manager)

This evaluation fell at the end of six years of funding, and as the project was drawing to a close. The evaluation brief was to draw out data around several key areas:

- **Outcomes -** The aim was to explore project success overall and during the period covered by the evaluation.

- **Participant experience -** The aim was to capture a sense of the participant experience of the project, the Advisors, what services were received, how helpful they were, and their outcomes.

- **Participant Voice -** The aim was to ascertain the extent to which participants were involved beyond the design of their own journey, that influenced project design, delivery, or evaluation.

- **Casework Management –** The aim was to understand the issues that the Advisors were dealing with that could help evaluate the project in terms of how cases were managed, not only at their level but also at a more strategic and senior level.

- **Recommendations –** The aim was to follow up relevant recommendations from the previous evaluations, make recommendations throughout the process for immediate implementation, and importantly, present recommendations for future project delivery.

At the time of submitting this report, the partners had not identified continuation funding for Routes, although there was a shared interest in retaining the delivery models. The learning from involvement in Routes and potential for legacy projects was recognised by Community Works:

> *"The partners will have gained much experience through the evolvement of the programme which will inform the design of future services within their communities and enable them to continue to build on the legacy in a way that meets local demand."*

The evaluators and authors of this report are Niki Rowe and Mark Cull, both are freelance consultants, each with over twenty years' experience in the field; they have both worked in client facing, project management, and senior management roles within local charities and organisations.

The authors wish to thank the 51 people contributed to this evaluation, including the 3 Advisors, their clinical supervisor, the 5 senior managers, the 9 referral agency contacts, and most notably the 33 participants who gave their time and energy voluntarily and with integrity and kindness.

2. METHODOLOGY & DATA COLLECTION

Desktop research – The previous evaluation reports that had been written for the project were read and the recommendations they made were noted. Those relevant to this evaluation or potential future delivery, were followed up. Several BBO documents referenced in these reports were also read. The BBO reporting forms were examined over the 6 years of the project (Annex B's). Sixteen Participant Journals: Initial and Follow-up Assessment Forms (Part 1C's) were analysed, along with eight case studies. The Advisors' clinical supervisor also completed a questionnaire.

Initial Information Gathering Survey – To follow up some of the issues and themes raised in the desk top research, an Initial Information Gathering Survey was designed for the Advisors, which had 29 questions covering the four focus areas and some relevant recommendations from the two previous evaluations.

Team meeting observations – The evaluators observed two team meetings where all three Advisors were present, on one occasion, a senior manager was also present. This was a data collection method for the focus areas: case work management, participant voice and outcomes. Each meeting lasted an hour. Recommendations were presented back to the Advisors via email.

Action Learning Session – The evaluators delivered a 2 ½ hour action learning session with the Advisors to discuss their understanding of the term 'Participant Voice', what they had already tried and what else they could do in the last five months of delivery. This session was followed up with a slot in a team meeting to provide some recommendations.

Advisor interviews – We designed an interview schedule for the Advisors with 17 questions to draw out information on their outcomes, their casework management practices and recommendations for future delivery. Participant Experience and Participant Voice were not included as these were being explored elsewhere. The average interview was 1 ¼ hours.

Participant interviews – Advisors identified 17 participants they felt would provide a good mix of demographics. This was narrowed down to 12. Advisors made initial contact, some of whom did not respond. A pre-interview information and consent form was sent to all 9 participants who were subsequently interviewed in person, online or by phone, using a 10-question survey that explored their experience of engaging with Routes. This was the data collection method for 'Participant Experience'. The average length was 1 hour and 10 minutes. 7 were Brighton-based, 2 West Sussex. The average length of support was 14 months. 4 were closed and 5 still open. 3 referrals came from Jobcentre Plus, 2 were internal from delivery partners, 1 via a GP, 1 self-referral, 1 from a life coach, and 1 from Change Grow Live.

Disengaged participants – 7 ex-participants who had disengaged from the project were contacted by phone to ask them for feedback about their reasons for disengaging. None of them responded except one who was unable to provide feedback.

Senior Managers / Leaders Survey – A survey was constructed with 10 questions referring to the initial project vision, the previous evaluations, project success, participant profile, outcomes, participant involvement, casework management, organisational gains, challenges, and learning, and their experiences of and messages for BBO. We had responses from senior managers and leaders from all three delivery organisations and Community Works. Through the report the senior managers and leaders are collectively referred to as senior managers.

Referral agencies Surveys – Each Advisor identified key referral contacts in local agencies who could provide feedback. 12 professionals were emailed a 10-question survey. 8 responses were received.

3. DATA ANALYSIS – CASEWORK MANAGEMENT

3.1 Referrals and triage

The phase two evaluation suggested that the partnership develop a common approach to triaging clients at the pre-assessment stage. A triage process was subsequently established and by all accounts this was helpful, however, when the person doing this work left their role, this ended, and the Advisors returned to processing their own referrals.

> *"It was helpful having more support around managing referrals and triaging, monitoring where referrals were coming from and outcomes" (Advisor)*

That evaluation also highlighted that the project would benefit from tightening up the referral criteria and be more specific about the profile of participants they work with. This would improve the control they had over incoming referrals and prevent time wasting. One senior manager highlighted a similar point:

> *"The process worked well, though we did consider the referral criteria may not be clear, e.g. referrals came through for people already employed." (Senior manager)*

> *"Sometimes people do turn up for an assessment, but they don't really know why they're there, they don't understand what the project is… but that's probably because of an inappropriate referral." (Advisor)*

The Outcomes section will attest to the fact that there were times when the team did not meet their targets around working with unemployed people, men, over 50's, people with disabilities and people from ethnic diverse communities.

This presented an ethical dilemma for the team; do they respond to and work with the referrals they receive, or do they wait for referrals that will help them achieve their deficit targets? The project did not have a referral and triage process that had a solution to this dilemma. This was in part compounded by not having a referral form.

Having both a referral form and a centralised triage function would have given the project tighter control over who was worked with. The evaluators would recommend both for any future delivery.

Routes was designed from the outset to prevent a 'revolving door' model, so once closed, participants could not be re-opened or re-referred. The Advisors and some senior managers felt that this was counter- productive as there were times where this was necessary, e.g., when it became apparent early on that participants were not ready to work with Routes, Advisors wanted to close them, get them the help they needed and re-open them when they were ready:

> *"Striking the balance between support and having participants on project for overly long periods of time whilst they address wider personal challenges which may limit their ability to interact on a regular basis... Working within a suggested timeframe for participants stay may have given a clarity for when participants should have been exited which in many cases would have been to their benefit rather than being on Routes but not engaging with it." (Senior manager)*

The requirement for participants to be unemployed or economically inactive excluded many who may have benefited from working with the project:

"I've had a lot of referrals for people who are … registered self-employed or on zero hours contracts, but we can't work with them, even though they're not in the employment they want to be. It would be nice to work with those people, because it's about helping them to improve their possibilities… Sometimes people have de-registered as self-employed so they can come on the project." (Advisor)

The evaluators recommend that for future delivery, that further consideration be given to the participant profile; specifically the need for participants to be unemployed or economically inactive in the strictest definition of the sense. This could include flexing the eligibility criteria to include, for example, people who are self-employed or on zero hours contracts.

3.2 Support with casework

The phase two evaluation recommended that the project adopt a casework management approach and offer Advisors more support to manage their cases and caseloads. They defined casework management as a:

"collaborative process which: assesses, plans, implements, co-ordinates, monitors and evaluates the options and services required to meet an individual's health, social care, educational and employment needs, using communication and available recourses to promote quality cost effective outcomes" (Case Management Society UK) [4]

The project's casework management processes were described by one senior manager as having *"evolved during the project life cycle with a particular focus on capacity against targets."*

The Advisors had four formal opportunities to receive support around casework management, these are outlined below. The Advisors' interviews documented that they believed that all four were useful, however, there was a lack of clarity about what to take where, and consequently, they were often opportunistic in that they took their issue to whichever one came up first. This could have been alleviated by having clearer definitions of each and guidance about what should be taken where, and this is recommended by the evaluators for any future delivery.

Line Management Supervision

It was broadly accepted by Advisors and senior managers that line management supervision was important for casework management, from an organisational perspective, but also to ensure oversight of caseloads, especially in relation to capacity and closing cases.

Despite this, Advisors had mixed experiences of receiving it; for some, having a manager in the same building enabled impromptu but timely conversations that helped Advisors feel less isolated… especially where the supervisor was experienced in delivering similar kinds of work:

"Given the complexity of some participants' lives, it was beneficial for line managers to have social work and IAG knowledge to give support and ideas to the Advisors around how to manage more complex cases." (Senior manager)

The evaluators recommend for future delivery that all staff working with participants have regular line management supervision to manage caseloads from a project and an organisational perspective.

Team meetings

At the start of this evaluation, the Advisors moved from having separate team meetings and casework management meetings, to an integrated model. Observations of two team meetings

identified that case work management was not discussed in an organised way. This was supported by the Advisors interviews:

> *"I feel confused by the purpose of the meetings, they feel less structured than in the past" (Advisor)*

Part way through this evaluation, the evaluators suggested that team meetings could benefit from being better planned, organised, and structured and proposed a new agenda template. However, in the second observation, casework management was still not discussed.

> *"I feel we all need to get on with the day; having another space to think about cases at the end of that meeting hasn't worked yet". (Advisor)*

> *"I don't tend to talk much about clients in that forum, it feels more about housekeeping, service updates" (Advisor)*

Evaluators recommend for future delivery that team meetings are used for case<u>load</u> management to ensure there is broad oversight of caseload, referrals, major issues, blockages etc, to ensure the project is on track with targets, rather than case<u>work</u> management, which is more about discussing complex cases, better suited perhaps to one of the other settings.

Individual Clinical Supervision

The facilitator describes this as:

> "*A chance to discuss clients and their personal approach and can positively impact wellbeing at work.*"

Advisors have this every 8-weeks. Advisors valued this space because it enabled them to unpick the issues they were dealing with on a deep level, and this included how their private lives or personalities impacted their work. Because this was a one-to-one, it meant the space was private and confidential.

> *"We considered that some participants had high complexities of need and introduced group and clinical supervision and reflective practice for Advisors that explored psychologically and trauma informed ways of working." (Senior manager)*

Advisors and senior managers stated that clinical supervision should have been built into the project at the start. Once introduced, not only were the Advisors better supported, but their ability to work with participants was enhanced.

Reflective Practice Supervision (RPS)

The facilitator describes this as:

> *"A place to come together, share ideas and good clinical practice."*

Advisors have this 3-monthly. Within these groups Advisors discuss things like working with participants who are "stuck", when it is appropriate to close participants cases, working with multiple and complex needs and clarifying of the Advisors' role.

RPS was valued by all the Advisors however they engaged with the process differently; those with more to work through benefited more and those that considered their problems less challenging, took more of a back seat. It was felt that this space was positive, however it was used, because it helped alleviate the isolation experienced by Advisors.

Within RPS, the facilitator was additionally contracted to deliver three 1.5-hour training sessions. It is worth noting that staff training and development was not budgeted for in the initial project budget.

Having the support of a clinical supervisor was felt to be highly beneficial to casework management and all three Advisors and the facilitator recommended that both were budgeted for from the outset of any future delivery.

> *"We were able to work closely to think about their clients: understanding dynamics of the working relationship and the impact on the worker and then working with different ideas and interventions. Therefore helping break cycles of stuckness or reaching the decision when someone would be closed…. there should be a clear thread between different projects from the beginning and how they can support each other, as small teams can be isolating". (Clinical supervisor)*

The evaluators believe that staff training, development and support is considered essential to the on-going development of all staff, and they recommend it is budgeted for from the outset.

One Advisor at times felt isolated and would have benefitted from having a colleague working within the project in the same building or easily accessible. The evaluators recommend that for future delivery, the working environment of Advisors is carefully considered alongside the relative associated merits for teamwork, staff support and casework management.

