

## **EMPLOYMENT AND SKILLS PANEL**

**MEETING TO BE HELD AT 2.00 PM ON THURSDAY, 12 SEPTEMBER  
2019 IN COMMITTEE ROOM A, WELLINGTON HOUSE, 40-50  
WELLINGTON STREET, LEEDS**

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- 1. APOLOGIES FOR ABSENCE**
- 2. DECLARATIONS OF DISCLOSABLE PECUNIARY INTERESTS**
- 3. EXEMPT INFORMATION - EXCLUSION OF THE PRESS AND PUBLIC**
- 4. MINUTES OF THE MEETING OF THE EMPLOYMENT AND SKILLS PANEL HELD ON 30 MAY 2019**  
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- 5. CHAIR'S UPDATE**
- 6. GOVERNANCE ARRANGEMENTS - TERMS OF REFERENCE, QUORUM AND MEMBERSHIP**  
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## **10. DATE OF THE NEXT MEETING - 27 NOVEMBER 2019**

**Signed:**

A handwritten signature in black ink, appearing to be 'BGM', with a horizontal line underneath.

**Managing Director  
West Yorkshire Combined Authority**

**MINUTES OF THE MEETING OF THE  
EMPLOYMENT AND SKILLS PANEL  
HELD ON THURSDAY, 30 MAY 2019 AT COMMITTEE ROOM A,  
WELLINGTON HOUSE, 40-50 WELLINGTON STREET, LEEDS**

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**Present:**

Rashik Parmar MBE (Chair)  
Karen Milner  
Mark Roberts  
Glynn Robinson  
Amanda Stainton  
Councillor Susan Hinchcliffe  
Councillor Patrick Mulligan

IBM  
Paths and Progress  
Beer Hawk Ltd  
BJSS  
Portakabin  
Bradford Council  
North Yorkshire County Council

**In attendance:**

Nav Chohan  
Diane Towler  
Tim Thornton  
Alan Reiss  
Ian Smyth  
Michelle Burton  
Peter Glover  
Megan Hemingway

Leeds City Region Skills Network  
Department of Work and Pensions  
LCR Skills Network  
West Yorkshire Combined Authority  
West Yorkshire Combined Authority  
West Yorkshire Combined Authority  
West Yorkshire Combined Authority  
West Yorkshire Combined Authority

**42. Apologies for absence**

Apologies for absence were received from Councillor Darren Byford, Councillor Imran Khan, Councillor Naheed Mather, Councillor Carol Runciman, Nick Bowen, Peter Duffy and Margaret House.

**43. Declarations of disclosable pecuniary interests**

There were no pecuniary interests declared by members at the meeting.

**44. Exempt Information - Exclusion of the press and public**

There were no items on the agenda requiring exclusion of the press and public.

**45. Minutes of the meeting of the Employment and Skills Panel held on 28 February 2019**

**Resolved:** That the minutes of the Employment and Skills Panel held on 28 February 2019 be approved and signed by the Chair.

**46. Chair's update**

The Chair provided an update on changes in membership and the progress of a number of key topics.

Membership

The Chair advised a number of private sector members were coming to the end of their term of office, namely Peter Duffy, Tom Keeney, Karen Milner and Beverley Parrish. The Chair thanked those members for their contributions to the Panel.

It was noted that a new private sector member, Martin Booth, would be joining the Panel once appointments had been confirmed at the Combined Authority's annual meeting on the 27 June

Policy and Protocols

The Chair drew to the attention of members the new Conflicts of Interest Policy and Protocol and asked that they read and adhere to this.

Future Ready Skills Commission

The Chair confirmed that a meeting had taken place on 15 May 2019, which Nav Chohan, had attended. It was noted that progress was being made and the enthusiasm for this was evident at the meeting.

Personas

The Chair was keen to continue developing personas although it was proving difficult to involve practitioners in this work.

ESF Regional Bid

The Chair confirmed that a bid had been submitted in response to an ESIF 'Skills for Growth' of £2.9 million. If successful the activity would commence in January.

**47. Local Industrial Strategy Development**

The Panel was provided with an update on progress to develop a Local Industrial Strategy (LIS) and to seek input on the strengths and opportunities in the new geography.

In early 2018, the LEP Board and the Combined Authority agreed that work would begin on the development of a Local Industrial Strategy (LIS) for Leeds

City Region. Sitting at the heart of a new, long term strategy policy framework, the emerging LIS will focus on bold steps aimed at boosting productivity and driving both inclusive and clean growth living for a post-2030 economy.

Alan Reiss, Director of Policy, Strategy and Communications, clarified that although talks were still ongoing with North Yorkshire in relation to the geography, it had subsequently been decided for the purposes of developing the LIS the current LEP will be working in the context of the Leeds City Region geography alone.

It was confirmed that the call for evidence had been completed and there would now be further external commissions to provide more evidence and to form an expert panel. The development of the strategy was now moving into consultation phase with the districts, who would advise who should attend.

A presentation was given to the Panel as to the Leeds City Region Economic Assessment. Highlights being:

- There is a productivity deficit issue in the region
- There is a link between skills being low and low productivity
- There has been a growth in higher paid workers more recently
- Skills shortages exist in specific areas; professional/ technical /engineers/ digital/ nurses/ construction and building.

The main message was that workforce development is key.

It was noted that in the context of the new single LEP, collaboration was still taking place on overlapping areas but it made sense to provide a focus on the specific regions separately, before then bringing it together to avoid a dilution of key regional issues and focal points.

Members asked what the role of the Employment and Skills Panel was in relation to the Local Industrial Strategy. It was confirmed that the Panel will define what shapes skills and employment, with the Skills Commission work overlapping in its development.

The Panel suggested that as similar issues exist in all Northern cities regarding the skills and productivity link there should be a joined up approach and asked whether existing work already been done by other cities. It was acknowledged that there was a need to attract the right businesses to the region. Members also suggested it would be beneficial to make existing sectors better skilled. For example developing a clearer development career pathway in healthcare to enable a worker to progress from being a carer role to a nurse.

**Resolved:**

- (i) That the contents of the report be noted.
- (ii) That the Panel's comments and suggestions be noted.

- (iii) That the Panel recommended the Combined Authority endorse the proposed way forward.

#### **48. Further and Higher Education Offer to Businesses**

Tim Thornton from Huddersfield University representing the LCR Skills Network attended on behalf of Professor Margaret House to give a presentation on the Further and Higher Education offer to businesses.

Key points were:

- There are three gold rated institutions in the LEP area; Leeds, York and Huddersfield
- The LEP area accounts for roughly 20% of the UK student population
- There are opportunities to work collaboratively
- There is a net inflow of graduates in the region
- Work based learning frameworks are key

The Chair commented that there should be links to industry to enable skills development and that the research agenda needs to align to the Region's ambitions.

Members commented that innovation and skills are also important and are often missed. They felt that innovation requires skilled employees and a strong flow of graduates, and that connections with businesses should be viewed as 'anchors for growth' rather than purely skills development to facilitate economic growth.

It was noted that Universities were setting targets themselves as to annual business interactions and would welcome targets from the Local Industrial Strategy (LIS). The issue of Intellectual Property (IP) rights was of concern as often this was a barrier to sharing information and therefore a barrier to innovation.

The Panel was presented with a report from Nav Chohan, Chair of the LCR Skills Network and Principal of Shipley College, about how Colleges are responding to the current and future skills needs of businesses. The paper offered suggestions for how both Universities and Colleges may work together with the Employment and Skills Panel to address major challenges and opportunities.

Main points highlighted were:

- The delivery agreements with the seven further education colleges in West Yorkshire were key to improving alignment with and responsiveness to economic demand.
- When students see a clear pathway to a job via a course they are likely to sign up.
- The ESIF funded 'Let's Talk Real Skills' project delivered by the

Combined Authority is to define a set of sectors that will be explored in detail. The sector's career routes will be defined in order that pathways to employment can be created with the appropriate companies and individuals.

**Resolved:**

- (i) That the presentation contents and Panel comments be noted.
- (ii) That the contents of the report and Panel comments be noted.

**49. Careers Policy Statement**

The Panel was presented with a report on the draft policy statement on All Age Careers Education, Information, Advice and Guidance.

At the September 2018 meeting of the Employment and Skills Panel it was agreed that the refreshed Employment and Skills Plan will consist of thematic policy statements, each of which will be separately developed and approved by the Panel. The statements will ultimately be presented via an online resource (currently under development) that will incorporate the LEP's entire policy framework, providing a more agile and flexible system which will be easier to update and will be accessible to the public. Two policy statements have been approved by the Panel to date, relating to higher level skills and apprenticeships.

The Panel was asked to comment on and approve the draft policy statement on careers.

The Panel welcomed the draft overall but asked for a number of amendments to be made, and for the policy statement to then be re-circulated for approval.

The Panel also included:

- Consideration to be given to whether the policy statement was sufficiently ambitious.
- Emphasis to be placed on the role of employers.
- A clearer offer to employers on how to engage with education.

**Resolved:**

- (i) That the contents of the report be noted.
- (ii) That the draft policy statement on careers be amended and re-circulated to the Panel for endorsement.

**50. Employment and Skills Programmes**

The Panel was provided with a report on the progress of the delivery of Leeds City Region Enterprise Partnership - led employment and skills programmes in the Leeds City Region and was asked to note and comment on the report.

### Enterprise in Education

The Panel noted that there were currently 13 staff working in the Enterprise Advisor Network with businesses and schools.

The campaign 'Give an Hour' was targeting businesses who had never been involved before.

### Leeds City Region Employment Hub

Members were provided with contact details for local Employment Hubs.

### Apprenticeship Grant for Employers

The revised grant (revised following feedback from the Panel) was re-launched on 13 February 2019. It was reported that demand had still continued to be low and the grant would remain under review due to the low take-up.

### Skills Capital

The Panel was asked to note that no further funding was available and lobbying continued for more investment.

### Social Prescribing Pilot

Members were informed that an evaluation of the completed Work Wellness Service project in York was underway and initial indications are that it appears to have been a success.

The Halifax Work Wellness project had now been established and to date was looking positive.