3.3 Impact of the COVID-19 pandemic

The first COVID-19 lockdown saw the closure of centres, and this left many participants unable to continue with their action plans in the way that they had intended. However, after an initial period of disengagement, communication quickly resumed through *"telephone, text, letter, email, WhatsApp and Zoom"* (Annex B 2020 Q3). During this time, the focus of the work shifted towards participants' well-being and meeting their basic needs:

> *"It was much more around checking in with people and supporting their wellbeing and seeing what they needed, because everything ground to a halt. No-one was really thinking about employment, some people were thinking about how they could develop themselves, and in learning, but most of it was managing wellbeing." (Advisor)*

Advisors reported that lockdown negatively impacted participants' mental health and that these issues, e.g., anxieties, isolation, loneliness and buying provisions, took priority over and above getting a job, and that this was probably responsible for much of the disengagements around that time. (Annex B 2020 Q3).

Advisors found creative solutions to help participants progress their action plans, including sending 'care packages' e.g. carpentry tools for a course; gardening equipment to prepare for volunteering, and some participants were sent learning materials by post. (Annex B 2020 Q2).

Lockdown brought to the fore the issues around digital inclusion; many participants lacked digital skills and IT equipment:

> *"The reliance on digital meant that there was a need for some level of digital literacy in order to enter the project, as well as equipment and connectivity…. Engaging with those furthest from the labour market was very hard under Covid due to digital literacy and digital accessibility issues" (Senior manager)*

The shift to more digital ways of working brought advantages for some because participants who were not local, or with accessibility or mobility issues, could engage where they had not been able to before. This freed time up to support more participants:

> *"Zoom calls became increasingly popular, which minimised the need for travel, increasing the number of participants who could be supported." (Senior manager)*

> *"Historically partners have worked independently of each other with recruitment focused on their individual localities and communities. Now with increased remote and digital working it has become easier for partners to support participants across the partnership referral area… allowing the project to be more responsive and avoiding waiting lists." (Annex B 2021 Q1)*

The main challenge with the transfer to remote working was that it prevented participants who were digitally excluded from being able to engage meaningfully toward achieving their plans and consequently, Advisors had to offer more support to these participants, who often also struggled with other inequalities.

Steps were taken to support those without online access to try to narrow the inequalities gap: e.g., Community Works secured funding through COVID-19 Emergency Funding to purchase laptops and internet dongles, to loan to eight participants for their continued online learning.

Advisors searched for free equipment on local websites, approached local communities for donations for laptops, referred participants to local organisations to help them obtain free IT equipment, requested discounted laptops from three large companies and applied to Turn2Us grants platform for IT hardware. (Annex B 2020 Q4).

Advisors responded further by increasing their understanding of the barriers to digital inclusion, updating their skills and knowledge in digital accessibility and online learning, which helped enhance interventions to address digital skills remotely. (Annex B 2020 Q2).

There was a need for participants to access training courses online and therefore online courses became more widely offered to all participants. This was particularly helpful for participants who were digitally able and equipped but perhaps not local. However, for some participants with certain needs, they required face to face opportunities:

> *"One of the reasons we did the ESOL IT course was because they were struggling with doing their ESOL courses online." (Advisor)*

As lockdown restrictions eased, there were increased opportunities in relation to training and employment, e.g., volunteering, and widening job search to hospitality sector. However, positive COVID-19 testing continued to negatively impact their delivery.

Advisors at BHT and HKP introduced more of a hybrid model of working whereby people were met in person when it was safe and possible to do so (e.g., they were local, wore masks, met outdoors). Offering a hybrid model enabled participant choice in how they accessed support, those who wanted to, engaged o-line and those who could, engaged in person.

The WEA Advisor continued to work remotely, due in part to the fact that WEA's work is online and West Sussex is more geographically dispersed and without a central community hub. It was widely understood that remote working with clients does not lend itself to this type of work and the WEA Advisor and the evaluators would recommend that for future delivery, Advisors should be based in community organisations and based in community venues.

3.4 Paperwork and processes

Commentary from Advisors and senior managers indicated that whilst they understood the importance of the paperwork required within BBO administration processes, this burden reduced their capacity to delivery participant-facing work.

Participant paperwork

> *"I get why a lot of it is there, we have to evidence what we are doing to the funders. I think everything has a place, but the assessment paperwork could be briefer." (Advisor)*

It was believed that up to half of Advisor's time was spent completing paperwork and that this weighed heavily on them, described as *"tedious, disproportionate and demotivating".*

> *"We have to see evidence of someone's right to live and work in the UK and whether they're unemployed or economically inactive. There's a lot of paperwork, it can be quite complicated… certain forms to complete to qualify, a lot around eligibility." (Advisor)*

HKP devised and delivered a range of courses in response to client need, and often each course could train large groups. The full starters paperwork was needed for everyone, and this made the delivery of said groups challenging. The Advisors recommended a *"short form"* be created for *"quick starts on courses"* and this is echoed by the evaluators.

The Advisors shielded participants from the burden of the paperwork as far as possible, however, there were still lots of documents they had to sign. One participant said:

> *"There was paperwork - every so often a whole bunch of paperwork… all our discussions, i.e., you're going to get this done by this time, this is what we're looking at… What we discussed and agreed, and then signature."*

When designing paperwork for future delivery, the evaluators recommend re-considering what is essential, making forms succinct and avoiding duplication. The Advisors referred to it being *"more streamlined, flexible, and person-centred".*

> *"Administration is challenging – there is a lot of paperwork that needed to be generated, with some information required being duplicated, a move to on-line recording would be more efficient for future projects." (Senior manager)*

Project administration paperwork

Advisors and senior managers highlighted a similar situation with the administrative paperwork (e.g. expenses claims, participant's costs fund, getting quotes for items, as well as the return documents), where the process was lengthy and bureaucratic, causing unnecessary delays.

> *"It is all about crossing the T's and dotting the I's all over the place" (Advisor)*

Advisors, senior managers, and some participants felt strongly that the need for wet signatures on all paperwork was unnecessary and that digital signatures should have been allowed, especially where outcomes may not have been recorded simply because a wet signature was not returned on closing paperwork.

> *"The need to print out documents before scanning them back in to be stored took up enormous resource. And the environmental impact of printing, posting, and scanning wet signatures should not be underestimated. Likewise, the need to record timesheets*

also soaked up inordinate amounts of staff time, and it was an enormous relief when this was relaxed. The paper and ink needed in this respect was an additional cost that would have been better directed towards participants." (Senior manager)

This was additionally challenging during lockdowns; and there was a call for more electronic rather than paper-based processes, and less duplication in future:

"The processes for completing case paperwork were clear but there is a lot of paper-based form filling which also leads to duplication of information. For example, the EARN and Annex N require a lot of the same information. It may be more efficient in future projects to have a computerised record system." (Senior manager)

One of the two BBO cross-cutting themes is 'Environmental Sustainable Development' [5] and this is pertinent to this issue:

"This cross-cutting theme is intended to ensure inclusive, fairer and greener ways of working – for the lead organisation and the partner organisations… This ought to be a primary concern in BBO delivery given the climate emergency, and related responses such as the UK's stated aims for Net Zero… [This] holds real significance for current work and legacy: all positive and progressive actions … help to address and to mitigate the huge, ongoing challenges … [of] climate change."

In their 'Summary for Partnerships', BBO advise partners to *"Embed the cross-cutting themes within day-to-day delivery."* The practice of printing and signing paperwork is at odds with this.

Alongside the views of senior managers the evaluators recommend that for any future delivery more processes are migrated to electronic, on-line systems, reserving paper copies for those considered digitally excluded, and that wet signatures are not considered necessary.

Additionally, the evaluators recommend the for any future delivery, in the project design phase an Environmental Impact Assessment is carried out to identify 'greener' ways of working.

3.5 Closing cases

Participants sat on a broad spectrum of need, and this was reflected in the length of time that cases were open. When to close cases has been quite a contentious issue for Advisors.

On one end of the spectrum, some participants were far from the labour market, they were considered to have multiple and complex needs or additional disadvantages, they may take longer to achieve and change things; their lives may be more chaotic, and they can miss appointments. They often required holistic, supportive approaches and more long term 'holding'. They were therefore worked with longer term.

Conversely, some participants are much closer to finding work and they require some short term "hand holding*", gentle encouragement and help with specific tasks finding employment. The Routes journey for these participants is appropriately, much shorter.

The BBO outcomes are clear in that the results (into employment, education or training, or job search) are only counted at the point of exit. However, the latter two especially can be short term and if exited, once the course finished, they could not be opened again or re-referred. Invariably, Advisors kept participants cases open and did not record these "results" because their participants would need them once the course had finished. This was also the case when participants found employment, in case the participant did not settle well and left their position.

The phase two evaluation highlighted that there were no timescales in place, and it was recommended that some were established. Some senior managers also acknowledged this:

> *"Some remained long term on programme, and it may be the case that for these this was the right thing to do but casework management should link back to the original service offer, which with hindsight should have set time limited packages of support."*

Advisors were invariably against this idea, as it did not serve their participants well, and they used the lack of timescales to their participants' advantage. In doing, they had to forfeit the achievement of recordable "results" and manage any tensions with their seniors as a result.

3.6 Ending the project

Toward the end of the phase three evaluation it was evident the partnership would not obtain continuation funding in time to sustain Routes. Consequently, the team were only accepting referrals where they could deliver only short term, focussed interventions that moved people closer to or into employment. As such the work became less about addressing the wider holistic needs of a participant. Also important was ensuring support would be in place once Routes ended:

> *"… thinking about where that person is going to go, so referring on if they need to, to another appropriate service, or getting them more involved in things at HKP if that's appropriate. So then it doesn't just stop and then they're on their own." (Advisor)*

The partnership had been in this position before, when the second round of grant funding was coming to an end a similar approach had been adopted:

> *"We plan to manage smaller caseloads for shorter periods of time (3-4 months intensive support) and have developed a framework within which advisers will seek to work, setting expectations with participants at the outset and regularly reviewing individual progress against action plans to identify potential slippage at an early stage and to address these behaviours in a constructive manner." (Annex B 2020 Q2)*

> *"We are now entering our two final two quarters of delivery and planning and so carefully planning delivery times with participants as historically we have taken a longer-term approach." (Annex B 2020 Q3)*

At the end of the casework management section it is worth us noting that in order to do their job well, the Advisors had to be on top on managing their own referrals and triage processes, shielding the participants from the burden of paperwork and the need for wet signatures, navigating the chaos caused by lockdown after lockdown, juggling resources to ensure everyone got their needs met, all the while remaining outcome-oriented especially when managing the closure of cases. The Advisors clinical supervisor described them as *"very competent"* with *"great strategies to manage their clients and themselves."* This is a view that is echoed by the evaluators.

4. DATA ANALYSIS - PARTICIPANT EXPERIENCE

The data for this focus area is qualitative and comes from participant interviews, participant case studies, participant exit feedback, senior manager surveys, Annex B returns and referral agencies. The evaluators were unable to hear from participants that disengaged from Routes., All quotes in this section have come directly from participants unless stated otherwise, for example where quotes are derived from the Annex B reports.

All nine participants that were interviewed, and those represented in case studies, had resoundingly positive experiences of engaging with Routes.

This section begins by outlining the complexity of the needs of the nine interviewees as a means of documenting the range of participants that Routes worked with. The nine participants are not a representative sample, and the data collected from these interviews is not representative and therefore no generalisation can be made from their experiences. The intention in this section is to draw out the participants experiences in a meaningful way without outlining their whole journeys which would compromise their anonymity.

This section describes participants initial experiences of engaging with the project, building relationships with their Advisor, goal setting and action planning, models of working, community-based settings, and the element of choice. It also breaks down participants' experiences of their Advisor in terms of the qualities that they embody, the approaches that they adopt, the experience and networks that they have, all with a view to moving each participant forward. This section also considers the impact of COVID, the equalities issues impacting their experiences, and their experiences of achieving results and outcomes,

4.1 Complexity of needs

All but one of the nine participants that were interviewed had multiple barriers to finding work.

> *"I was made redundant, no huge work barriers, but not as actively looking for work as [I] could have been."*

There were four different types of barriers experienced by participants, these are outlined below.

Barriers that can't be removed:

> *"I ended up caring for Dad full time… what could I do? A job would have to wait."*

Barriers that can't be removed but can be improved:

> *"Feels like mental health is still a work in progress but more manageable."*

Barriers that are removed without the project's intervention:

> *"When my children started school, I was able to work part time and that felt good."*

Barriers that can be removed by the project:

> *"Treading water and I don't know where to go now… no idea where in the world I can find my place."*

> *"There was an 8-year gap on [my] CV … I convinced myself I was unemployable."*

This sense of being unemployable was also echoed by another participant upon starting the project:

> "Initially it seemed impossible to advertise oneself to potential employers – it took some work to shift that entire mind-set into more positive one."

Four participants had multiple and complex needs: one had autism, ADHD and anxiety; another was dyslexic with complex trauma; another had autism and dyslexia and was homeless; and another was recovering from addiction, had anxiety and was insecurely housed.

Only one participant did not have mental health issues but had other barriers, such as not having settled status in the country, learning English, and having professional qualifications that they were trying to convert. Almost all were claiming benefits (e.g. Disability Living Allowance / Personal Independence Payment and Universal Credit) and this meant further challenges around needing to secure only part time work.

4.2 Initial engagement / relationship building

From the early moments, the Advisors took time to help the participant feel comfortable and at ease. This was important because it provided the foundations for building trusting relationships. The Advisors created space to enable the relationship to develop and these became what one participant referred to as the "springboard" for positive change.

> "Immediately felt at ease in her company."

> "Someone taking me seriously. I've been labelled as a lot of negative things … and having someone treat me as a person and speak with me about goals, ideologies and career aspirations has been very positive – my self-worth has improved a lot from that. She has reminded me that I do have stuff to give back."

One participant spoke about the significance of attending their first meeting with the Advisor, which had felt a huge hurdle to overcome:

> "Going to Routes was the catalyst for the positive changes that I needed to make within my mindset, I felt so pleased with myself that I had even gone to the initial meeting with her."

For another participant engaging with Routes increased her motivation to address other, long unattended, areas of her life, for example making a dentist appointment, *"I've started to move forward rather than stagnating".*

4.3 Goal setting / Action planning

An important part of the professional relationship in the early days was the discussion around goal setting and the corresponding action plan.

> "At the time I felt like a rabbit in the headlights; I knew that I wanted to go for these goals, but I was a bit confused and unsure."

> "[My Advisor] helped me see and actually do, all the little things that could help me on my journey towards the bigger goal".

"… start working on the areas that needed addressing, set clearer goals and slowly climb out of the illness and unemployment."

The process of defining goals and developing action plans was collaborative, ensuring increased ownership and success.

"This whole idea of engaging and pinpointing my difficulties was helpful. A lot of things have opened up and I'm doing things now that I probably wouldn't have done."

Often together they identified different paths than the ones participants' were first considering. This was due to the Advisors spending time exploring each participant's interests and raising their aspirations to pursuing work opportunities in those areas, where this may not have been something they'd previously considered.

"I've been looking at the care management and … counselling ... she said to me, don't think about what you should do or can do, I'm trying to get out of you what you want to do and enjoy doing."

Without the right support to work towards achieving goals, it can have a negative impact on a participant's sense of self:

"Goal setting in and of itself can be problematic, you want to achieve it, but it feels out of reach or attainable"

And so whilst the goal setting is vital, support to achieve the actions in the plan was equally valued: "*if I had to do all of this on my own, I would still be on the first steps.*"

"… start working on the areas that needed addressing, set clearer goals and slowly climb out of the illness and unemployment."

Several participants noted that their goals were changeable and that for some this was a positive thing:

"I felt like we were recalibrating all the time… they were an anchor, that I could come back to, and they would help me reflect on my progress",

And for others it was difficult:

"I just don't know what I want to do and that's where we're both struggling a bit… I don't feel like I'm moving forward at the moment… don't feel I'm making any progress, which is what's getting me down a lot."

4.4 Intervention models

Utilising their extensive skill sets and experience, the Advisors took a "toolbox" approach to providing support, delivering interventions appropriate to each participant and their individual, and emerging, needs. Advisors shared intervention models between themselves to maximise expertise and enhance participant experience. Intervention tools included mind mapping and wellness action plans.

Advisors used various behaviour change intervention models as and when required. For example, using 'Motivational Interviewing' to challenge participants when they were unmotivated, lacked commitment or resistant to doing tasks in their action plans, not only with job searching, but diet, exercise, social interaction etc.

"Rolling with resistance and eliciting motivation interviewing techniques to identify their motivation to change was key." (Advisor)

The Hangleton & Knoll Project (HKP) expanded their community-based services in response to evident needs of some participants:

"*The development of a new model of engagement and delivery with participants at HKP has been very successful. The offer includes an ESOL IT course, a Job Club supported by the Advisor, an interpreter, and an IT tutor skilled in delivery at a community level with those with very low-level skills. Whilst the process is intensive it has resulted in good outcomes." (Annex B 2021 Q3)*

Participants spoke of the value of having a job club associated to a Routes Advisor which strengthened their engagement with the project.

4.5 Community-based settings

Two Advisors worked from their organisations' local community-based buildings. This had multiple benefits for participants. Many participants first met their Routes Advisor via another project operating within the same building, this eased and warmed up referrals. Participants would sometimes access multiple projects under one roof, servicing their holistic needs. Using HKP as an example, a participant could be referred to the Routes Advisor from the multi-cultural women's group, and then be referred to the IT drop-in.

Participants valued being seen in an inviting or already familiar community venue, *"the fact that they're in a community church is a pleasant and inviting environment".* One participant spoke about the distance he had to travel to get to the building, *"an actual physical journey to get there in and of itself",* but he also recognised this as part of his action plan, to get out of his home more often, and to exercise.

One referral agency felt the unique selling point of the Routes provision was *"working as part of the community in a familiar environment to service users."*

4.6 Choice

Participants valued the choice-based approach taken by the Advisors, *"always full of options, have you thought of this, do you want to give this a go?"*

One shortcoming of the Routes provision was the restriction in choice of delivery model which was generally determined by where a participant lived. This was particularly the case for participants living in West Sussex, where only one delivery partner organisation was operating. Therefore although each delivery partner offered something different, a participant would invariable be offered the Routes service delivery model local to them, regardless of whether a different service offer might have been more appropriate to their circumstances and needs. The recommendation of a central referral triage function could help alleviate this issue in any future project.

Participants identified a range of strengths of the Advisors, these have been assigned into three groups: qualities, approaches, and experience. These attributes were essential to helping participants achieve positive outcomes. One senior manager reported:

"*[name of organisation] is not set up to deal with those with extremely complex needs... The skills of our project workers carried this element of the project for us."*

4.7 Advisors' qualities

Participants spoke about a range of qualities they valued in their Advisor, many of these qualities were mentioned by several participants.

Participants described the Advisors' as friendly, nice, kind, patient, calm, grounded, understanding, empathetic, non-judgmental, realistic, interested, dedicated, encouraging, motivating, positive, inspirational, supportive, helpful, caring, thoughtful and compassionate.

Advisors quickly put them at ease, were down to earth and easy to talk to. They referred to them as a guide and companion along their journey; providing emotional support when needed. They mentioned how professional the Advisors were and experienced them as organised, efficient, methodical, resourceful, focused, and clear:

> "[Advisor] was absolutely **amazing**, **understood** where I was at."

> "… talking to [Advisor] my worry has become less, and I am less anxious to do things and I know what to expect. [Advisor] has been **patient**, not forcing me to do what I don't want to do."

> "… so **positive**, **non-judgemental**, **down to earth**, **easy to talk to**."

> "Not only was she able to advise on employment, but she was **genuinely interested** in me as a person."

> "She is so lovely and **friendly**; immediately **felt at ease** in her company; she is so **positive**."

> "Engaging with Routes has made a huge difference to my life. I have found it incredibly helpful having to time to explore my options and interests alongside an advisor who has been so **encouraging** and **supportive**."

> "I felt I had a buddy who would **support** me and point me in the direction of opportunities I hadn't even considered. The feeling of **companionship** it gave me was invaluable."

> "It helped me regain balance and motivation at a time when I felt very low and isolated. The Advisor's input was always appropriate, **professional**, and **empathetic** and this made a huge different to the success of my job search."

> "When he first met a Routes advisor, he had a feeling of hope. It felt like he had met someone who was willing to take him by the hand and **guide** him to where he needed to go… "They take you by the hand and gently **guide** you through the darkness."" (Case study)

> "What was nice was she sent me a text wishing me luck with my interview."

> "A **calm**, **resourceful** and **compassionate** source of knowledge, strength and **inspiration** to me, and the **empathy** and **guidance** I received… during that challenging transition into employment and overall return to what I would consider a healthier, more normal life."

One participant spoke of their sense of shame and embarrassment due to being out of work for a long period. Their Routes Advisor helped them view this differently and overcome their feelings of shame:

"I felt embarrassed to admit that I am out of work and on benefits, I felt shame… I felt open with her and didn't need to feel embarrassed; she makes you feel at ease. One of my big concerns was I need to update my CV and to know how to explain why I had been out of work for so long, she really helped me with that, worked on my CV, jazzed it up, explained why I have been out of work for so long."

Participants who were already closer to the labour market when they signed up to Routes reflected that encouragement and motivating words were all they needed form their Advisor, which they received and valued.

Referral agencies reported that their clients experienced the Advisors as friendly, reliable, approachable, non-judgemental, consistent, and helpful.

4.8 Advisors' approaches

Participants benefited from a range of approaches adopted by Advisors. These could be described as person-centred, holistic, tailored, strengths-based, empowering, straight talking and flexible:

*"**Personalised**, well-paced steps, and so much encouragement I thought I could achieve anything".*

*"Throughout her involvement with Routes a **strengths-based approach** was taken to ensure she remained in touch with her skillset, which was considerable. She often would feel unconfident and would frequently focus on the skills/experience that she felt she did not have rather than the transferable skills she had." (Case study)*

*"… recognise my own **strengths** and it was enabling me to unlock my creativity."*

*"Having the **flexibility** to be able to put support on hold until a time where they felt more able to engage was key." (Case study)*

Particularly important to achieving their goals was the person-centred and holistic approach of the Advisors, which recognised the wider needs of participants and helped them address barriers that were preventing employment or them moving closer to work. This involved working at the participant's pace and making referrals to other specialist services, such as counselling.

*"It hasn't just been **focussed** on work but also my personal life, but primarily focussed on work, but also looking at my unique situation… looked at career pathways, university, coping strategies, my mental health, counselling, positive thinking."*

"I was confused, unsure of what I wanted to do, wanted to move forward but didn't know how… I needed structure."

*"She felt vulnerable and felt that the **holistic approach** supported her well." (Case study)*

*"The process and outcomes are driven by the participants, and this has led to them realising opportunities that perhaps they would not if the approach was not so **person centred**." (Senior manager)*

Through this way of working some participants spoke about gaining greater self-awareness, which helped them along their Routes journey.