The Panel queried whether the project should be evaluated with all other social prescribing pilots taking place, as the issue of doctors dealing with non-medical issues was widespread. Michelle Burton agreed to action this.

### Sector Skills

It was noted that the reboot programme which was part-funded by the European Social Fund (ESIF) was now progressing after initial delays, with contracts being signed. The programme was intended to stimulate up-skilling of, and new careers for, adults. Specifically to retrain in skills shortage areas.

### Delivery Arrangements

The Panel was informed that Cllr Hinchcliffe had invited Principles and representatives from the seven FE institutions to a roundtable discussion in June to agree next steps and future working based on the outcomes of reviewing their Delivery Agreements.



Members were keen to ensure that colleagues responded to the skills needs in the creative section.

**Resolved:**

- (i) That the contents of the report be noted.
- (ii) That Michelle Burton explore the possibility of evaluating the Work Wellness projects against other social prescribing projects.

**51. Date of Next Meeting**

Thursday 12 September 2019 at 2pm in Committee Room A, Wellington House Leeds.

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**Report to:** Employment and Skills Panel

**Date:** 30 July 2019

**Subject:** **Governance arrangements**

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**Director(s):** Angela Taylor, Director of Corporate Services

**Author(s):** Liz Davenport

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## 1. Purpose of this report

- 1.1 To note the governance arrangements for the Employment and Skills Panel

## 2. Information

- 2.1 At the Annual Meeting on 27 June 2019, the Combined Authority resolved to appoint the Employment and Skills Panel as an advisory committee of the Combined Authority which reports to the LEP Board, on the **terms of reference** attached as **Appendix 1** to this report.
- 2.2 The terms of reference were revised from the last municipal year to include a reference to clean growth, to reflect the revised corporate priority.
- 2.3 At its meeting on the 28<sup>th</sup> February, the Panel agreed to take on the functions of a Skills Advisory Panel (SAP). The guidance set out by the Department for Education specifies that there must be representation from the voluntary and community sector on SAPs. Given the intention to work towards a single LEP Board covering West Yorkshire, North Yorkshire and York, it is proposed that the voluntary and community sector representative on the Employment and Skills Board for York, North Yorkshire and East Riding should be co-opted onto the Employment and Skills Panel.
- 2.4 Membership arrangements remain as for last municipal year. No changes have been made to the **quorum** of the Panel, which remains 4 voting members (to include 1 member of the Combined Authority or other local authority member and **voting** arrangements are also unchanged.
- 2.5 The Combined Authority at its annual meeting also appointed Rashik Parmar as Chair of the Panel.

2.6 The Combined Authority also agreed dates for meetings of the Panel, as follows:

- 12 September 2019
- 27 November 2019
- 25 February 2020
- 19 May 2020

### **3. Financial Implications**

3.1 There are no financial implications directly arising from this report.

### **4. Legal Implications**

4.1 There are no legal implications directly arising from this report.

### **5. Staffing Implications**

5.1 There are no staffing implications directly arising from this report.

### **6. External Consultees**

6.1 No external consultations have been undertaken.

### **7. Recommendations**

7.1 That the Place Panel notes the governance arrangements for the Panel approved by the Combined Authority at the Annual Meeting on 27 June 2019.

### **8. Background Documents**

None.

### **9. Appendices**

Appendix 1 – Terms of Reference for the Employment and Skills Panel



## Terms of Reference

### Employment and Skills Panel<sup>1</sup>

The Employment and Skills Panel is authorised to advise the Combined Authority and the Leeds City Region Enterprise Partnership in support of their ambition to secure inclusive and clean growth in relation to:

- a) approving, reviewing or varying any policy or investment priorities, strategy or plan;
- b) identifying and promoting opportunities for obtaining devolved funding and bidding for other funding;
- c) developing and delivering new services;
- d) monitoring and reviewing the delivery of agreed outcomes and impact of any strategy, plan or service;
- e) developing and promoting a shared understanding of the demand for skills and employment with key partners;
- f) influencing the provision of education and training;
- g) promoting coherence with education strategies and policies, and
- h) aligning strategic priorities, strategies and plans,<sup>2</sup>

in respect of any function of the Combined Authority relating to **employment and skills** within the Leeds City Region<sup>3</sup>.

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<sup>1</sup> The Employment and Skills Panel is an advisory committee of the Combined Authority, appointed under S102(4) Local Government Act 1972.

<sup>2</sup> through liaison with other committees or sub-committees and partner councils.

<sup>3</sup> The Employment and Skills Panel is the Skills Advisory Panel for the Leeds City Region Enterprise Partnership

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**Report to:** Employment and Skills Panel

**Date:** 12 September 2019

**Subject:** **Employment and Skills Programmes**

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**Director(s):** Henry Rigg, Interim Executive Head of Economic Services

**Author(s):** Michelle Burton, Catherine Lunn, Jane Green, Michelle Hunter, Alex Waugh

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## **1 Purpose of this report**

- 1.1 The purpose of this report is to update the Panel on the progress of delivery of LEP-led employment and skills programmes in the Leeds City Region.

## **2 Information**

### Delivery Agreements

- 2.1 The first formal reviews of **Delivery Agreements** with the seven West Yorkshire Colleges took place in autumn/winter 2018. A report was published on 6 June highlighting the outcomes of the reviews and current position statement for each college <https://www.westyorks-ca.gov.uk/media/2350/delivery-agreements-2019.pdf>.
- 2.2 Following the publication of this report, Cllr Hinchcliffe hosted a roundtable discussion with the colleges to look at next steps and actions. Key discussion points from the meeting were as follows:
- Apprenticeship funding allocation for delivery to non-levy companies has not been increased to reflect demand and colleges (and other providers) will not be able to realise any apprenticeship growth this year. Some colleges are starting apprentices at risk despite having been notified by the ESFA that there is no prospect of growth funding (see also 2.15 onwards)
  - Funding for further education has decreased year on year/not kept up with inflation. There is a national campaign to raise awareness of this issue
  - Colleges are struggling to attract and retain specialist tutors in priority sector areas
  - Although there was a good level of understanding of the FutureGoals careers campaign for young people, there was an opportunity for the LEP to engage

more with colleges to ensure that adults are supported to understand the careers opportunities in Leeds City Region

- Colleges would be supportive of a collaborative approach to engaging businesses, particularly around promotion of the Industrial Placements required for the new T Level qualifications.

2.3 An action plan has been put in place to address some of the issues.

2.4 The next round for formal reviews will take place late 2019 following release of the ESFA data cube.

#### School Partnerships

2.5 The **Enterprise Adviser Network** and the Combined Authority's Enterprise Coordinators are currently engaged with 182 (90%) of secondary schools and colleges. From April 2019 to June 2019 the network has delivered over 30,975 employer encounters and 3,795 employer encounters for pupil premium learners, 2,860 of whom have had at least two employer encounters as part of the network.

2.6 A call for applications to the **Raising Aspirations pilot** closed on the 21<sup>st</sup> June 2019 with 36 applications received from 34 schools and 2 colleges. 16 projects were awarded through the pilot pending the return of grant offer letters from the successful applicants. The awarded projects will benefit a combined total of over 6500 disadvantaged pupils within the city region. All projects aim to raise the aspirations of the pupils through a variety of innovative methods with employers encounters embedded throughout. Successful projects have been awarded in the following areas:

Bradford: 2

Calderdale: 4

Kirklees: 4

Leeds: 5

Wakefield: 1

York: 1

2.7 The **Kirklees Careers Hub** is making good progress in supporting its 35 member schools and colleges to work towards the Gatsby benchmarks for good careers guidance. The average number of benchmarks achieved by the 35 hub institutions is 3.5, against a national careers hub average of 3.2 and a national average of non-hub schools of 2.5.

2.8 The Careers Hub piloted a Key Stage 3 parental engagement event in North Kirklees, in an area where parental engagement is particularly low. This event was aimed as an introduction to careers opportunities and pathways to support future decision making and was unusual as careers events usually target the parents of older children. Over 100 people attended with 88% of parents reporting that they had more information about their child's careers and education options as a result of the event. The remaining 12% of parents already rated their knowledge at the strongest level before the event.



- 2.9 As previously reported, the Combined Authority was successful in its application to the Careers and Enterprise Company for a **Special Educational Needs and Disability (SEND) Careers Hub**. This is a pan-regional Hub covering schools in Leeds, Wakefield, Calderdale and York which is due to commence delivery in September 2019.

### Careers

- 2.10 During May and June the **FutureGoals** careers campaign [futuregoals.co.uk](https://futuregoals.co.uk) reached over 12,000 young people, educators and parents/carers through social media and direct marketing. 80 teachers benefitted from employer-led CPD activities. From September, a marketing campaign will commence, targeting young people and their influencers, adults, those seeking apprenticeship opportunities and those looking for inspiration to change their career.
- 2.11 From October 2019 the **FutureGoals** careers campaign and website will become an all-age careers inspiration platform enabling individuals from across the Leeds City Region to access high quality Labour Market Information. The all-age platform will feature new and updated content including educator curriculum resources to help teachers meet Gatsby Benchmarks for good careers guidance and information to inspire adults to make better, more informed careers choices.
- 2.12 To support the roll out of the **Creative Industries Toolkit** sponsored by the Burberry Foundation, the LEP will partner a 'Creative Zone' at Skills Yorkshire in October. Skills Yorkshire is the region's largest skills show with up to 5,000 young people, parents and teachers attending each year. The Creative Zone will enable businesses from the region to exhibit at the interactive show to inspire the next generation of talent and educate them about careers in the creative industries sector.
- 2.13 The **[re]boot** programme, part-funded through European Social Funds (ESF), will commence delivery in September, with the West Yorkshire Consortium of Colleges now procured as a subcontractor alongside Leeds Trinity University as delivery partner. Provision will be focused on the following sectors; Digital and Creative, Engineering and Manufacturing, and Construction and Infrastructure. [re]boot will offer individuals over the age of 18 the chance to upskill, gain new skills/qualifications and enter employment within shortage sectors. The programme will particularly target potential career changers and unemployed and under-employed graduates in the region.
- 2.14 The first courses to commence will focus on Digital and Production Skills. Businesses from across the region have the opportunity to engage with the West Yorkshire Consortium of Colleges and Leeds Trinity University to co-develop and influence course content to ensure that training addresses skills gaps and meets business needs.