> *"It's been a good lesson going to Routes in looking at myself… being kind to myself and actually try to take small steps rather than large ones."*

> *"She's made me aware of certain things in my life that I can look at. It challenges me."*

Advisors often took an empowering approach, encouraging participants to do things for themselves rather than the Advisors completing actions for them. However, two participants reflected disguising their lack of confidence by presenting the opposite impression externally than they felt inside; and so rather than an empowering approach being what they required, they needed more collaboration:

> *"She told me to get in touch with these people – I rung them 4 times and left voice notes and was supposed to get a call back. She said you can do it... She makes it sound really simple and it's not. I don't know what I'm doing. I want to put the work in., but I still don't really know how to go about it… I think she thinks I'm more capable than I feel right now… I think I do need to speak up and say I need a bit more hand holding, and I've got a little nervous."*

One participant said that at times the Advisor took an overly empowering approach when they felt what they needed was hand holding:

> *"I can ring places myself, but my nervousness takes over a little bit, and if I don't get somewhere then I kind of give up. I need that bit of hand holding until things are in place and I can take over and do my own thing."*

Referral agencies reported that their clients were positive about the approach used by Advisors, they defined it as empowering, intensive, tailored, flexible, consistent, and structured. The referral agencies felt the holistic support Routes offered participants is something that will be lost.

4.9 Advisors' experience and networks

The Advisors in post during this evaluation all had extensive professional experience, were knowledgeable and highly skilled, and had established networks of contacts, which increased opportunities to broker support. One participant said of their Advisor, *"always making contact, offering opportunities and opening doors"* another said, *"I think she can open pathways to people."*

Advisors helped participants explore a broader range of ideas rather than a narrow focus and would make proactive suggestions, drawing on their wealth of knowledge:

> *"Always full of options – have you thought of this, do you want to give this a go?"*

> *"New opportunities and online courses have been useful... I like that you send me the courses that I can attend, and that I received my converted exam grades so I know what level I am and what I can apply for." (Form 1C)*

Referral agencies reported that their clients experienced the Advisors as skilled, informed, and knowledgeable.

4.10 Impact of the COVID-19 pandemic

The COVID-19 pandemic impacted participant experience in different ways. This issue is also discussed in the Casework Management section.

Some participants found it difficult to access support from Routes during lockdowns as they did not have the digital skills or IT equipment to migrate to online methods of engaging with their Advisor. Some temporarily disengaged as their mental health deteriorated due to COVID related anxiety.

> *"Lockdown implications have had an impact on progress. Anxiety about virus transmission, closure of face-to-face services and rising unemployment rates continue to impact him, and his motivations to change and find employment." (Case study)*

One participant experienced the pandemic as somewhat helpful. Her big goal felt distant with barriers that first needed overcoming. The COVID-19 pandemic slowed everything down and gave her time to improve her English.

During lockdown HKP undertook door knocking in their local community to check if their service users needed any help. Through that activity, people learned about Routes, and some were then referred into the project.

Many Routes participants were keen to return to face-to-face meetings once lockdown restrictions were eased. However, one Advisor continued to work solely online after lockdowns ended, and so for those keen to meet in person, this was no longer an option.

4.11 Diversity, Equity, and Inclusion

One of the two BBO cross cutting themes was 'Equality & Equal Opportunities'. The Routes project was aimed at unemployed or economically inactive people from certain target groups:
- people aged 50 or over
- people with disabilities
- people from ethnic minorities
- women (and men)

"I think that was our niche – we worked with people that other services just didn't have the skills, capacity, or patience to do… we are there for those who struggle with language, mental health, lack of skills and who haven't worked for a long time. For me that was literally the point of us." (Senior manager)

People with disabilities – mental health issues

All but one of the participants interviewed had mental health issues. Advisors supported participants to access counselling to address mental health issues, as well as providing direct support themselves whilst participants were applying and being interviewed for jobs:

> *"We have mentored and coached participants with mental health issues during recruitment processes which were successfully concluded with employment outcomes." (Annex B 2020 Q3)*

People with disabilities – additional needs

Some Routes participants experienced a high level of need around their Autism and ADHD, however, the Advisors found it difficult to secure specialist support in these areas. One Advisor

completed a Level 2 qualification to gain more in-depth knowledge around Autism, and the clinical supervisor delivered a training session to all three Advisors in working with Autism.

People with disabilities - deaf and hard of hearing people

One delivery partner recruited a British Sign Language volunteer to work with their participants.

People from ethnic minorities

Routes supported many people who were from ethnic minority communities, asylum seekers, refugees, and migrants.

> *"Brexit impacted on our ability to work with ethnic minorities. We were working in [an area] which had a high level of Polish and other eastern Europeans before Brexit. These populations diminished, although they are now growing back." (Senior manager)*

Asylum seekers and people who speak other languages often have complex needs. One Advisors worked in partnership with a local charity, Voices in Exile, that provide support to refugees, asylum seekers and those with no recourse to public funds. The Advisor supported the participants' employment related needs whilst the charity worked to address their wider needs. Having caseworkers from different organisations helped to ensure that the participant had increased support to work towards agreed Routes action plans. The Advisor joined the local ESOL network which increased her awareness of available ESOL courses, which in turn benefited participants who needed particular training and certification to help them achieve their goals.

When developing the ESOL IT course and Job Club at HKP, the addition of an interpreter enabled wider inclusion.

The Participants' Costs Fund was used on occasions to pay for documents to be translated.

Women

Routes support was of particular importance for women who were dependent on their husbands, awakening to the possibilities and opportunities available to them, *"[Participant] described a life that had little interest for her, and she felt stuck."*

One non-English speaker mother with parental responsibilities, with no recourse to her own money and therefore reliant on her husband's income, lacked support from family and peers. With support from her Advisor and the Participants' Costs Fund she studied a Level 1 ESOL course, started voluntary work, was provided with bus tickets, got a medical referral for a physical disability, and accessed a peer supportive group.

This was not a unique narrative; the evaluators heard a similar experience from another participant. Both gained a realisation that their lives could be different, they had the opportunity to identify goals which they believed they could achieve, which in turn gave them hope for the future.

LGBTQI+ identifying people

Sexuality or gender (beyond male or female) were not asked within the sign up / assessment process or required within BBO paperwork; therefore the Advisors were unaware whether they were working with any LGBTQI+ identifying participants, *"maybe ESF don't monitor it and*

therefore not interested." The partnership did not have a demographics monitoring form, *"we don't ask them how they identify themselves."*

One Advisor reflected:
> *"I like to think we are very accessible and do reach a lot of marginalised people… We've gone with a framework that's been given us, and it's quite a rigid framework from ESF. I think if we had started from scratch maybe equalities and all of that would be different… monitoring all that stuff and working with those group."*

The evaluators recommend that for any future project, a system is developed for monitoring the demographic data of participants, and this information is used to identify which communities and groups are not being reached by the project or are under-represented within the service. This should form part of a Diversity, Equity and Inclusion strategy.

4.12 Experience of achieving Results and Outcomes

All nine participants interviewed, unequivocally felt their needs were understood and met by the Advisors; although one participant recognised that had they been more open, they may have had their mental health needs better understood, *"I don't think I've been really honest about my mental health, my anxiety, and I think I'm just starting to voice that now."*

Some of the participants interviewed achieved their original goals:

> *"My Advisor helped me set everything up; voluntary work, which gave me a reference for Uni… An autism assessment, which meant I could access extra help at Uni… Experience in a restaurant so I can get a job whilst studying at Uni. I never thought I could get into that university, which is best in the country in this sector."*

Some participants did not achieve their original or long-term goals:

> *"Even though the goal [to find work] still needs to be achieved, I've done a fair bit of stuff, like volunteering… the allotment, that happened because of Routes… The actual end goal I didn't get to, but now I'm feeling more self-compassionate about that."*

One closed case was still on their journey when they left Routes, the project had helped them along their journey, but was not the end of itself. One participant was struggling with ambivalence about what they wanted to achieve. Others were still open cases with Routes at the point of being interviewed and were still working toward their goals.

For some people the Advisors helped them create ambitious long-term goals that were important; shaping their lives and giving them day to day structure, something to work towards, and having this gave them much needed hope:

> *"First time I realised I could probably transfer my qualifications to the UK… this gave me peace of mind, that I might be able to get a job in my field, I was much happier to know I would eventually have better quality of life than if I worked unqualified. This was the first time I had hope."*

Having access to the generous Participants' Costs Fund to unlock barriers to achieving goals was seen by all as beneficial to achieving outcomes. Referral agencies highlighted that the financial assistance given to clients to achieve their goals was both helpful, and fairly unique.

4.13 After care

The project introduced follow up contact with participants 3 and 6 most after closure. Although this was not the same as an initial period of in-work support which participants may benefit from, it was still valued: *"She appreciated the aftercare not just being left after gaining work." (Case study)*

Some participants contacted their Routes Advisor after closure if they needed one off advice or help. This not only reflected the strength of relationship with their Advisor, but also the importance of offering after care follow ups.

It is unquestionably due to the dedication and professionalism of the individual Advisors employed on the project during the final phase of delivery, and the commitment of the partnership organisations, that the nine interviewed participants and the case study participants, were so resoundingly positive about Routes, and for many, the huge impact it has had in their lives.
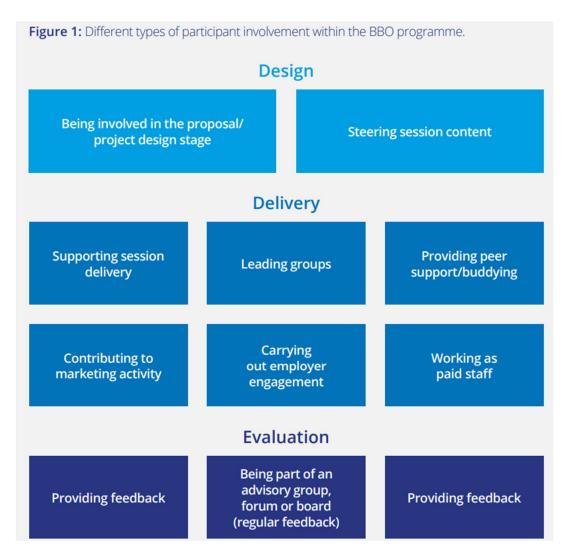
5. DATA ANALYSIS - PARTICIPANT VOICE

The data for this focus area is qualitative and comes from participant interviews, senior manager surveys and the Action Learning Session with the three Advisors.

5.1 Definition

The Building Better Opportunities (BBO) Participant Involvement Learning Paper [6] published in June 2019 by Ecorys, defines 'involvement' as a participant 'being involved beyond the planning and designing of their own employment, training or job search journey.'

For HKP and BHT participant involvement was established within their organisational practice, however, this was not the case for WEA. All three Advisors have service user involvement embedded in their experience.

The Learning Paper [6] explores a range of approaches being used to get participants involved in BBO programme projects and identifies the types of involvement possible (Figure 1).

Figure 1: Different types of participant involvement within the BBO programme.

Design
- Being involved in the proposal/ project design stage
- Steering session content

Delivery
- Supporting session delivery
- Leading groups
- Providing peer support/buddying
- Contributing to marketing activity
- Carrying out employer engagement
- Working as paid staff

Evaluation
- Providing feedback
- Being part of an advisory group, forum or board (regular feedback)
- Providing feedback

"Participants were actively involved in setting their own goals and were never passive recipients of the service offered by the Routes Project…" (Senior manager)

The evaluators sought to ascertain the extent to which Routes participants were involved beyond being solely a recipient within the project, and whether and how they had influenced project delivery, practice, processes, policy, or strategy development.

From the desktop research conducted at the beginning of the evaluation process, it was clear that despite the desire to leave a bottom-up legacy, participant involvement was not prioritised in this project. Early on the evaluators could not find many examples of participant involvement in practice and consequently this was the starting place in the Action Learning Session (ALS).

The ALS discussion reflected most of the types of participant involvement in Figure 1 above. However, it was agreed that underlying participant involvement, was the need to genuinely listen to the voices being heard and those voices should be able to influence decision making and affect change, thus being "voices in action".

Through the ALS, the evaluators were able to document what was already being done, and what could be done before the end of the project. For synergy, these are documented below adopting the descriptors from the framework in Figure 1 above. Finally, recommendations for any future project were created and are detailed later in this section.