## Apprenticeships and Employment

- 2.15 The LEP/Combined Authority has been contacted by a number of providers who have reported that they are turning away non-levy paying businesses and potential learners because of a **lack of non-levy funding for apprenticeships**. This issue was raised at the LEP Board July meeting and Ben Still, Managing Director of the Combined Authority was charged with finding solutions for the immediate and possible longer term impact as this issue could have a negative impact on our economic and productivity priorities and ambitions.
- 2.16 A survey of providers has been carried out to gather more information. The majority of respondents have confirmed that they are also in this situation. However, a minority of respondents indicated that they still have around 20% of their apprenticeship allocation available. In order to understand this issue more fully, officers will continue to engage with providers and intermediary organisations (including AELP – the umbrella organisation for independent training providers – and the Association of Colleges) to investigate further.
- 2.17 Further to the discussion at the LEP Board, the following approach is underway:
- Focus on supporting levy transfer. Levy-paying employers can transfer up to 25% of their levy to support apprenticeships in smaller businesses. There is opportunity to do more to encourage this approach by:
    - Targeting levy-paying employers: ideally HMRC would provide the information that they hold about which levy payers have unspent funds. Alternatively, large companies could be approached directly, prioritising those that the LEP/CA is already engaging with/supporting. Levy transfer could also be built in to Inclusive Growth grant conditions;
    - On a pilot basis, provide a brokerage service between levy-paying employers and training providers for the purposes of levy transfer. The AGE scheme would continue to run alongside to provide an incentive for SME take-up of apprentices.
    - Evaluate and roll out this approach further if it proves successful.
  - Lobby government to address the funding gap, commencing by making contact with appropriate policy teams. The Future-Ready Skills Commission provides an opportunity to lobby on this agenda.
- 2.18 At the May meeting of the Employment and Skills Panel, the Panel was alerted to the low level of uptake for **Apprenticeships Grant for Employers (AGE)** since its re-launch in February 2019. The criteria for the revised AGE grant extended the offer to businesses with up to 249 employees across all sectors. The maximum grant amount was increased to £2,500 from £2,000 as recommended by the Employment and Skills Panel in November 2018.
- 2.19 However, since February, only seven applications have been received (12 in total since August 2018). The national funding issue summarised above is

likely to be a contributing factor – as AGE is a top-up to this mainstream funding.

- 2.20 A broad range of marketing activity has taken place to promote the AGE grant, making use of a wide range of channels to reach SMEs, including those who are unlikely to have engaged with the LEP previously. The marketing approach for AGE has been the most intensive of all LEP products and has included:
- Press releases/articles utilising various local newspapers, business websites and
  - business related newsletters
  - Attendance by AGE team at a variety of business facing events
  - Briefing of LEP and stakeholder business engagement staff
  - Big screen adverts in Leeds and Bradford
  - Three geographical and sectoral targeted LinkedIn advertising which has facilitated
    - 1,236 engagements
    - 95,188 impressions
    - 770 clicks
    - 165 likes
    - 69 leads
- 2.21 The main recruitment/start time for Apprentices is September/October. It is therefore possible that there is a pipeline of grant applicants waiting for their first apprentice to start before submitting a grant application, and we need to accommodate this in planning for utilisation of the funds. The current plan is for the application process to be turned off at the end of November, which provides adequate time to process the grant claims in the current financial year.
- 2.22 The **LCR Employment Hub** programme, launched in January 2019, is being delivered in partnership with Local Authorities and will support over 6,000 young people aged 15-24 to access apprenticeships and employment. Following a 9 month delay in contracting with the Managing Agent, a number of the local Hubs have experienced difficulties recruiting suitably experienced/qualified staff. It is anticipated that the programme could be impacted by the funding issues facing providers (see 2.15 above) regarding engagement of non-levy companies, particularly the aspiration to engage businesses who have never offered apprenticeships before.
- 2.23 Across the programme, performance is significantly behind profile, with only 33% of profiled participants supported so far. Performance review meetings took place in July, with plans being put in place at a local level to mitigate against underperformance.
- 2.24 **National Apprenticeships Week 2020** (NAW20) will take place from 3 to 7 February.

- 2.25 An action plan for the promotion of **apprenticeships in schools** is being developed for the new academic year. Performance against the plan will be reported to the ESP during 2019/20.

#### Social Prescribing Pilot

- 2.26 An evaluation of the **Work Wellness Service** project in York has now been completed and is attached at Appendix 1.
- 2.27 The **Halifax Work Wellness** project has been established at Beechwood Medical Centre in a deprived area of Halifax, with delivery commencing in January 2019. Since the project's commencement in January 2019, 340 people have been supported, with 33 supported to return to work. Over the last quarter, there has been an increase in clients coming into the service at crisis point and requiring urgent mental health assessment. A significant number of clients are seeing the Work Wellness Adviser, and gaining access to a wide range of services, resulting in a reduction in GP and medical appointments.

#### Skills for Business

- 2.28 An “**agile squad**” of SME businesses and intermediaries were invited to review the LEP/CA's skills offer and messages to businesses. Key points from the discussion were:
- The skills offer to businesses was good and offered wide ranging support to businesses (see summary at appendix 2).
  - There are a number of channels to communicate with businesses that could be better accessed to raise awareness of offers including Chambers of Commerce, Make, Connect Gazelles
  - Avoiding jargon was encouraged to ensure a clear offer to businesses in written content, use case studies in social media to demonstrate local activity
  - There is a concern regarding how to grow the apprenticeship offer in the region. Some levy paying businesses are not clear on how to use their levy/unused levy and have inconsistent advice from providers; non-levy paying businesses are in some cases being turned away from providers due to a lack of funding
  - Businesses want one place to find out what support they can receive
- 2.29 As previously reported, the Combined Authority has submitted a bid for funding through a recent **ESF Skills for Growth** call which, if successful, will support businesses to engage with the full breadth of the education and training landscape. A decision is expected in autumn 2019. The proposed programme is currently progressing through the Combined Authority's assurance process.

### **3 Financial Implications**

- 3.1 There are no financial implications directly arising from this report.

## **4 Legal Implications**

- 4.1 There are no legal implications directly arising from this report.

## **5 Staffing Implications**

- 5.1 There are no staffing implications directly arising from this report.

## **6 External Consultees**

- 6.1 No external consultations have been undertaken.

## **7 Recommendations**

- 7.1 The Panel is asked to note and comment on the progress of delivery of employment and skills programmes in the Leeds City Region.
- 7.2 The Panel is asked to reflect on the impact and lessons from the Work Wellness pilot and refer to the LEP/Combined Authority's Inclusive Growth and Public Policy Panel to influence health commissioners

## **8 Background Documents**

None.

## **9 Appendices**

Appendix 1 – Work Wellness evaluation  
Appendix 2 – summary of Leeds City Region skills offer

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# **Evaluation of the Work Wellness Project**

**For West Yorkshire Combined Authority**

**July 2019**

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Project number:	HEALT04-8342
Title:	Evaluation of the Work Wellness Project
Location:	S:\ProjectFiles\W\West_Yorkshire_Combined_Authority\HEA LT04-8342_Work_Wellness\Reports\Report_V1.doc
Date:	May 2019
Report status:	2nd Draft
Approved by:	Michael Fountain
Authors:	Becky Gulc & Kay Silversides
Comments:	To: <a href="mailto:Becky.Gulc@garesearch.co.uk">Becky.Gulc@garesearch.co.uk</a> & <a href="mailto:Kay.Silversides@garesearch.co.uk">Kay.Silversides@garesearch.co.uk</a>
This research has been carried out in compliance with the International standard ISO 20252, (the International Standard for Market and Social research), The Market Research Society's Code of Conduct and UK Data Protection law	



## Acknowledgements

Qa Research would like to thank those who contributed to this evaluation, including professional stakeholders (including GPs) and clients of Work Wellness who agreed to be interviewed. We would also like to thank Gráinne Hillery (Work Wellness Adviser) for her time and support in putting together this evaluation report.

## Foreword

**Cllr Susan Hinchcliffe, Chair of the West Yorkshire Combined Authority and Leader of Bradford Council, comments:**

*“The primary focus of national policy is on addressing health issues, alongside other needs, such as skills deficits, in order to get people into employment. There is a growing recognition that we also need to help people who are already in employment to deal with health conditions to keep them in work and to stay connected to the labour market. People who fall out of the labour market for health reasons often find it difficult to re-connect.*

*In this context, social prescribing is increasingly seen as an effective mechanism for addressing health conditions through referral to non-clinical interventions.*

*Work Wellness was developed as an innovative pilot which uses social prescribing to support people who were off work, or at risk of being off, due to stress, anxiety or depression. We wanted to test the effectiveness of referral to holistic, one-to-one advice, coaching and action planning as a means of tackling the full range of issues that prevented patients from returning to work.*

*This evaluation of the pilot provides an important insight into the effectiveness and value for money of this approach, the scale and nature of the benefits and the practical lessons learnt from delivery.*

*The findings will provide a strong basis for informing decisions about rolling out similar projects more widely. In this respect it is relevant not just to the Leeds City Region but to policy-makers and practitioners across the country.”*

## 1. Executive Summary

In February 2019 West Yorkshire Combined Authority commissioned Qa Research to conduct an independent evaluation of the Work Wellness project in York.

Work Wellness was an exploratory social prescribing project focussing on people aged 50+ who were signed off sick from work. The project was concerned with testing the theory that a non-clinical intervention could have a positive impact on ensuring those aged 50+ with mental health conditions can remain in work long-term, for the benefit of the individual and the wider economy. The project was set in the context of an increasing trend for those over 50 who are absent from work due to ill-health to fall out of the labour market altogether.