5.2 Design

Design - Being involved in the proposal / project design stage

It was unclear from the first evaluation to what extent participant voice was built into the original bid, the evaluators asked the senior managers whether it was, and if so, what that looked like.

> "Service user involvement was a requirement in the approach to developing Routes, therefore individual partner service user feedback was used for the initial design of the project. There was not a formal project wide approach to service user involvement, rather that, individual partners developed their services with their own communities in the early stages and throughout." (Senior manager)

The first evaluation reported that:

> "Our vision is that a 'bottom up' approach, and the relationships we build with participants along the way, will create a legacy that embeds this kind of person-centred support into communities beyond the end of the project."

However, on-going participant involvement was not written into the design of this project. Therefore, despite some occasional, by chance opportunities for participants to support other participants, Advisors were unable to establish and embed in practice, any regular methods for participants to be directly involved in, or influence decision-making and affect changes around project delivery, practice, processes, policy, or strategy development.

> "I would say service user involvement was partially achieved." (Senior manager)

Design – Steering session content

This was not embedded across the programme. However, it was achieved in part by HKP which, in response to participant need, expanded their activity to include the ESOL IT course and Job Club.

5.3 Delivery

Delivery – Supporting session delivery

Routes participants were not involved in supporting session delivery. WEA were going to recruit volunteers to help deliver WEA courses, but they didn't achieve this, and once exit they had no process for following this up with ex-participants.

> "Volunteering as an outcome would have been useful. The model relied on recruiting some participants to work within it towards sustainability but, without having this as a formal outcome, the pressure to exit participants meant that they were not retained in this way." (Senior manager)

Delivery – Leading groups

The phase two evaluation recommended several ideas for giving participants the opportunity to voice their opinions and get more involved in the service delivery, for example through facilitating or co-facilitating groups, perhaps through IT or job clubs, which would afford participants self-development opportunities and help them increase their self-confidence. This did not happen.

Delivery – Providing peer support / buddying

The first evaluation suggested recruiting past participants as volunteers, to act as mentors or IT buddies. This has happened, but only on a limited number of occasions.

> "Where appropriate and possible, participants did get involved at service delivery level by sharing their skills to help each other achieve different aspects of their goals. For example, participants helping each other overcome language and IT barriers." (Senior manager)

> "One partner is developing peer support between former Routes participants and current participants where there is a similarity in journey and learning to be shared. Both parties have benefited from the peer support work, building confidence and networks." (Annex B 2020 Q4)

The Job Club at HKP provided participants with the opportunity to meet others in a similar position and gain meaningful peer support, which helped reduce isolation.

> "You can see peoples' confidence, and just knowing other people are in the same position is very powerful and helpful." (Advisor)

Delivery – Contributing to marketing activity

Community Works recruited a volunteer to gather participant case studies as a vehicle to engage potential participants to the project; these appear on their website and as such these case studies were specifically success stories.

One of the participants interviewed was asked by the Advisor to write a case study to reflect their story but they declined as they did not feel that they could capture their story adequately in writing.

Delivery – Carrying out employer engagement

Routes participants were not involved in employer engagement.

Delivery – Working as paid staff

Routes participants have not gone on to work for the project in a paid capacity. One participant undertook a voluntary work placement; to write a report around participant profile and achievements, to help inform Advisors' reach into specific communities.

None of the nine interviewed participants had been engaged in, or invited to be involved in, any 'Design' or 'Delivery' opportunities.

5.4 Evaluation

Evaluation – Providing feedback

At the start of their journey participants complete an assessment of their needs and barriers to employment on a Participant Journal form (Part 1C), which they also complete at exit. These forms sought to elicit participant feedback through the question: *'Are there any comments or feedback you would like to add?'*

The second evaluation recommended that Advisors find more ways in which to capture participants' voice. Advisors added a new question to the Part 1C form: *'If you could change or add something to the Routes Programme, what would it be?'*

Participants engaging in group work interventions such as HKP's Job Club were invited to complete a feedback form, and participants attending training courses offered by WEA were often asked to complete feedback forms.

During the ALS, the evaluators enquired whether there was a Routes complaints process and if that was used as a vehicle to gain feedback from disengaging or disengaged participants. The project had not received any complaints from those that were disengaging or had disengaged.

Advisors received feedback from some participants who requested that Routes accept re-referrals. This was also a view held by the Advisors:

> *"Based on participants feedback and what we know about their experiences, we want to accept re-referrals, it's unrealistic to think people will be totally fine once they exit the service or start a job."*

The evaluators would recommend that any future project design includes accepting re-referrals.

Evaluation – Being part of an advisory group, forum or board (providing regular feedback)

Routes participants were not invited to join an advisory group, forum, board, or similar evaluation opportunity.

> *"Participants had little opportunity to influence or make changes at a system level for the project – there was no representation from participants at partnership meetings and they had no opportunity to input into the administrative processes that were expected of them." (Senior manager)*

Evaluation - Taking part in peer led research

The text box in the bottom right-hand corner of Figure 1 should read "Taking part in peer led research', however, the Learning Paper document reads 'Providing feedback'; the evaluators presume this is a mistake. This participant involvement method was not adopted by Routes.

By virtue of agreeing to contribute to this and the previous two evaluation, either as interviewees or case studies, participants had been involved at an 'Evaluation' level. With the two previous evaluations, the participants had the opportunity to influence design and delivery of this project, however with this evaluation, their influence is limited to potential future delivery.

5.5 Actions for final months of Routes

Following the ALS, the evaluators proposed several actions for the Advisors to consider for the final months of the project, these were:
- Add Participant Voice as a regular item to the team meeting agenda to ensure that this is regularly and routinely discussed
- Consider how to ensure participants are aware of ways to give constructive feedback, including making the complaints process explicit and available
- Close the feedback loop at both participant and project level, e.g., 'you said, we did'
- Consult participants to determine interest in, and a preferred mechanism for establishing peer support that continues between participants beyond the end of the project

This last point was also suggested by a senior manager:

> *"With the benefit of hindsight, we might have created a social group for ex-participants to form a community to provide peer-support beyond the life of the project."*

The evaluators were mindful that when the ALS was being delivered it seemed unlikely that the Routes project would be sustained, and therefore there was little time to implement actions or make significant improvements to participant voice and involvement.

5.6 Recommendations for a future project

The evaluators make several recommendations to enable participants to have a stronger voice in any future project. These relate to taking a bottom-up approach to service modelling and embedding participant involvement in the project.

Bottom-up approach to service modelling

- Engage specialist professionals around good practice in participant involvement and influencing, in the planning stages and throughout lifetime of project
- Consult all intended beneficiary communities of interest
- Consult those the Routes project did not reach, or may not have reached, e.g. LGBTQI+
- Consult potential participants from within all partnership delivery organisations
- Consult around the participant profile to ensure their support needs are fully understood and the service model and resources will adequately match their service needs
- Involve potential participants in the design of project outputs / activities
- Involve potential participants in determining the outcomes, e.g. what is a significant achievement for them

- Involve potential participants in determining the parameters of support, e.g., re-referrals and extend support beyond securing work
- Invite potential participants to get involved in helping write grant applications

Embed participant involvement in the project

- Engage specialist professionals around good practice in participant involvement and influencing, in the planning stages and throughout lifetime of project
- Invite participants to determine a governance mechanism they want to be involved in, e.g., a steering group, and provide the support and resources they require to enable that to happen
- Involve participants in the process of creating policies, procedures, and impact assessments
- Working with interested participants, develop opportunities for them to help deliver project outputs / activities
- Ensure peer support opportunities are available, informed by, and ideally led by participants
- Ensure appropriate opportunities are promoted and used to regularly capture and learn from formal and informal participant feedback
- Always close the feedback loop
- Working with interested participants, develop opportunities for them to be involved in project evaluation
- Involve participants in staff recruitment and staff appraisal processes
- Connect participants into service user involvement opportunities in the partnership organisations
- Ensure participant voice directly informs funding organisations' intelligence and decision making around designing future funding models and schemes

"In future bids we would welcome the opportunity to take a co-production approach, so participants had the opportunity to share control over the design and delivery of any new project." (Senior manager)

6. DATA ANALYSIS - OUTCOMES

6.1 Context

The quantitative data for this section was drawn from the documents Routes used to report to BBO (the Annex E's). The qualitative data was drawn from previous evaluations, BBO documents, participant interviews, case studies, participant Part 1C's, Advisor interviews, and surveys from senior managers and referral agencies.

The starting place for this focus were the previous evaluations; the first of which stated that:

> *"The undoubted success of Routes is somewhat undermined by the nature of the current outcomes and the way they are measured."* (3.6.6)

The report questioned whether the outcomes were the right ones, it identified inconsistencies in the way the data is captured, and it suggested that changes were needed. The evaluators address each of these points in this section, where relevant, e.g., when raised by contributors.

The evaluators' view is that the BBO terminology used for this project has caused confusion about what the outcomes are and how they are measured; those relevant to this section are: "outputs", "results" and "outcomes", as specified in the BBO Glossary of Terms. The evaluators recommend for any future delivery partnerships enter into dialogue with the funders around adopting more appropriate terminology.

It is clear from the reporting documentation that Routes met many targets that were set in the early days and re-forecasted through the lifetime of the project. Although it hasn't always met the targets, it is clear that it has worked with the right sort of people, to achieve the right sort of changes, and it has done so in a way that has changed the lives of those individuals.

The overall success of this project cannot be overstated, given that it has operated in such unprecedented times. The COVID-19 pandemic alone could easily have derailed the project entirely and had a devastating impact on achieving results and outcome targets:

> *"The impact of COVID on both project delivery, staffing and participants should not be underestimated. For a while it eroded our ability to deliver."* (Senior manager)

There were changes to targets set out for the project in the early years of delivery, which recognised an evolving understanding of the *"demanding administration of evidential based activity and the complex needs of those less engaged."*

> *"The project was open to a wide range of individuals with very differing needs. Each participant is different and not all require intensive support, whilst others require a more dedicated approach."* (Senior manager)

In the final phase of the project, the Advisors broadly felt the outcomes were the right ones. However, they did suggest improvements were needed to better reflect the achievements participants made that positively impacted their lives.

In this section, the success of the project is broken down by outputs, results, and outcomes, and data is provided for the project life course, 2021, as well as the final year of delivery. Because the Routes delivery years match a calendar year, when this report refers to 'the last year of delivery', this includes January - September 2022, so instead of being a whole year it is just the first three quarters.

In the tables in this section, the actuals are colour coded: green to signify targets being met and red to signify them not being met.

6.2 Outputs

BBO defines "outputs" as *"things like employment status, age, education and household situation"* that are collected when a participant first joins the project. This is what is used here. The evaluators prefer the term 'demographic data' to fit this definition and consider "outputs" to refer to services that are being delivered e.g., casework support and drop-ins.

It is worth noting here that some of the demographic data used in the outputs section also related to barriers to employment. For example, the project had output targets for over 50's, people with disabilities and people from ethnic minority communities because they are seen to be additionally disadvantaged in the labour market.

As detailed in Table 1 below, in 2021 the project only met two of their output targets; working with women (192%) and with economically inactive people (167%).

They underperformed on most of their output targets; for numbers of participants generally (78%), working with unemployed people (60%), working with people from ethnic minority communities (56%), people over 50 (45%), men (41%) and people with disabilities (41%).

One contributing factor to the under-performance was the COVID-19 pandemic, which adversely affected the project in different ways, including:

> *"Partners report that Job Centre referrals have almost dried up with other pressing priorities during this quarter, and with the hard lockdown networking has been increasingly difficult." (Annex B 2021 Q1)*

The team made a concerted effort to target promotional material to these under-represented groups – see section 4.11 for more information, and in 2022, they also met their targets for numbers of participants generally (219%), working with men (127%), unemployed (156%), and working with ethnic minority communities (156%).