The project was awarded £27,350 and following a two-month period of networking project delivery took place between February 2018 and February 2019 by a Work Wellness Adviser (WWA). The adviser was based at and line-managed within the York Learning team at City of York Council whilst the overall project was managed by an independent consultant contracted to West Yorkshire Combined Authority. The project had a modest target to work with 10 people in the target demographic (50+ and in-work) to enable them to remain in work or return to the workplace if they were currently within a period of sickness absence.

Qa Research examined a range of secondary data as part of this evaluation provided by the WWA including monitoring, outcome and impact data for clients and employers. This also included a Social Value Engine which Qa has independently appraised with the support of a partner. Qa also conducted some independent primary research with a range of stakeholders as part of the evaluation.

The key findings from the evaluation are:

- Work Wellness demonstrated an effective model for supporting employed people who are experiencing low level mental health issues to remain in employment and/or negotiate adjustments or other arrangements with their employers - 70% of those supported were still employed at the end of the project.
- There was a clear demand for the service with the original target of 10 being exceeded sevenfold.
- Locating the WWA within GP surgeries was very effective in maximising uptake of the service with only 5 'no-shows' out of c.70 referrals.
- Clients reported a range of positive outcomes, and seemed to particularly value the length of time that the WWA could offer, the impartial non-judgmental perspective, and the support with confidence-building.
- Feedback from GPs was overwhelmingly positive with GPs indicating a reduction in time spent on repeat visits from Work Wellness clients.
- The project did not set out to specifically raise awareness or educate employers on the topic of mental health, however there was an increasing demand for the WWA to speak at events and share their learning/case studies during the latter stages of the project, (including from organisations such as Mind and a large national retailer). This work to influence employer behaviour is an example of 'added value' where Work Wellness extended its activity beyond the original remit of the project.
- Evidence from the social value assessment is promising in terms of delivering cost savings to the NHS and DWP and most importantly in keeping people aged 50+ in positive employment and financially secure. The assessment produced a Net Social Value of £9.10/£1.

- The project was fairly unique in its focus, and feedback from clients and GPs suggests that its absence will leave a gap in support.
- Key issues to consider for future similar projects including incorporating more support/supervision for the adviser, how to manage demand, building evaluation into the project design, and collecting more primary research evidence to support any social value assessment.

## **2. Introduction**

In February 2019 West Yorkshire Combined Authority commissioned Qa Research to conduct an independent evaluation of the Work Wellness project. Work Wellness is a small-scale pilot project running in two locations, York and Calderdale. The project ran in York between February 2018 and February 2019. The project began in Halifax in February 2019 and will run until February 2020.

Work Wellness is a social prescribing project focussing on people aged 50+ who were signed off sick from work. The project was concerned with testing the theory that a non-clinical intervention could have a positive impact on ensuring those aged 50+ with mental health conditions can remain in work long-term which is beneficial both to the individual but also the wider economy. This project is set in the context of an increasing trend for those over 50 who are absent from work due to ill-health to fall out of the labour market altogether.

This evaluation report is based purely on the York project. Project management for the York project was provided by an independent consultant contracted to West Yorkshire Combined Authority and on the ground support was provided by line management within the local authority structure in the individual locations. The project had a single Work Wellness Adviser (WWA) who was employed for four days a week to work with clients one to one using a holistic coaching based approach.

Qa have been supported by Ann Hindley in this evaluation. Ann, of Cross Key Associates completed an independent assessment of the Social Value Engine produced by the Work Wellness team.

## **3. Aims and objectives**

West Yorkshire Combined Authority required an independent evaluation of the Work Wellness project in York. The objectives were to make use of existing monitoring and evaluation data; independently assess the robustness of the Social Value Engine produced as part of the project and to conduct some small-scale independent primary research with project stakeholders.

## **4. Methodology**

The evaluation has comprised of the following data collection and analysis methods:

1. Analysis of existing monitoring and evaluation data collected by the Work Wellness Adviser, namely:
  - Background information/press releases;
  - Project statistics – numbers involved; age; gender; industry; job role; duration of support; outcomes;
  - Client feedback (survey monkey response data; client email responses);

- Client case studies;
  - GP survey data; ad hoc GP feedback through email;
  - Journey of support for one Employer and their feedback.
2. An independent review of the Social Value Engine produced as part of the project (reviewed by Ann Hindley).
  3. In-depth face to face and telephone interviews with ten stakeholders between February and April 2019, specifically:
    - The Work Wellness Adviser (WWA);
    - The Project Manager;
    - Line manager of the WWA;
    - 2 clients
    - 2 GPs;
    - 1 reception leader;
    - 2 individuals working for a local social enterprise/local community project.

It is important to note that there were some limitations in gathering primary evaluation data given that the project had already ended when the evaluation began. In particular, it was only possible to interview two clients due to the confidentiality agreements in place. Furthermore, the project did not collect any baseline measures from clients which limits the extent to which impact can be measured.

## **5. Key findings**

### **5.1 How did the project work?**

The project received £27,350 from West Yorkshire Combined Authority to cover a 14 month period; 2 months set up and 12 months delivery. The project operated as a partnership between York Learning, City of York Council, York Medical Group and Priory Medical Group.

The project ran within two GP surgeries in York and was marketed to patients as The Work Wellness Service. The two surgeries were located within adjoining Holgate and Guildhall wards. Both wards have higher numbers of working age benefit claimants than the York average and have seen an increase in total ESA claims since 2014/15.

The service was delivered by a Work Wellness Adviser who received referrals directly from GPs or self-referrals via the GP practices. The post of Work Wellness Adviser was integrated into the practices, including room space and access to patient records (for one of the practices only). Work Wellness also received referrals from Local Area Co-ordinators and Ways to Wellbeing and established connections with local mental health, social prescribing, and community groups and services

The WWA used a holistic, adviser/coaching based approach, to support people who were off work, or at risk of being off, with stress, anxiety or depression (not acute mental health issues). This work took place within 60 minute, 1-1 appointments which aimed to identify and address the problems that the client presented with, e.g. is the issue primarily work based? Are there other factors? Are there any other health issues, family issues or financial issues? An analysis of the work place was done, including specific job details, so that any inherent problems could be addressed. Confidence and self-esteem were key issues explored and the project offered the flexibility to offer in-depth work, over several months, as well as one-off appointments.

With the support of the adviser, the client developed an action plan for returning to their job, or to another opportunity, with ongoing support through the transitional phase, if required. Clients were given access to a broad range of information and resources relating to their situation, including referring and signposting to other services and community groups.

Along with the provision of holistic support, the adviser also offered to set up discussions between clients and employers or represent clients at work meetings where appropriate to support plans for reasonable adjustments needed for a return to work. The WWA also delivered work based advice and support to a small number of employers.

## **5.2 What did the project hope to achieve?**

The project aimed to support a minimum of 10 people in the target demographic (50+ and in-work) and enable them to remain in work or return to the workplace if they were currently within a period of sickness absence. The project also aimed to support individuals, where appropriate, to find suitable alternative employment. Alongside the benefits to the individual, the project hoped to demonstrate time saved and resource savings for GPs. Specific intended benefits included:

For patients

- Improved health and wellbeing
- Supported health and lifestyle change
- Improved self-esteem and confidence
- More specialised local knowledge
- Speed of referral
- Allowing time to be heard.

For GP practices

- Reducing frequent practice attendance
- More appropriate use of GP time
- Easy referral
- Provides links between the VCS and primary care
- Increased range of practical services
- Encouraging and supporting self-care.

Cost saving

- Decreased reliance on GP's
- Decrease in clinical prescribing
- Decreased need for acute services

## **5.3 Monitoring data**

In total the project saw 73 individuals (from a target of 10), mainly through GP referral. Further detail as follows:

- 64 of the 73 were eligible (i.e. employed)
- 45 were employed at project end
- 5 left work (with Work Wellness support, 4 managed to negotiate a redundancy or severance package)

- 14 clients were ‘outcome pending’ at end of project (including long term sick and individuals engaged with in the final few weeks). The project expired before the full impact could be delivered.

## 5.4 What worked well?

### Positive outcomes for clients

The project collected feedback from clients using a short survey (3 open questions) via Survey Monkey. In total, 30 clients responded to this survey and offered overwhelmingly positive feedback. This is explored in more detail below and additional feedback from the two evaluation interviews is also included.

The key benefits identified by clients included the support the project offered with confidence building both in terms of personal self-esteem (encouraging people to see their strengths) and also the confidence to be more open with employers about their mental health. Clients noted that they had been supported to have the confidence to speak to their employers about flexibility and other adjustments to support their mental health. This played a crucial role in their journey to recovery.

*“Work Wellness helped me to rebuild my confidence. Helped me realise I had something to offer and wasn’t alone.” (Client)*

*“Encouraged me to stay in my job and speak to my line manager about issues.” (Client)*

*“Without Work Wellness I probably would have gone back to my GP - the support was vital.” (Client)*

Clients also commented on the useful support provided in terms of understanding HR policies or letters that their employer had written to them and more generally the work focus and support provided to get back to or stay in employment.

*“Having a service specifically focused on work really made the whole process of recovering easier and helped me to work towards the goal of getting back to work.” (Client)*

*“Supporting me with paperwork, helping me understand all the processes, and to know what they should be doing to support me, and what questions to ask.” (Client)*

Clients valued help with decision making and support in unpicking and identify what was causing the issue, e.g. was it work or home or a combination? Client feedback also mentions useful referrals to other support organisations and access to self-help resources along with encouragement to prioritise self-care.

It is clear that the approach of the Work Wellness Adviser was very well received. Clients particularly appreciated the non-judgemental impartial perspective and the holistic approach providing the opportunity to discuss all aspects in detail. The non-directive approach of the adviser was also welcome in encouraging clients to reach their own solutions.

*“Work Wellness has played a major part in my return to work. I was guided each step of the way but never ‘told’ what to do.” (Client)*



*“I was off with work related stress and talking my issues through with someone totally independent really helped me and gave me the strength to challenge the issues I had at work.” (Client)*

### **Benefits for GP practices**

The project issued a short Google survey to the GP practices involved, and 3 out of 4 GPs who responded to survey rated Work Wellness as ‘very effective’ at getting patients back to work and improving mental health. Evidence from the evaluation interviews supports this and indicates that the project played a key part in facilitating recovery and a return to work or to stay in employment.

*“I think the people that have been through the project have probably really valued [WWA’s] support and they probably got better more quickly than they perhaps otherwise might have done and returned to work more quickly and hopefully they’ll feel empowered again to seek help in the future” (GP)*

GPs recognised that the support provided by Work Wellness went above and beyond what they were able to provide within the scope of a GP appointment and offered an accessible and unique type of support for low level mental health issues.

*“certainly the patients of mine had really good care and were really followed up thoroughly for a number of months and [WW adviser] got some of them back to work or helped them to sort a lot of things out like their finances, I think that really helped them improve and get better because it’s not all medication, it’s time and talking to another person giving impartial advice” (GP)*

*“I think that’s probably another reason why patients need more support [lack of continuity of care] because if they just see someone continuously, if they see [WWA] and tell her their story and then see her another two or three times they probably feel listened to rather than telling half a story to four different GP’s all the time” (GP)*

*“it’s just what to do with those people that [WWA] was seeing. Because quite often they’re not unwell enough to go to the mental health team but then they’re not getting any support other than a ten minute GP appointment every now and again and there’s the IAPT talking therapies but if people aren’t willing to talk about their problems..i always think with IAPT people are given six weeks of CBT and they’re not actually given chance to talk about their everyday lives, it’s sort of facilitating people to function really isn’t it” (GP)*

GPs also noticed that, in some cases, they saw less of these patients.

*“They’ve probably saved loads of appointments, they didn’t come back as often it definitely saved some appointments as follow-up” (GP)*

### **Location in GP surgeries**

A key contributing factor to project success is the positioning of the WWA within GP surgeries. The WWA ran appointments at two different surgeries (spanning two different practices). The project benefitted from a prior link some of the staff had with an existing practice which helped secure their involvement once more for this project. Opportune discussions and the ability of GP’s to respond through having a consultation room available for the WWA to use also helped facilitate surgery engagement.

*“I suppose because she’s actually working in the surgery it helps to remind us that that service is there and to refer patients there” (GP)*

*“unless you actually meet that person and hear what they’re doing, there’s a community nurse for this and that so it’s just hard to remember all the different things so I suppose because [WWA] was here I felt it was important to keep the project going, but other people, if you’re working at [another surgery] and you’ve never met [WWA] you’ve just forgotten about the project, it’s how to raise awareness of these things that are going on” (GP)*

Offering appointments with the WWA within the surgeries rather than at council offices (this occasionally happened in the latter stages of delivery) or elsewhere appears to have benefitted the project for several reasons. Firstly, whilst this was a non-clinical intervention it appears that the association with primary care, and certainly the referral from primary care, made it an appointment people would follow-through with, in fact, only 5 of c.70 referrals did not take up the appointment.

*“not only the GP’s but the frontline support staff have been so engaged, without embedding [WWA]’s post within the surgery you’ll never be as successful. The GP surgery gives this project credibility, if your GP says to you ‘would you like to talk to...’ you will take that as a credible offer whereas if you see a leaflet outside you might question what that is all about” (Project stakeholder)*

Secondly it didn’t require patients to go somewhere they were less familiar with. Appointments could also be made there and then (usually via reception staff) which means the project had the best chance of reaching people as soon as they were signed off work sick (or at risk of this) and thus hopefully maximising the chances of supporting the person to remain in work/return.

Towards the end of the project, the adviser noticed that as GPs had become more familiar with the support offered by Work Wellness, they began to make referrals if they felt that a patient was at risk of going off sick due to their mental health. This preventative approach was well-served by the close proximity of the adviser.

*“Sometimes I’d see people towards the end when the GP’s got to understand it better, they’d anticipate someone going off and send them to me and they might not even go off, it might be a job-retention rather than a back to work” (Work Wellness Adviser)*

## **Time**

Both clients and stakeholders noted that the length of time that the adviser could offer to clients was a clear benefit. Often the opportunity to have a detailed conversation about their situation was therapeutic in itself.

*“I think that what they really valued was the time, an hour and a GP is ten minutes” (Work Wellness Adviser)*

*“As a GP you’re just deciding if someone’s depressed or not depressed and signposting them to various things but she’s a lot more time to work with people” (GP)*



## **Strong skills and good working relationships**

It is also clear from client and GP feedback that the specific qualities and skills of the Work Wellness Adviser were central to the success of the project.

*“I think just her personality, people felt able to open up to her and I think patients probably found that very helpful because she was empathic and understanding” (GP)*

*“I really liked [WWA] right away, she was very friendly, very easy to talk to” (Client)*

The WWA took on the role having worked extensively in York previously in relevant fields and whilst they weren't working in the city immediately prior to being appointed, the first two months of the contract enabled them to network and quickly become familiar with the current support landscape in York. The WWA also had important prior working relationships with other staff involved which appears to have helped with the smooth running of the project and relationships involved.

Wider staff involved (in line managing the WWA and managing the project) have also been integral to success, through the strong partnership links they had, in championing and driving the project forward, and also for the flexibility, responsiveness and support provided throughout the contract. This includes ensuring exit strategies are agreed, which have been important considering that whilst this has been a non-clinical intervention, sessions could sometimes stretch the boundaries of this and staff have been conscious not to let the project veer into a counselling service.

*“We had all worked together, we all had an excellent working relationship. City of York Council were given the idea and then we worked closely together to make it a practical reality” (Project team)*

## **Appropriate referrals and signposting**

Perhaps down to the uniqueness of this project not all early referrals were appropriate, both in terms of economic status of individuals (not working, perhaps the norm in such social prescribing and social enterprise projects) and the severity of mental health need, with some being signposted back to their GP. However, this was soon a smooth process with the right kind of referrals coming in and one of the GP's commented that the lack of signposting back to GP's is indicative that the right kind of referrals were being made (lower level mental health needs) and that the WWA managed expectations of support well.

Work Wellness established good links with primary care and organisations in York to support the client's journey, including cross-referring across other social prescribing projects in the city.

*“[WWA] carefully getting to know her clients and signposting them on is a great thing for the client. It's really getting to know them, but also being able to walk away” (Project stakeholder)*

## **Links with employers**

Whilst few clients wanted the WWA to liaise directly with their employers, evidence suggests when this did happen this was beneficial for both employee and employer. One client experiencing high levels of anxiety/panic attacks at work discussed how it was a dialogue between the WWA and their employer which resulted in discussion of reducing their hours slightly and working more flexibly which was actioned, culminating in the employee being in a better place mentally at work.

*“I think from a managerial point of view it was how to understand me better, how to support me better and then if I’m in a stressful situation how to get me out of that stressful situation. That was the goal I was working towards, techniques to get me out of a stressful situation so that I didn’t have mad panic attacks” (Client)*

The project did not set out to specifically raise awareness or educate employers on the topic of mental health, however there was an increasing demand for the WWA to speak at events and share their learning/case studies during the latter stages of the project, including from organisations such as MIND and a large national retailer. The work with the national retailer is an example of ‘added value’ where Work Wellness extended its activity beyond the original remit of the project. Work Wellness delivered the following elements:

- An awareness event in MH Awareness Week
- Mental health drop ins in the staff canteen
- Suggestions for practical adjustments in the work place for managers, based on employee comments
- Existing good practice stories shared with managers
- Advice for managers on how to deal with disclosures of suicidal ideation
- Information for staff about who to contact in a MH crisis; info on MH charities and services; advice about keeping well at work; ideas generated by employees for improvements in their work space

Feedback from the retailer’s management team was very positive and having external input from Work Wellness was very welcome.

*“It was excellent to get [Work Wellness Advisers’] input on outside agencies within the local area that all employees can utilise as well. It was excellent to have someone from outside the company discuss mental health awareness and bring more open conversation and awareness.”*

In addition to this, Work Wellness also contributed to the development of a mental health toolkit developed by HEY Mind, funded by Calderdale College as part of the York North Yorkshire & East Riding Enterprise Partnership ESF Skills Support for the Workforce Programme.

During the lifetime of the project it became apparent through conversations with clients and employers that there appears to be a need for further support and information to be provided to employers on how to manage the mental wellbeing of employees and particularly how to keep positive channels of communication open whilst the employee is signed off. The WWA was uniquely placed to facilitate this communication and advocate on behalf of the client resulting in sometimes very minor adjustments which nevertheless enabled the client to make a positive return to work.

## 5.5 Learning points

It is evident that Work Wellness was a positive experience for clients, GPs and project stakeholders and there are no real criticisms to make. However, project stakeholders and clients offered some reflections that could inform the development of similar projects in the future.

### Support for the adviser

The project team acknowledged that the WWA role was a very demanding one and were mindful of this from the outset by designing the role on a 4 day week basis rather than as a full time post. And although the WWA was well supported by the project team, formal ‘supervision’ time was not necessarily factored into the budget and the extent to which the adviser developed ‘therapeutic’ relationships with clients was perhaps not anticipated.

*“With it being very intense you need regular supervision”* (Project team)

*“I think I would maybe advise having supervision with a counsellor as well, we probably didn’t anticipate that it would have a therapeutic element to it..it kind of falls in the middle, it’s more than learning and work advice..so I would recommend if someone was to do this role that you had supervision with a counsellor.”* (Work Wellness Adviser)

### Managing demand

The project set out with a very modest target of ten and achieved this sevenfold perhaps indicating the scale of latent demand for a project of this nature. The project team felt that if they were to repeat the project they would need to consider limiting the number of appointments per client. Again, suggestive of the need for a project of this nature, client themselves could offer no criticism of the project but simply wanted it to continue. As illustrated below suggestions for improvements from clients relate mainly to the number, length, and availability of appointments:

- More appointments as often they were filled quickly
- Longer (2 hour) appointments
- Availability at more doctors’ surgeries
- A longer initial appointment as the first appointment could be taken up by explaining the issues
- Appointments at different venues

## 5.6 Social value assessment

The Work Wellness team put together a social value assessment of the project using a tool called the Social Value Engine <https://socialvalueengine.com/>. The social value report itself is included as Appendix 7.1.