Although they did not meet all of their target outputs overall, over the life course of the project, they were not too far off meeting their targets for all groups: men (90%), unemployed people (98%), the over 50's (83%), people with disabilities (86%), and people from ethnic minority communities (96%).

Over the lifespan of the project, Routes achieved their targets for overall number of participants (104%), working with women (119%), and working with economically inactive people (114%), but fell ever so slightly short of all arguably one of the most important targets which was to work with unemployed people.

Because over the project life course, the number of female participants was high, in the final year of delivery there was no corresponding target set as Table 3., shows. Table 3. also shows that this adjustment meant that the target for working with men was achieved.

When numbers for certain groups were high, the team were able to re-forecast their targets as is the case with working with women; because numbers were high in 2021, they were not targeted at all in 2022. Similarly, because over the project life course, numbers of participants who were economically inactive were high, there was no corresponding target in the final year, and in this final period, there was an improvement in numbers who were unemployed (156%).

Although Advisors were able to publicise and promote their service to specific groups who needed targeting, they were not in control of who got referred to them and this caused a tension that might have needed more proactive management; between who they needed to work with (e.g., men) and who got referred to them (e.g., women).

As recommended in 4.11 Participant Experience, that both a demographic monitoring process and a Diversity, Equity and Inclusion strategy be developed to support meeting target outputs.

Furthermore, this links to the evaluators recommendation already noted in section 3.1 Casework management regarding the benefits of having a centralise referrals and triage function to enable more proactive oversight of referrals against target outputs.

6.3 Results

The project was successful meeting its target "results" in 2021, in 2022, and although they did not meet the targets every quarter, they have over the lifetime of the project. See Table 2.

This success was broadly recognised by the Advisors; despite not knowing explicitly:

> *"We have got a fair number of participants into work and into learning and job searching…. I think we are meeting our targets, my manager said we were."*

The terminology adopted by BBO has been challenging throughout this evaluation, particularly relevant to this section; BBO define "results" as *"the participant's achievements due to them being engaged on the project",* whereas the evaluators regard these as "outcomes".

Comparing the target results columns for 2021 and 2022 it is evident that numbers were reduced, both because the project was on track to meet its targets, but also as the project was winding down.

Each of the three results from Table 2 above, is outlined below, along with qualitative data drawn from this evaluation, to support and in some cases explain the success.

The number who move into education or training on leaving

The project met the target in 2021, which was to support 23 participants into education or training (100%), they also met this target in the final 9 months of delivery throughout 2022, which they exceeded by 11 participants (222%). They also achieved it over the project lifespan (105%).

By far the most frequent characteristic cited by referral agencies that made Routes unique was: *"easy access into training"*; both accredited courses that led to qualifications and short courses that supported individuals in their career pathways.

Training undertaken was usually on the journey towards paid work, however, for some that goal was long term:

> *"They helped set everything up for university; voluntary work, a reference, an autism assessment so I could get help, and work experience so I could get a job." (Participant)*

Table 1. Target OUTPUTS for 2021, 2022 (final 9 months) and across the project lifespan

	2021			2022 (Final 9 months)			Project lifespan		
	Target	Actual	% of target achieved	Target	Actual	% of target achieved	Target	Actual	% of target achieved
Total participants	54	42	78%	16	35	219%	351	364	104%
Men	41	17	41%	15	19	127%	175	157	90%
Women	13	25	192%	0	17	N/A	175	208	119%
Unemployed and long term unemployed	45	27	60%	16	25	156%	232	228	98%
Economically inactive including not in education or training	9	15	167%	0	10	N/A	119	136	114%
Aged over 50	38	17	45%	15	9	60%	145	121	83%
With disabilities	51	21	41%	19	12	63%	218	187	86%
From ethnic minorities	18	10	56%	9	14	156%	72	69	96%

Table 2. Target RESULTS for 2021, 2022 (final 9 months) and across the project lifespan

	2021			2022 (Final 9 months)			Project lifespan		
	Target	Actual	% of target achieved	Target	Actual	% of target achieved	Target	Actual	% of target achieved
The number who move into education or training on leaving	23	23	100%	9	20	222%	92	97	105%
The number of unemployed who move into employment, including self-employment, on leaving	12	13	108%	2	2	100%	54	57	106%
The number who were economically inactive who move into employment, including self-employment, or into job search upon leaving	6	9	150%	1	2	200%	56	62	111%

The first COVID-19 Lockdown put an end to face-to-face learning and many participants were unable to continue their courses. Participants engaging with other providers of, for example higher or further education, were at the mercy of those institutions. However, for short and informal courses, Advisors very quickly adapted to finding other ways of learning, such as online or postal learning, and even learning by phone.

Where participants secured work placements and internships and were then exited from the project, these were recorded under this result, despite not really being education or training. For future delivery, the evaluators would separate these out into an unpaid employment result.

Unemployed participants into employment, including self-employment, on leaving

The project achieved this target in 2021 (108%), in the last 9 months of delivery (100%) where the target was only two participants, and although they did not meet the target every quarter, they did exceed it across the lifetime of the project (106%).

One of the major challenges of the work toward this outcome, was taking the final step into employment:

> *"Getting people into work is the hurdle, they get to a certain point and you have to have conversations – "you're just not taking that final action to get into work" … "(Advisor)*

One of the discussion points in the Advisors' interviews was the role of the Employment Broker, which was in place for a while but then finished. For the most part the connectivity with local employers was viewed as vital to helping find employment opportunities for people, however, there was little time for Advisors to do this sort of work themselves. The evaluators would recommend that this role be carefully considered for any future delivery as this was seen as crucial to securing successful employment opportunities for participants.

All three Advisors discussed parallel planning needed to work on participants longer term goals to finding employment in a specific, perhaps professional field, which may have been a bit longer term, and shorter-term goals of needing to find them work, any work.

> *"Some of the outcomes would have been straightforward to reach like getting people into job searching or getting people into education, they're quite easy. For me it needs to be about meaningful opportunities that will make a difference long term." (Advisor)*

The ability to work on two or sometimes three pathways at once was noted by many participants, especially those with professional qualifications from abroad or for those needing to obtain professional qualifications.

> *"Working out how to transfer my qualifications to UK was not easy, hard finding out on the internet. Long term goal was to get into qualified work but in the short term I would have to get into a job, any job, before finishing English; three plans." (Participant)*

Some referral agencies stated that the results and outcomes that Advisors achieved with their participants also helped them achieve their organisational outcomes. Some, although not all, were also working to support people into work or training, such as the Job Centre.

Economically inactive into employment, self-employment, or job search on leaving

The project met this target in 2021 by helping nine rather than six economically inactive participants into employment, self-employment, or job search on leaving (150%).

They also met this target in the last nine months of delivery in 2022 with two rather than one participant (200%).

And although they did not meet this target every quarter over the lifetime of the project, they did exceed this target overall, for 62 rather than 56 economically inactive people (111%).

> *"If I hadn't contacted Routes, I could see myself sat here without having looked for work… I've moved on immeasurably… a catalyst for the positive change." (Participant)*

Some participants job searched through their journey with Routes, however, because they are not exited or closed at that point, this work is not recognised.

For participants who were far from the labour market, getting into a position where they can look proactively for a job, was difficult enough. Advisors frequently reported how they often found themselves supporting participants in other areas and whilst this was perceived to be a necessary part of the role, this boundary required close monitoring:

> *"Some people almost need a care coordinator but that's not my role,*
> *you have to be careful of it not morphing into that." (Advisor)*

For such participants, the outcomes achieved were less employment related but did still enable them to take the next step. One Adviser worked with Dyslexia Unlocked to arrange a dyslexia/neuro-diversity assessment for a participant, and this specialised piece of work allowed Routes to liaise with psychologists directly, offering a more tailored and cost effect way to achieve an outcome. (Annex B 2021 Q3)

Six participants had worked with the Job Centre to job search; over half were very negative about their experiences; they described the Jobcentre as unhelpful, unsupportive, judgemental, disconnected and "tick-boxy". Participants acknowledged Routes' "*personalised, tailored approach, you felt unique and not just a statistic." (Participant)*.

6.4 Outcomes

Advisors used the term "soft outcomes" to describe what BBO defined as "outcomes":

> *"Softer outcomes … like improved well-being, should be recognised more." (Advisor)*

A senior manager used the term "formal outcome" *as in "volunteering was not a formal outcome for BBO"* when what they meant was a "result". And Advisors used the term "outcomes" to describe what BBO define as "results":

> *"All the questions: did you do a course, did you get a voluntary job, did your confidence increase, do you feel more resilient, do you feel less isolated - all the stuff on the Part 1C, the scaling questions, should be outcomes to report on."*

For future projects the evaluators recommend that to avoid confusion, any changes the project intends to achieve are referred to as outcomes and that if these must be prioritised, they be referred to as "primary outcomes" and "secondary outcomes".

Table 3 shows that the project had four outcomes. Every outcome had multiple outcomes in one, e.g., Outcome 2 includes increased social inclusion, improved well-being, and moving closer to work, despite there being no direct correlation between the elements. This makes it difficult to clearly record what is being met. Each outcome also has several indicators, despite

there being no direct correlation between the elements e.g. receiving Information, Advice and Guidance (4.1) and increased employability (4.3).

For future delivery, the evaluators recommend using only singular outcomes with indicators that can only be achieved on the road to that outcome. For example, writing or updating a CV is an indicator of moving closer to work. To support development of clearer outcomes the evaluators recommend creating a theory of change or logic model from the outset of project design.

It is also worth noting here that the methods used to capture some of these outcomes were not helpful and the evaluators recommend that for future delivery, exploring more qualitative methods of evidencing these especially those that are less tangible, e.g., ability to handle setbacks, improved well-being, and increased self-confidence.

The following pages consider the project's success against each outcome, noting interesting data against indicators. As Table 3 shows, the project did not perform well against outcomes targets in 2021. Performance in 2022 was better (they met five of the twelve outcome indicator targets) and better still across the lifespan of the project (they met six of the twelve outcome indicator targets).

Outcome 1. Address at least one barrier preventing employment and increasing resilience

In 2022, 32 participants were *"supported to identify barriers to employment and put a plan in place to address them"* (1.1) against the target of 16, double the number (200%).

The Form 1C's recorded the participants barriers, for many, these barriers were multiple:

> *"Recognising the multiple barriers that need to be moved step by step and therefore it can take a long time… getting external support too is helpful."*

35 participants were supported to successfully remove at least one barrier (1.2), against a target of 16, this is over double (219%).

> *"…The first two barriers were overcome with work opportunity and learning opportunities"* (Participant)

One of the barriers faced by participants was poverty and this impacted participants ability to pay for courses, materials, equipment, and other items that would help them on their journeys.

This is particularly important and a recommendation for any future delivery because poverty in the current economic climate is going to present a genuine barrier for those needing to seek employment. The project has embedded within it a generous Participants' Costs Fund to support this effort.