The principle behind social value assessment is that activities or interventions can have a ‘social value’ that extends beyond the boundaries of the project by generating cost savings for other services/social agencies, e.g. supporting people with mental health issues to stay in work can result in longer term savings in benefit payments and a reduction in demand for NHS services.

In summary, the Work Wellness social value report concludes that Work Wellness generated a Net Social Value of £9.10/£1 across a range of impacts including: Social Prescribing; Advocacy; Transferable Skills/Employability; Improved Mental Health, Confidence and Self Esteem; Resilience; HR Advice; Organisation Culture Change.

As part of the evaluation of Work Wellness we have independently reviewed the approach taken to the social value assessment and have made some suggestions on how this could be improved/adapted for use with other similar projects (including the project in Halifax).

### *Appropriateness of the Social Value Engine as a method of evaluation and impact assessment*

The Work Wellness programme is a small scale pilot of a social prescribing project with the potential of having a significant impact on the individuals involved and on employers and a saving for GP practices and mental health services. The Social Value Engine offers the opportunity to

- assess the unit costs of the intervention,
- quantify the wider social, environmental and economic outcomes of the work,
- impress potential funders with the value, both in terms of quality and quantity that can be produced as a result of future investment.

As the Wellness Programme is providing an intensive service to people who would otherwise be using a GP appointment or mental health services and is providing support to get people back to work, there are considerable savings to be made both to the NHS and to the employer, and potentially the DWP too. Setting outcomes and selecting proxies which relate to a reduction in GP time/frequency of appointments could provide some very useful data. The Social Value Engine is therefore, a useful tool to demonstrate cost savings but also has the ability to collect qualitative evidence of the impact on individuals.

### *Choice of proxies*

The standard way of using the tool is to work from the outcome, which then leads to the choice of proxies. While the proxies that have been chosen represent an appropriate selection to apply to this particular project, it perhaps would have been more appropriate to have set this out the other way round, with the outcome describing what is to be measured and the proxy chosen from a drop down list attached to that outcome with a description of how it will be measured.

The Work Wellness report provides detailed proxy descriptions along with a clear rationale for selecting each proxy.

### ***Preparation for use of Social Value Engine***

If the exercise were to be repeated, ideally this would begin with a Theory of Change which would document the issues that the project aimed to address, the programme objectives, the rationale, the level of input, the activities, the outputs expected/required, the intended outcomes and the intended impacts. This would then inform the choice of outcome from the SVE table as it would be clear what is to be measured.

### ***Methodology used***

Quantitative methods were used for collecting the numbers seen and the numbers ineligible because they were in employment. This provided figures for calculating the unit costs and value for money and to calculate leakage which is one of the deflators, i.e. a service provided to someone who was ineligible.

‘Deadweight’ refers to what might have been achieved anyway without the intervention and the calculations appear to be based on the assumption of a percentage of clients who ‘might’ have self-referred elsewhere, have fallen into long term unemployment, or who have personal coping strategies. It is unclear whether this was based on interviewing a sample of people who had used the service or on assumptions – ideally this would be based on primary evidence. One potential query is whether people falling into long term unemployment should be classified as ‘deadweight’.

‘Attribution’ refers to the proportion of the output that might be claimed by others. It is not clear from the report how this information was accessed and again ideally this would have a clear evidence source e.g. interviews with clients to determine what other services were accessed or via information recorded on referral forms.

‘Drop off’ is hard to calculate and usually relies on subjective judgement, unless a follow up study can be conducted to determine the extent to which positive outcomes are being maintained over time. Post hoc surveys, however, traditionally have low response rates.

‘Displacement’ refers to the phenomenon of a new service being set up which simply displaces a service that was already there and delivering. Within the Work Wellness social value assessment this is all calculated at 0% which is likely to be a reasonably accurate assumption given that the project was considered to be unique within York.

It is unclear whether any qualitative methods were used. If the exercise were to be repeated, there is scope to interview managers on improved workplace culture and on the usefulness of HR related employment advice. A sample of clients could also be interviewed to assess:

- what other groups, activities, services, support have been accessed,
- what were the results of meeting with a manager after receiving the support,
- how well prepared they felt,
- whether they have identified any transferable skills to enable them to move into other employment,
- improved self-esteem and ability to cope with personal challenges.

The figures could then be scaled up. The Social Value Engine is not an exact science but, provided the evaluation is based on sound methodology, it can give some credibility to the figures produced. The figure for the social value produced does seem a bit high which is probably because the calculation of the deflators was based on assumptions rather than research.

If the exercise were to be repeated it would also be useful to have some baseline information against which to measure; this could be provided by collecting information from clients at the start of the intervention or by looking at figures from referring practices. This could include baseline measures of well-being, job satisfaction and self-reported frequency of GP visits.

Overall, the Social Value Engine has been used as it is intended and the rationale for the choice of proxies is sound.

### ***Application to other projects***

In order to assist the Halifax project in carrying out a social value assessment using Social Value Engine, we have provided an example logic model/theory of change (Appendix 7.3) along with a proposed methodology (Appendix 7.2).

## 6. Conclusions

In summary, the project has demonstrated an effective model for supporting employed people who are experiencing low level mental health issues to remain in employment and/or negotiate adjustments or other arrangements with their employers. The project has been exploratory in nature, with modest targets that have been significantly exceeded, which could suggest a latent demand for projects of this nature.

Feedback from GPs was also very positive and, although the evidence is limited, there are indications that by accessing support via Work Wellness clients may have reduced their visits to see their GP thus saving GP time and resource. The location of the WWA within GP surgeries appears to have played a crucial role in maximising the number of referrals and legitimising the intervention.

The holistic, coaching-based approach encompassing mental health and employment has also been successful and feedback from clients has been overwhelmingly positive. Re-building self-confidence eroded by a negative employment situation has been a vital first step in supporting clients to improve their situation. Although most clients did not want the WWA to liaise directly with their employer when this did happen the outcome was very positive.

The skills and experience of the WWA have been central to the success of the project; in particular the non-directive coaching approach in combination with excellent research and listening skills.

Evidence from the social value assessment is also promising in terms of delivering cost savings to the NHS and DWP, employers in terms of reduced recruitment/training costs and increased productivity/engagement and most importantly in keeping people aged 50+ in positive employment and financially secure.

Although not initially an intention of the project, Work Wellness also contributed to awareness raising within the workplace on how best to support employees with their mental health.

In terms of lessons to apply to similar projects in the future, support for the adviser is a key consideration given that some of the support did stray into the realms of counselling. Managing demand would also be a key consideration given the uptake of referrals and the complexity of some of the cases. In terms of evaluation, future projects would benefit from evaluation being built into the project design to include more robust baseline and follow up measures, and similarly more primary research to feed into the development of the social value assessment would be beneficial.

It is clear that the project was fairly unique in its focus and feedback from clients and GPs suggests that its absence will leave a gap in support.



## 7. Appendices

### 7.1 Work Wellness Social Value Engine report

<b>Proxy 1 Cost of a community wellbeing programme with a network approach</b>
<p><b>SVE Area Outcome</b></p> <p><b>5b. improved health and well-being for local residents</b></p> <p><b>Proxy application: Social Prescribing element of the service which links people to community groups and activities and provides info and links to resources to enhance wellbeing, encouraging participation in hobbies, exercise, etc.</b></p>
<p><b>WW Proxy Description</b> Proxy describes the Social Prescribing element of Work Wellness and its wider reach. Work Wellness is a connector: it links people to other services, agencies, community groups, mental health support and resources as well as delivering ad hoc support. This proxy encapsulates the basic universal WW offer for every person referred: 1 hour coaching- based IAG appointment with a mental health-at-work focus, at the end of which people will be referred or signposted elsewhere, receive information on self-help resources or are engaged on the Work Wellness Project. Proxy chosen because everyone seen benefits from at least an hour's in depth appointment, whether or not they decide to go further with the project. They have access to community and other groups due to the social prescribing nature of WW. Appointment also acts as a screening and initial assessment tool.</p>
<p><b>Deflators</b></p> <ul style="list-style-type: none"> <li>- 8% Leakage (of 72 people seen, 11 were not eligible i.e. were unemployed = 8%):</li> </ul> <p><i>to account for those people who were not eligible but who nevertheless benefited from a one hour appointment (by comparison, a private coaching session costs approx. £50-£60 per hour, )including signposting/referring/info and online resources/IAG/personalised mental health and work advice</i></p> <ul style="list-style-type: none"> <li>- 10% Deadweight: Outcome: Develop/highlight networks including work/family/social/community; initial assessment; screening 10% to account for those individuals who might have self-referred to other services and found online resources themselves; one off universal service for all referred</li> <li>-*20% Attribution to account for other services without a mental health or work focus which may have contributed to a person's improved well-being particularly by developing/highlighting their networks and signposting/referring. Services include LACs, W2W, GP, CPN, etc.)</li> </ul> <p><i>*relatively high figure as the Social Prescribing (networking and connecting) aspect of WW can be found in other services</i></p> <ul style="list-style-type: none"> <li>-0% drop off as this proxy is based on the minimum universal service from which everyone benefits by having network/social prescribing opportunity, so there is no diminished return on this one off element of the service</li> <li>-0% Displacement: No displacement of other service anticipated; people can still access other Social Prescribing Services, and there have been two-way referrals, no mutual exclusivity</li> </ul>



**Proxy 2 Average cost of advocacy per hour@ 28 hours****SVE Area Outcome: 6d. Improved ability to affect local change.****WW proxy application: Preparing for and Attending HR/Management meetings with client**

**WW Proxy Description** Proxy describes the \*advocacy aspect of the Work Wellness. Part of the project's remit is helping to prepare vulnerable people for difficult meetings with managers and HR, or OH meetings. WW supplied specific advice on what to say when those individuals were unable to prepare for themselves due to their poor MH, lack of confidence, lack of HR knowledge and/or difficult work relationships. Occasionally WW also represented staff at such meetings

**Deflators**

0% Leakage as proxy only targeted eligible people (i.e. in work) who specifically requested this part of the service, assigned in number of hours

0% deadweight as this aspect of the service was particularly requested by people who couldn't do it themselves and had insufficient inherent resilience, HR/employment law knowledge and coping strategies to self-advocate

5% Attribution (in reality 0%) as this aspect of the service required an in depth analysis of the person's work situation, gathering info on their employers' policies and procedures, and gaining details on their tasks and duties at work: this employment service is not duplicated in that clients do not have direct referral route to a similar service. However, I have applied a 5% Attribution to account for the IAPT Employment Support service, which clients can only access if they are registered with IAPT. One of my clients accessed the Employment Support Service. Her feedback was that this service concentrated more on CVs and interview skills ie general employability) than on HR/Employment Law advice and in depth analysis of an individual's work situation including tasks/duties/stressors/staff dynamics/management structure/workplace culture, and that it had a lesser understanding of mental health.

0% Drop off as this is a specific targeted aspect of the service with a definite outcome – preparing for meetings which happened, giving one off, ad hoc advice therefore no Drop off

0% Displacement: No displacement of other service anticipated; people can still access other services, no mutual exclusivity, this particular aspect of WW not duplicated

**Proxy 3 Emotional Cost of a Year of Unemployment**

Proxy application: employability aspect of service; helping people to recognise their transferable skills and work achievements to keep them in work and prevent unemployment

**SVE Area Outcome****6e Improved Life Satisfaction**

**WW Proxy Description** This proxy was chosen because individuals are vulnerable and are off work with MH issues and therefore at risk of losing their jobs. It reflects the possibility that without Work Wellness these people could have become unemployed - some for up to a year. Of those who may have become unemployed, many would have faced further deterioration of mental and emotional health. The value here is in reducing the risk on unemployment by focusing on the employability aspect of the service ie looking at people's transferable skills and successful work history to keep them in work

*59 people seen by WW are eligible (avg age 45) 34 returned to original post/new post/job retention 5 redundancy or other desired negotiated outcome, 16 outcome pending or Long Term Sick beyond project end: so 39 out of 59 been prevented from entering unemployment and 16 not entered unemployment, as things stand at end of year.*

*As it is hard to predict how many of the remaining 16 pending will return to employment I have assumed 50% will, therefore I have added 8 to the figure of 34 remaining in employment: so 42 people of 70 people seen by Work Wellness were prevented from falling into unemployment, remaining there for a year and experiencing related emotional costs*

#### **Deflators:**

0% Leakage as number of people inputted – \*42 – taking into account participants already discounted due to ineligibility (already unemployed); those who became unemployed during Work Wellness (redundancy, medical dismissal, settlement agreement, etc.), and 50% of those whose outcome was pending at end of project (assumption that the other 50% would return to work)

*(\*one client confirmed new job at end Jan 2019 so figure changed to 43)*

Deadweight: \*20% of those 42 in work, who, without WW intervention, may have fallen into long term unemployment :

*-\*people who are in work (WW target group) are unlikely to be out of work for longer than 21.5 weeks (US stat) therefore not likely to experience a full year of unemployment. However, as this is a **vulnerable** group they are perhaps more at risk, if falling into unemployment, of being unemployed for longer. Therefore, a percentage, without WW support, might feel emotional effects of unemployment for up to a year*

*- individuals' inherent resilience and coping strategies (including medication) specific to this proxy ie mental health recovery and recognition of own skills and contribution to their jobs: approximate percentage of people would have **eventually** returned to work due to financial need/attendance policy/boredom, etc and avoided unemployment*

*\* relatively high figure to reflect the fact that a year is a long time, and many clients, who might have become unemployed without the help of WW, would not necessarily have remained unemployed for a full year due to their recent history of employment*

10% Attribution to account for supportive Line Managers, GPs/other health interventions in ensuring a person is not unemployed for up to a year; related but not duplicated employment related services in the city, e.g. Ways to Wellbeing, LACs, IAPT Employment Advisers, Experience Counts, and ACAS, MIND, Kyra etc. which might reduce the emotional costs of unemployment for up to a year

5% Drop off- very difficult to estimate; 5% as a 'token' estimate because cannot guarantee or account for tracking outcomes for each client after end of project.

*0% Displacement: No displacement of other service anticipated; people can still access other mental health support and employment support this aspect of WW not replicated as a direct referral IAPT ES not direct access, no mutual exclusivity with other services*

<b><u>Proxy 4 Improved Mental Health</u></b>
<b>SVE Area Outcome</b>
<b>5b. improved health and well-being for local residents</b>
<b>Proxy Application Improvement in Mental Health, including work related stress, anxiety and depression; focuses on wellbeing aspect of work</b>
<b>WW proxy description:</b> Proxy chosen as it highlights the wellbeing aspect of Work Wellness working 1-1 on improving people's confidence, encouraging them to recognise and value their attributes, discuss personal challenges and helping rebuild self-esteem;
<b>Deflators:</b> Leakage at 16 % to account for the people who benefited from improved mental health who are not eligible for project(i.e. are unemployed) but none the less received at least one intervention, plus appropriate signposting or referral to other service; 10% deadweight to account for personal resilience and coping strategies ; ie those whose general MH would have improved without WW intervention 15% attribution to GP time on mental health support at ratio of 10 min appointment to 1 hour WW appointment, but only every three weeks avg compared with weekly/bi weekly WW appointment, and to account for any mental health improvements as a result of engagement with mental health groups/charities, NHS statutory services, such as CPN, IAPT service, counselling, medication impact (rarely accessed as very long NHS waiting list and expensive if private) Slighter higher attribution to GPs as MH not work focused proxy, and they don't have work specialism but may have MH one 5% Drop off- very difficult to estimate; 5% as a 'token' estimate (Can't track each client after project ends) <i>0% Displacement: No displacement of other service anticipated; people can still access other mental health support services, no mutual exclusivity</i>
<b><u>Proxy 5 Improved Organisation Culture leading to more motivated staff: average cost of replacing an employee</u></b>
<b>SVE Area Outcome 2D Improved efficiency and dynamism of community and voluntary sector</b>
<b>Proxy application: Focuses on Work Wellness ability to improve motivation of employee and prevent them leaving job, thereby saving on recruitment costs; WW also enables employee to share good practice so that there is a positive change in organisation culture. Managers can improve as well, from advice and recommendations gained through Work Wellness which are shared by employee</b>
<b>WW proxy description</b> Improved motivation of staff due to involvement in Work Wellness and improved work place culture due to returning employee having positive effect on workplace mental health culture through sharing advice gained on Work Wellness and through own improved confidence; recruitment cost savings to the employer due to retention of rehabilitated staff member
<b>Deflators</b> 0 % leakage as only the 44 employed inputted 10% Deadweight to account for employee inherent motivation and ability to affect cultural change without intervention (lower deadweight for this proxy as it takes courage, confidence and knowledge of mental health to influence change amongst managers and this is a vulnerable group); the impact of these people's inherent resilience in retaining their jobs, thereby saving employers' recruitment costs 10% attribution to exceptional Line Management inherent good practice without outside intervention, helping to change culture and retain employee; and

GP/other MH intervention less impactful in this proxy as specific to work culture and lack specialist knowledge  
 5% Drop off- very difficult to estimate; 5% as a 'token' estimate (employees may leave of their own accord  
 0% Displacement as no equivalent service for this particular proxy has been identified; *people can still access other mental health support services and employment advice services, no mutual exclusivity*

#### **Proxy 6 Expert Employment Related HR advice @ 34 hours**

SVE Outcome Area 9 Provision of Expert Business Advice to VCSEs and SMEs (e.g. financial advice, legal advice, HR advice, HSE

WW Proxy Application: WW advised several local employers on HR matters, Mental Health and employment law

WW proxy description: Proxy chosen to reflect WW work, either direct or via letters to clients FAO managers, on HR type advice e.g. RtW recommendations, MH best practice; including advice to CYC HR managers and M & S managers, Phased Returns, Stress Risk Assessments, Action Plan advice

0% Leakage as this aspect of the service specifically requested by organisations or clients FAO employers, as reflected in the hours assigned

0% deadweight as this is specific advice, tailored to individuals' work tasks and duties and organisation policies, procedures and culture and specific, expert recommendations were requested

0% Drop off as this is a specific targeted aspect of the service with a definite outcome –giving one off, ad hoc recommendations, therefore no Drop off

5% Attribution (in reality 0%) as this aspect of the service required an in depth analysis of the person's work situation, and or the organisation gathering info on the policies and procedures, and gaining details on tasks and duties at work: this employment service is not duplicated in that clients do not have direct referral route to a similar service. However, I have applied a 5% Attribution to account for the IAPT Employment Support service, which clients can only access if they are registered with IAPT. Unknown whether or not that service can provide HR, Legal Advice to SMES and other employers

### How the SVE works

The SVE works by breaking a project down into different elements (proxies), and then working out the social return on investment for each proxy

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The cost savings for each proxy are then calculated (cost savings are based on current government approved research)

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A report is then generated combining each proxy's savings, and deducting input costs; a final calculation demonstrates the SROI for the project as a whole

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### Rationale

The assumption is that projects save costs in a variety of ways because they have several beneficial impacts on recipients. Depending on the breadth of its offer, a project can claim cost savings across a range of areas – referred to as proxies. Work Wellness is such a holistic project, and can demonstrate SROI across a number of proxies. Our proxies were chosen from an existing list.