OUTCOMES

Table 3. Target OUTCOMES and performance indicators for 2021, 2022 (final 9 months), and across the project life span

	2021			2022 (final nine months)			Project lifespan		
	Target	Actual	% of target achieved	Target	Actual	% of target achieved	Target	Actual	% of target achieved
Outcome 1. Address at least one barrier preventing employment and increasing resilience									
1.1 Supported to identify barriers to employment, put a plan in place to address them	54	42	78%	16	32	200%	351	364	104%
1.2 Supported to address at least one barrier to employment	54	42	78%	16	35	219%	351	364	104%
1.3 Report increased ability to handle setbacks	25	20	80%	2	0	0%	155	157	101%
Outcome 2. Experience increased social inclusion, improved well-being, moving closer to work									
2.1 Engaged in learning, training or work placement	54	42	78%	16	35	219%	351	364	104%
2.2 Report meeting new people, increasing social networks and starting volunteering	26	21	81%	6	0	0%	155	151	97%
2.3 Report improved well being	27	18	67%	10	0	0%	170	158	93%
Outcome 3. Improved work life skills & increased capacity for independent activity									
3.1 Supported to access learning, training or work placement opportunities	54	42	78%	16	35	219%	351	364	104%
3.2 Increased ability to access learning, personal development and employment	38	21	55%	6	0	0%	170	154	91%
3.3 Improved work life skills	34	18	53%	15	0	0%	165	142	86%
Outcome 4. Increase employability and self confidence									
4.1 Engage in learning, Information, Advice & Guidance sessions, & work placements	54	42	78%	16	32	200%	351	361	103%
4.2 Increased self-confidence	33	19	58%	14	0	0%	190	171	90%
4.3 Increased employability	33	22	67%	11	0	0%	190	176	93%

The Participants' Costs Fund funded:

- Hardware (laptops, dongles etc)
- Computer software (Microsoft packages)
- Courses
- Gym classes
- Travel on public transport
- Desk & chair
- Work clothes
- Childcare

> *"On the Journey to Work project, working with Routes helped our clients move closer to work. This was through ongoing support for clients who need your specialist help and financial assistance for the purchase of a PC to complete job searches and applications". (Referral agency)*

This fund was recognised by all as a unique selling point, including by many of the referral agencies who recognised the financial assistance helped their clients achieve their goals.

> *"Our budget's flexibility set us apart from all the other projects. We were able to have real impact on our participants' lives by helping them to reduce and in some cases overcome the black hole of poverty. We were able to pay for key services, items and training that helped our participants to overcome barriers, get closer to the job market and secure jobs." (Advisor)*

Despite being incredibly useful in removing barrier for participants, especially where poverty was an issue, Advisors said it was very long and time consulting, having to get three quotes, lots of bureaucracy, and it should be made easier to access.

In the final year of delivery, no participants reported "increased ability to handle setbacks" (1.3). Over the life course of the project, this outcome indicator was achieved.

Outcome 2: Increased social inclusion, improved well-being, moving closer to work

In the last year of delivery, the project was able to support 35 participants into learning, training, or work placements (2.1), against a target of 16. They met this target by 219%. The team also did well over the lifespan of the project, supporting 364 participants engaged in learning, training, or work placements against a target of 351 (104%).

> *"With support [the participant] gained motivation and confidence to start own business Routes paid for "Starting your own business" course through the MET, wrote a business plan, which helped her sort insurance and business cards." (Advisor)*

The above is an example of a situation in which getting someone on to a course was not counted as a "result", since the participant was kept open because they were expecting to start their own business, which would have counted as a "result" instead.

Table 3 shows that in 2021 the project nearly met outcome indicator 2.2 by supporting 21 participants, against a target of 26 (81%), reporting to have met new people, increased social networks, and started volunteering (2.2). In 2022 they recorded zero against a target of 6; they were very close to meeting this target over the projects' life course (97%).

"[I began] feeling more able to leave the flat to attend meetings or volunteering which I could not do before Routes…. Having external input increases self-awareness. Leaving the flat, connecting with other humans meant I was less isolated." (Participant)

"His confidence was built from the friends and individuals he met during his time at Routes." (Case study)

Work placements, voluntary work and internships are all unpaid, work-focused activities and yet they are all recorded differently. Work placement feature in 2.1, 3.1 and 4.1. Volunteering features in 2.2 and internships don't feature at all. Additionally work placements and internships can count as a "result" under the education and training "result" if the case is closed.

Volunteering was perceived by Advisors to be an important outcome on the journey to paid employment because sometimes part time, or even full-time work, is not viable, and so they believed it should be included as a "result" in and of itself.

One participant lived in supported housing where paid work would have meant his rent was unaffordable, so volunteering was the only viable work on his road to living independently.

"Volunteering should be an outcome…. To expect people that far from the labour market to go straight into work without doing volunteering is an unrealistic expectation" (Advisor)

Volunteering for Routes specifically was built into the original project as one of the main methods of participant involvement, however this did not happen:

"Because volunteering was not a formal outcome for BBO, we needed to exit participants into progression outcomes, rather than retaining them, so this element was lost... Without continuation funding the project cannot survive in its present form. If volunteering had been built into BBO outcomes then we could have developed volunteer led support structures, or community groups." (Senior manager)

The lack of clarity around reporting volunteering opportunities, work placements and internships, and the apparent similarities between them all, leads the evaluators to recommend that for any future delivery, all three are counted as primary outcomes and specifically, under the same outcome area.

Advisors also suggested that job search should be a result in and of itself, and not just for participants who are exiting the project, this activity was a long way off for some and yet the benefits were immense:

"Frequently the participants attending Job Club will attend the computer drop in and IT courses. Having familiar faces in the groups is supportive and helped people gain confidence and remain well engaged with our service provision." (Advisor)

Table 3. shows that over the lifespan of the project, the team did a great deal of work to support participants around their mental health and wellbeing (2.3), however they just fell short of meeting this target 93%.

"It's been a good lesson … in looking at myself… being kind to myself and trying to take small steps rather than large ones ... The realisation that you need to spend as much time working on your wellbeing as job searching… I'm still in therapy and I'm on a journey, but I'm still not in work yet." (Participant)

Outcome 3. Improved work/life skills, and increased capacity for independent activity

In 2022, the project supported 35 participants to access learning, training, or work placement opportunities (3.1) against their target of 16 (219%). It is not clear why they did not also achieve 3.2 which was participants reporting an increased ability to access such opportunities or 3.3 improved work life skills. Given that they performed well on these indicators over the life course (91% and 86% respectively), perhaps this was because of nuanced changes in reporting.

One participant said:

> *"Routes paid for my Monitoring and Evaluation course, which was amazing, this course was amazing… having that in my portfolio is a real strength as it enhances my natural risk assessment capabilities and in the context of disaster relief and humanitarian crisis response, this is vital... it also really helped me get back into volunteering in the field."*

Rather than achieving this outcome, one participant found more self-compassion. Finding work felt like *"chasing a butterfly"* always out of reach and unattainable. He did some volunteering, and joined an allotment project, so he gained much needed structure in his life.

Outcome 4. Increasing participants' employability & self confidence

Table 3 shows the project did achieve the target for engaging participants in learning, IAG or work placements over the lifetime of Routes (4.1), and did so in 2022, with 32 participants against a target of 16 (200%).

In 2021 only 19 participants reported increased self-confidence (4.2) against a target of 33 (58%) and in 2022, despite having a target of 14, no participants reported this. Over the project lifespan, the success rate with this indicator was much higher (90%) as 171 participants reported increase self-confidence against a target of 190.

Referral agencies mentioned Routes helping their clients with other things; relevant to this section was increased self-development, and encouraging independence, they found this particularly so for those who do not have English as their first language.

In 2021, only 22 participants reported increased employability (4.3) against a target of 33 (67%) and in 2022, despite having a target of 11, no participants reported this. Over the project lifespan, the success rate with this indicator was also higher (93%) as 176 participants reported increased employability against a target of 190.

> *"She reassured me; 'you are organised and self-disciplined, you have talent', helped me realise that getting into Uni was something I could do. She gave me confidence... She takes time to understand, break things down into understandable steps, she made me question how far could I go? She gave me the confidence I needed to build up my connections to help me get to where I wanted to be." (Participant)*

In relation to the outcome indicators that were not achieved in 2022, the evaluators wondered if this was because the Advisors were doing more short-term focused work towards the end of the project.

> *"At this stage my work is so much more focused… I'm not trying to address all the multiple needs… So now it's getting people in, being very focused, close." (Advisor)*

The Advisors' interviews raised the inherent challenges of using ratings to capture progress towards outcomes, as with those used on the Part 1C forms. The extent to which ratings

adequately capture progress, was questioned by all, despite the fact that numbers are perceived to be objective, peoples' feeling about themselves and their progress is subjective. It was noted that capturing less tangible things like confidence and self-esteem were particularly challenging and it was felt that not enough qualitative data was collected to evidence these outcomes.

6.5 Diversity, Equity, and Inclusion

At this point, it is worth noting that a third of those gaining employment were from ethnic minority communities, and this is significant because they represented only 19% of Routes participants overall, based on the participant outputs.

Historically the project struggled to engage people form ethnic minorities, however, Advisors worked hard by working with other services such as Voices in Exile and the Migrant ESOL Support Hub, and this helped them overperform in these areas.

There have been multiple pieces of work to enhance performance in this area, for example Advisors have supported participants with English as a Second Language to access training and certification to prove their proficiency in English language (Annex B 2020 Q3).

6.6 Closing cases

All three of the results related only to the point of being closed, which often presented a huge dilemma for the Advisors:

> *"You might hang onto a client because they might get a job… you haven't a crystal ball, how long do you keep hold of them in order for them to get work? Because it might be you close them, and then 2 weeks later they get a job… and you can't claim that as an outcome... It's about getting the right balance between long and short term goals, on-going review and figuring out when to close them" (Advisor)*

Quite often, people find a course to do that is short term and they perceive that as just a small part of their journey, not an end in and of itself:

> *"Often it is a subtle thing that has changed for someone, but it's huge for them… 'I've gone to that course, and I feel so much more confident to go to another course'… or they're getting out of their house once a day, that kind of thing." (Advisor)*

This is particularly important given the inability to take re-referrals, e.g., someone is not able to return to working with the project when their short-term course has finished.

The evaluators would recommend that for future delivery, more thought be given to splitting results/outcomes up into smaller ones that participants can achieve on their journey, and the larger and more long-term ones that would see them into a more secure position in future.

6.7 Disengaged participants

The evaluators sought to understand not only the positive experiences of Routes but the negative ones also, however, finding ways to collect this sort of data was challenging. The project had only seven participants disengage in the final year of delivery, and this was not unusual compared to previous years. The highest disengagement happened in the early stages of WEA delivery, which was picked up early on and rectified.

Over the last year of delivery, some participants disengaged as early as two months into the project, and some disengaged after more than two years, the average was around 11 months, and there was little difference between the delivery partners.

Seven disengaged participants were contacted by the evaluators to ask if they would give feedback about their reasons, none of them opted to do so. Therefore this evaluation cannot provide any explanations as to why participants disengaged, other than from the Advisors' perspectives.

The Advisors suggested that clearly, not everyone that comes across Routes is ready or prepared for the work that needs to be done towards the goal of finding work and for some people, their circumstances changed so that they were unable to continue to engage. The evaluators noted the absence of any Advisors identifying as male and considered whether this may have helped engage more participants engaging with Routes.

As a closing comment for this section, it is worth returning momentarily to the topic of outcomes, to acknowledge that the Advisors worked tirelessly to help their participants achieve their personal goals and despite working in extremely challenging times and with very complex caseloads, they did an amazing job. Community Works summed this up well:

> *"…Our partners ability to provide the required evidence [to achieve] incredible individual outcomes, supported by strong performance against targets, superb achievements, even through a pandemic."*

The Advisors have the evaluators credit and respect for delivering such an impactful project.

7. RECOMMENDATIONS

7.1 Relevant recommendations from phase one evaluation

The evaluator made several recommendations, referred to as 'Next Steps', in the section titled 'Learning from the Routes experience', those still relevant were explored in this report:

- Volunteering to be considered an outcome or result for future delivery
- Did the outcomes need adjusting? E.g., measurement and recording
- Evidencing success by reviewing 3-months after exit
- Ex-participants to be recruited as peer mentors

7.2 Relevant recommendations from the phase two evaluation

The second evaluation made the following recommendations that were actioned, whether this was as a direct result of the evaluation has not been determined:

- Improving support for Advisors to manage cases (see Caseload management)
- Advisors to deliver more confidence building activities (see Participant Experience)
- Improve participants digital inclusion (see Casework Management)

Recommendations that were relevant but not actioned:

- Clarify referral criteria to increase influence on referrals
- Employer Engagement
- Upgrade the current database to enable more effective casework management
- Increase opportunities for peer support and participant involvement
- Utilise aspects of the Employment support model

7.3 Recommendations for any future project following the closure of Routes

Throughout this report the evaluators make recommendations are summarised here for ease:

Casework management recommendations

The evaluators recommend that for any future project design, in relation to effective caseload management, that due consideration is given to the merits of operating a project that seeks to support people who are both close to and also furthest from the labour market or whether it would be more beneficial to deliver these two projects separately.

Referrals and triage

The evaluators recommend that for future delivery, that further consideration be given to the participant profile; specifically the need for participants to be unemployed or economically inactive in the strictest definition of the sense. This could include flexing the eligibility criteria to include, for example, people who are self-employed or on zero hours contracts.

Also, and perhaps easier to establish, would be to have a referral form and a centralised triage function to offer the team more control over referrals, this would help them balance the sometimes extremely high levels of client need with the need to meet target outcomes.

Support with casework

The evaluators recommend that for future delivery, the Advisors' working environment is carefully considered; they seem to be best placed within community organisations, based in community venues, within geographical communities. However, the remote working element helped them reach people who are not local or who have accessibility issues and so a hybrid model is recommended. Further consideration should be given to how the teams are configured and the relative associated merits for teamwork, support, and casework management.

The evaluators believe that staff training, development and support are all considered essential to on-going professional practice, and they recommend it is budgeted for and set up from the outset. Staff should have regular line-management supervision, to ensure caseload management from an organisational and partner perspective. Staff should have regular team meetings to ensure that caseloads are managed form a project-wide perspective. Staff should have regular reflective or clinical supervision, or both to ensure more in-depth discussion is possible to process their work challenges. Clearer definitions should be available, regarding each casework management function and guidance about what should be taken where.

Paperwork and processes

The evaluators recommend that for future delivery, that in the project design phase an Environmental Impact Assessment is carried out to identify 'greener' ways of working. This includes specifically that careful consideration should be given to participant paperwork; to what is essential, making forms more succinct, avoiding duplication, and ensuring paperwork is well-timed. Especially for people who need a quick start or a small piece of work.

Similarly with project administration paperwork, they recommend that more processes are migrated to electronic, on-line systems, reserving paper copies for those considered digitally excluded, and that wet signatures are not considered necessary.

Closing cases

The evaluators recommend for any future delivery that Advisors should have the freedom to open and close cases, and to accept re-referrals, as is needed to enable them to better manage their caseloads and better support participants as and when they are ready. In addition, where participants start employment, Advisors should be able to leave their cases open for longer to ensure that they are settled into work and able to remain in work, before closing them.

The evaluators recommend that outcomes / results should not just be on closure, as this puts pressure on Advisors to close people before they are ready, and instead recognise all outcomes / results throughout the participants journey towards work.

Participant Experience recommendations

Choice

The evaluators recommend implementing a central referral and triage function that enables new participants to be matched to the service delivery model that best meets their individual circumstances and needs.

Diversity, Equity, and Inclusion

The evaluators recommend that for any future project, a system is developed for monitoring the demographic data of participants, and this information is used to identify which communities and groups are not being reached by the project or are under-represented within the service.

Participant Voice recommendations

The evaluators make several recommendations to enable participants to have a stronger voice in any future project. These relate to taking a bottom-up approach to service modelling and embedding participant involvement in the project.

Bottom-up approach to service modelling

- Engage specialist professionals around good practice in participant involvement and influencing, in the planning stages and throughout lifetime of project
- Consult all intended beneficiary communities of interest
- Consult those the Routes project did not reach, or may not have reached, e.g. LGBTQI+
- Consult potential participants from within all partnership delivery organisations
- Consult around the participant profile to ensure their support needs are fully understood and the service model and resources will adequately match their service needs
- Involve potential participants in the design of project outputs / activities
- Involve potential participants in determining the outcomes, e.g. what is a significant achievement for them
- Involve potential participants in determining the parameters of support, e.g., re-referrals and extend support beyond securing work
- Invite potential participants to get involved in helping write grant applications

Embed participant involvement in the project

- Engage specialist professionals around good practice in participant involvement and influencing, in the planning stages and throughout lifetime of project
- Invite participants to determine a governance mechanism they want to be involved in, e.g., a steering group, and provide the support and resources they require to enable that to happen
- Involve participants in the process of creating policies, procedures, and impact assessments
- Working with interested participants, develop opportunities for them to help deliver project outputs / activities
- Ensure peer support opportunities are available, informed by, and ideally led by participants
- Ensure appropriate opportunities are promoted and used to regularly capture and learn from formal and informal participant feedback
- Always close the feedback loop
- Working with interested participants, develop opportunities for them to be involved in project evaluation
- Involve participants in staff recruitment and staff appraisal processes
- Connect participants into service user involvement opportunities in the partnership organisations

- Ensure participant voice directly informs funding organisations' intelligence and decision making around designing future funding models and schemes

Outcomes recommendations

Terminology

The evaluators recommend that for future delivery, there is dialogue with funders regarding the terminology used for the project, including:

- Outputs should refer to as services delivered or activities
- Demographic data should be referred to as demographics
- Any positive changes the project hopes to deliver should be referred to as outcomes
- If need-be, outcomes are divided into primary and secondary outcomes

Outcomes

The evaluators recommend that for any future delivery:

- That a theory of change is developed to inform the construction of outcomes and outcome indicators

- That only singular outcomes should be used rather than outcomes with multiple elements, alongside indicators that can be achieved on the road to that outcome.

- That outcomes can be recorded throughout the participants journey, recognising the smaller steps that are also significant to the participants journey, as well as recording them as participants exit the project.

- That job search should be an outcome, not just for participants who are exiting.

- Further exploration is needed around utilising qualitative methods of evidencing less tangible outcomes, e.g., resilience, improved well-being, increased self-confidence.

- That work placements, voluntary work and internships are all considered outcomes under the banner of unpaid work opportunities.

The evaluators recommend that for any future delivery:

- That the Employment Broker role be carefully considered as this was seen as crucial to securing successful employment opportunities.

- Where targets are set to increase participants in certain demographic groups ("outputs"), that a Diversity, Equity, and Inclusion strategy is created and implemented.

- That the Participants' Costs Fund is a major factor in helping participants overcome their barriers, however, it should be easier and quicker to access without any unnecessary delays and duplicated paperwork.

- That an effective process is established to capture feedback from participants who disengage, and that formal and informal methods of capturing feedback are made explicit to participants alongside the Complaints Policy.

8. MESSAGES FROM THE ROUTES PARTNERSHIP ORGANISATIONS

Significant added social and economic value

The Routes project made huge positive changes to the lives of individuals it supported over the six years. However, it doesn't stop there, the projects impact goes beyond individuals as it also had a positive impact on the local communities it served. One senior manager referred to the "*significant contribution*" the project made to the *"local economies of Brighton and Hove and West Sussex."*

This partnership "*secured £1.2m in funding over the life-course of the project*", which funded employment for local professionals, offered practical, emotional, and financial support to hundreds of local people, helping those that needed it most to get into employment, to access education and training, or by becoming more work ready for the future.

The funding also strengthened Community Works as the lead partner, and in their role supporting other especially smaller organisations in the area. The impact of this on those organisations cannot be understated:

> *"We have learned a huge amount about where and how we can support partnership working and what it takes to create a successful lead partner relationship. Being the lead partner in a delivery focused programme when you do not hold direct delivery responsibility can be challenging and has strengths and weaknesses as a model. Being able to focus on the complex funding stream, complex reporting and monitoring required by funders allowed us clarity but understanding and supporting impact from a delivery point of view felt further removed. Supporting delivery partners with different delivery models and approaches led to a more tailored lead partner model which required dedicated resource as the project evolved."*

The team have been well networked in the sector, built strong relationships with partners, and have consequently been recognised for their *"contribution to the local skills and employability agenda."* There was strong sentiment from referral agencies that by Routes ending a significant void will be left for those in need of the tailored support Routes offered, *"without the service a big hole will exist in future."*

There was also recognition that changes are needed in the way that 'into employment' or 'back to work' type programmes are commissioned, to avoid financial wastage and duplication of resources, and improve system effectiveness and outcomes:

> *"It is a shame that all the agencies involved in employment support could not "tweak' their support so we could collectively support each client's needs in a co-ordinated, stream-lined way and avoid duplication. This is not the fault of Routes, but the lack of vision from key funding partners who grant funding to projects in isolation from the big picture."*

All partners expressed a strong desire that the learning and development from this project continue to have a positive impact on of their organisations and their communities.

By way of legacy, delivery partners have *"developed their knowledge and understanding of their communities … as well as developing their services to better meet the needs of local people"*; and intend to utilise the links they have made through the partnership for the benefit of local people in a sustainable way:

> *"[We are] embedded into new communities, communities with a paucity of services… we do have strong links with JCP and community groups and will continue to serve the*

communities in which we are embedded with courses to aid progression, and mental health… The relationships built with JCP amongst others will hopefully survive the project end." (Senior manager)

Furthermore, delivering Routes has helped shape organisational strategy:

"The Routes vision will survive beyond the life of the project as it has helped [us] to consider how we will take this approach as we create new opportunities for clients to participate in similar employment and training programmes... we are actively exploring the possibility of creating an employment programme to provide more opportunities for people with lived experience of trauma, problematic substance use, mental ill health, and homelessness to gain paid work [in our organisation]. This project has inspired that vision." (Senior manager).

Feedback to European Social Fund and the National Lottery Community Fund

The complexity of this funding stream lay in the administrative, compliance and reporting processes, which were described as "*rigid", "impenetrable", "disproportionate", "frustrating" "unnecessarily time consuming"* and at times *"pedantic"* and at worst *"incomprehensible."*

This reduced the resources needed to deliver the project, which put unnecessary pressure on delivery staff and consequently adversely affected retention of participant facing staff. The partners invested more resources in managing the project, and though necessary, left holes elsewhere. All the while their focus was on having to demonstrate value for money and results.

One senior manager stated that *"the compliance administration and paperwork required for ESF projects cannot be underestimated."*

Community Works reported that:

"Gaining an understanding of and implementing the complexities of ESF funding to allow the partners the flexibility to develop a responsive service was challenging whilst ensuring compliance with the funding requirements. The investment in audit work against the need to increase capacity for partners was also a challenging concept."

The delivery partners did not have opportunities to negotiate with, and influence BBO processes and requirements. This was the role of the lead partner who were to some extent able to do so, but within the very tight requirements:

"The balance was understanding where the negotiation points were (targets, delivery mechanisms), and checking every opportunity for flexibility in the requirements."

"Our relationship with BBO was good and based on our desire to support those with less opportunity to engage, our assurance approach and our partners ability to provide the required evidence, incredible individual outcomes and supported by strong performance against targets superb achievements, even through a pandemic."

One senior manager said, *"This partnership successfully navigated those challenges, to achieve successful approaches in their communities and within their own organisations."*

The challenges aside, one of the underlying principles of this funding was that it enabled smaller organisations access to ESF funding that might not normally be accessible. It offered the opportunity to better understand complex funding streams whilst delivering to local people.

This has been a capacity building exercise for the partners who are now more experienced with larger funding pots and are better placed to deliver similar work or similar funding in future:

> *"Sustaining the learning and expertise to continue to deliver the next iteration of this work should be a priority for The National Lottery Community Fund."*

The partnership organisations were extremely grateful for the funding opportunity to provide the Routes service to their beneficiaries and communities.

> *"The funding facilitated an inspiring project that has created real opportunities for people to achieve their goals in a very person-centred way, removing obstacles in a way no other available revenue stream can…. therefore changing the lives of many local people, for the better."*

The partners have a sense of pride that participants have been able to achieve what they have, and in their staff for delivering such an amazing and inspirational project.

With thanks and gratitude to the funders and to all who those that helped make it happen.

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