We also requested two additional proxies:

-Outcome: Community-based lifestyle activities including mental wellbeing Proxy: Networked wellness community programme = Social Prescribing element of project

-Outcome: Value from jobs and training services Proxy: Reduction in life satisfaction from unemployment: emotional costs of a year of unemployment

Below are the main areas in which Work Wellness has had an impact, many of which we were able to apply the SVE to:

- Mental health support, advice and information for employee
- Mental health awareness and advice to staff and managers (how to manage stress at work, implement coping strategies)
- Connecting people to community activity as part of a GP social prescribing service
- Helping implement best practice by directly advising employers; and by equipping individuals to impact on work place culture by sharing the good practice explored through Work Wellness
- HR related employment advice to staff and managers (Return to Work Interviews, Phased Returns, Reasonable Adjustments, etc)
- Wellbeing and confidence support, advice, techniques; and where to find supplementary information and resources

- Transferable skills recognition to reintegrate back into job or other work; building self-esteem through acknowledgement of own skills, experience and talents
- CV building and interview tips and preparation

**Explanation of Deflators:**

Deflators are calculated to account for other services and contribution to outcomes. This can be individual action of from a group, such as social prescribing or an advocacy service. However, despite existence of these potential outcome contributors it cannot be guaranteed or expected that clients have accessed these or used their agency. More so, as vulnerable clients, they likely lack the confidence to access these services –and they may not have knowledge of them in the first place. There is also a potential economic limitation at play: while many of these complementary (but not duplicated) services operate free of charge, private counselling or coaching is relatively expensive at an average of £55 per hour. Often WW has signposted or referred clients to services they were unaware of. Due to clients potential to access services but not definite actual access, this analysis has assumed ‘best case’ of what services a clients may access. In addition there are waiting lists, eligibility factors, travel and schedule issues, and other factors which might limit access to such services that contribute to WW outcomes.

‘Best case’ assumption has been applied throughout this evaluation of Work Wellness to ensure no over-claim of outcomes. Therefore the SROI figure of approx. £9 is minimum estimated WW. It is highly likely the SROI is higher; however this analysis acknowledges the complexity of the social and community world, and the environmental, economic, health and social situation of clients.

## Social Value Engine report

Output	Outcome	Financial Proxy	Unit Cost	Units	Time Period	Leakage	Deadweight	Attribution	Drop-Off	Displacement	Total Annual Return	Total Project Return	Source
Improved staff motivation/Improved mental health practice' workplace	2d. improved efficiency and dynamism of community and 'best voluntary in sector. Cost savings on recruiting new staff	improved organisational culture leading to more motivated staff - average cost of replacing an employee	£10,185.00	43	1 year	£0.00	£43,795.50	£43,795.50	£21,897.75	£0.00	£437,955.00	£437,955.00	<u>CIPD</u>
Value from Jobs and Training Services (for Adults)	6e. improved life satisfaction	emotional cost of a year of unemployment	£1,086.00	43	1 year	£0.00	£9,339.60	£4,669.80	£2,334.90	£0.00	£46,698.00	£46,698.00	<u>The Social Impact of Housing Providers, Daniel Fujiwara, 2013 (p31-32)</u>
Community Based Lifestyle Activities Including Mental Wellbeing	5b. improved health and well-being for residents. 5b	cost of a community wellbeing programme with a network approach	£38.11	72	1 year	£219.51	£274.39	£548.78	£0.00	£0.00	£2,743.92	£2,743.92	<u>PSSRU Unit Costs of Health and Social Care 2017 (p87)</u>

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Output	Outcome	Financial Proxy	Unit Cost	Units	Time Period	Leakage	Deadweight	Attribution	Drop-Off	Displacement	Total Annual Return	Total Project Return	Source
Work Wellness Adviser	Improved health and wellbeing for local residents 5b. Improved health and wellbeing, including work related stress and anxiety, a result of engagement with work related stress, anxiety and low mood 6d.	Improved mental health	£0.00	72	1 year	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	<u>Citizens Advice Bureau, Modelling Our Value to Society 2015-2016</u>
Advocacy	improved ability to affect local change. Preparing for and Attending	average cost of advocacy	£36.00	28	1 year	£0.00	£0.00	£50.40	£0.00	£0.00	£1,008.00	£1,008.00	<u>Children Society, Calculating Cost</u>



Output	Outcome	Financial Proxy	Unit Cost	Units	Time Period	Leakage	Deadweight	Attribution	Drop-Off	Displacement	Total Annual Return	Total Project Return	Source
	HR/Management meetings with client												
Expert Employment based HR legal advice	national framework. Recommendations for Return to Work and HR advice	provision of expert business advice to vcses and smes (e.g. financial advice / legal advice / hr advice/hse)	£84.00	34	1 year	£0.00	£0.00	£142.80	£0.00	£0.00	£2,856.00	£2,856.00	<u>National TOMS Framework</u>

## Returns

1. Active, Inclusive and Safe	£0.00
2. Well Run	£437,955.00
3. Environment	£0.00
4. Well Designed and Built	£0.00
5. Well Connected	£2,743.92
6. Fair to Everyone	£47,706.00
7. Thriving	£0.00
8. Well Served	£0.00
National TOMS Framework	£2,856.00
Added by User	£0.00

## Expenditure

Direct Costs	£40,000.00
Other: Equipment	£
Other: Advice	£
Other: Borrowing	£
Other: Expertise	£
Other: Mentoring	£
Other: Volunteering	£
	£40,000.00

## Less

Leakage	£219.51
Deadweight	£53,409.49
Attribution	£49,207.28
Drop-Off	£24,232.65
Displacement	£0.00

Total Return after leakage, deadweight, attribution, drop-off and displacement £388,424.64

Total Expressed as a Net Present Value £364,191.98

The Gross Social Value	The Net Social Value
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is £12.28/£1

is £9.10/£1

Value from Jobs and Training Services (for Adults)	see separate document for proxy description
Community Based Lifestyle Activities Including Mental Wellbeing	Number of Units: per person.
Improvement in wellbeing, including work related stress and anxiety, as a result of engagement with Work Wellness Adviser	See separate supporting document for description of proxy
Advocacy	Hours of Advocacy: see supporting document for full description of proxy
Expert Employment based HR and legal advice	34 hours of WW advice to local employers on HR matters, including RtW recommendations, MH best practice, Phased Returns, Stress Risk Assessments, Action Planning - either direct or through letters to client FAO employer
Improved staff motivation/Improved mental health 'best practice' in workplace	See separate supporting document for explanation of deflators
Value from Jobs and Training Services (for Adults)	See separate supporting document for explanation of deflators
Community Based Lifestyle Activities Including Mental Wellbeing	See supporting document for full explanation of this proxy and deflators
Improvement in wellbeing, including work related stress and anxiety, as a result of engagement with Work Wellness Adviser	See supporting document for explanation of deflators
Advocacy	See supporting document for explanation of deflators
Expert Employment based HR and legal advice	Separate document describing Proxy, including details of Deflators

## 7.2 Work Wellness social value assessment proposed methodology

The aim of the research is to collect evidence of the programme producing a social return on investment, using the Social Value Engine to:

- measure the economic and social impact and health benefits of keeping people in work who are primarily over 50 and experiencing mental health problems,
- identify the activities and conditions that provide the success factors to enable people back into work.

The methodology comprises the following stages and collection methods.

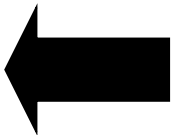
1. Baseline setting which involves gathering data on the evidence of need and demand for this service including:
  - statistical data on days lost from work by people over 50 for reasons of mental ill health,
  - other provision made locally that aims to meet the same need,
  - the demand on primary health care and mental health services by people over 50 with mental ill health, (figures available from CCG and local Mental Health Trust)
  - collection of statistical information: numbers seen and financial resources committed to the project.
2. Interviews with managers who have taken part, using a semi structured survey form to find out:
  - the usefulness of the advice on collaborative approaches,
  - what practical changes in the workplace it had led to,
  - identification of any cultural shifts that have taken place,
  - evidence of staff retention,
  - evidence of reduced absence through sickness,
  - evidence of increased productivity.
3. Interviews with advisers using a discussion guide to find out:
  - where did referrals come from?
  - what work based advice and support were you asked to deliver?
  - what signposting and referrals did you make?
  - examples of particular successes.
4. Interviews with key stakeholders, including GPs or Practice Managers from sponsoring practices and other referrers to find out:
  - any noticeable change in numbers of people over 50 in work being seen with mental health issues,
  - reduction in sickness absence certifications for this reason,
  - reduction in referrals to mental health services
  - any decrease in clinical prescribing for mental health issues in patients over 50,
  - any new contacts with other services or agencies in the voluntary and community sector.

5. Interviews with people who have received the service using a discussion guide to gather information about:
- what other groups, activities, services, support and resources have been accessed as a result of this intervention,
  - any changes in lifestyle made as a result of the intervention,
  - what were the results of attending a meeting with managers,
  - how well prepared they felt,
  - have they identified any transferable skills that can enable them to move into other employment?
  - improved self-esteem and ability to cope with personal challenges,
  - what other strategies they were using to deal with the issue,
  - how long the effect of the intervention has lasted or is likely to last,
  - any other services they were using that they stopped using once involved in this programme?
  - any other services they were using at the same time for the same purposes,
  - how useful was the action planning process,
  - time lost from work due to sickness since the intervention, if any.

Project: Work Wellness

Conditions

High numbers of people over 50 employed but signed off with mental health issues.  
Increasing number of people over 50 absent from work due to ill health likely to fall out the labour market altogether.



Intended impacts

To patients

- Improved health and wellbeing
- Supports health and lifestyle change
- Improved self-esteem and confidence
- More specialised local knowledge
- Speed of referral
- Allowing time to be heard.

To GP practice

- Reducing frequent practice attendance
- More appropriate use of GP time
- Easy referral
- Provides links between the VCS and primary care
- Increased range of practical services
- Encouraging and supporting self-care.

Cost saving

- Decreased reliance on GPs
- Decrease in clinical prescribing
- Decreased need for acute services

Programme objectives

To test out the theory that a non-clinical intervention can have a positive impact on ensuring people with mental health conditions can remain in work long term providing benefits both to individuals and the wider economy.

Rationale

52 A holistic approach based on a Social Prescribing Model can offer a safe space to discuss problems and develop solutions, giving access to a wide range of information and signposting, and help people back to work.

Inputs

Project management by an independent consultant contracted to West Yorkshire Combined Authority.  
One Work Wellness Advisor based in a GP practice.  
Accommodation provided by GP practice.

Activities

60 minute one to one appointments with a Work Wellness advisor, based in accommodation offered by a participating GP practice, to develop an action plan.  
Advice to employers on collaborative approaches to managing mental health at work.

Outputs

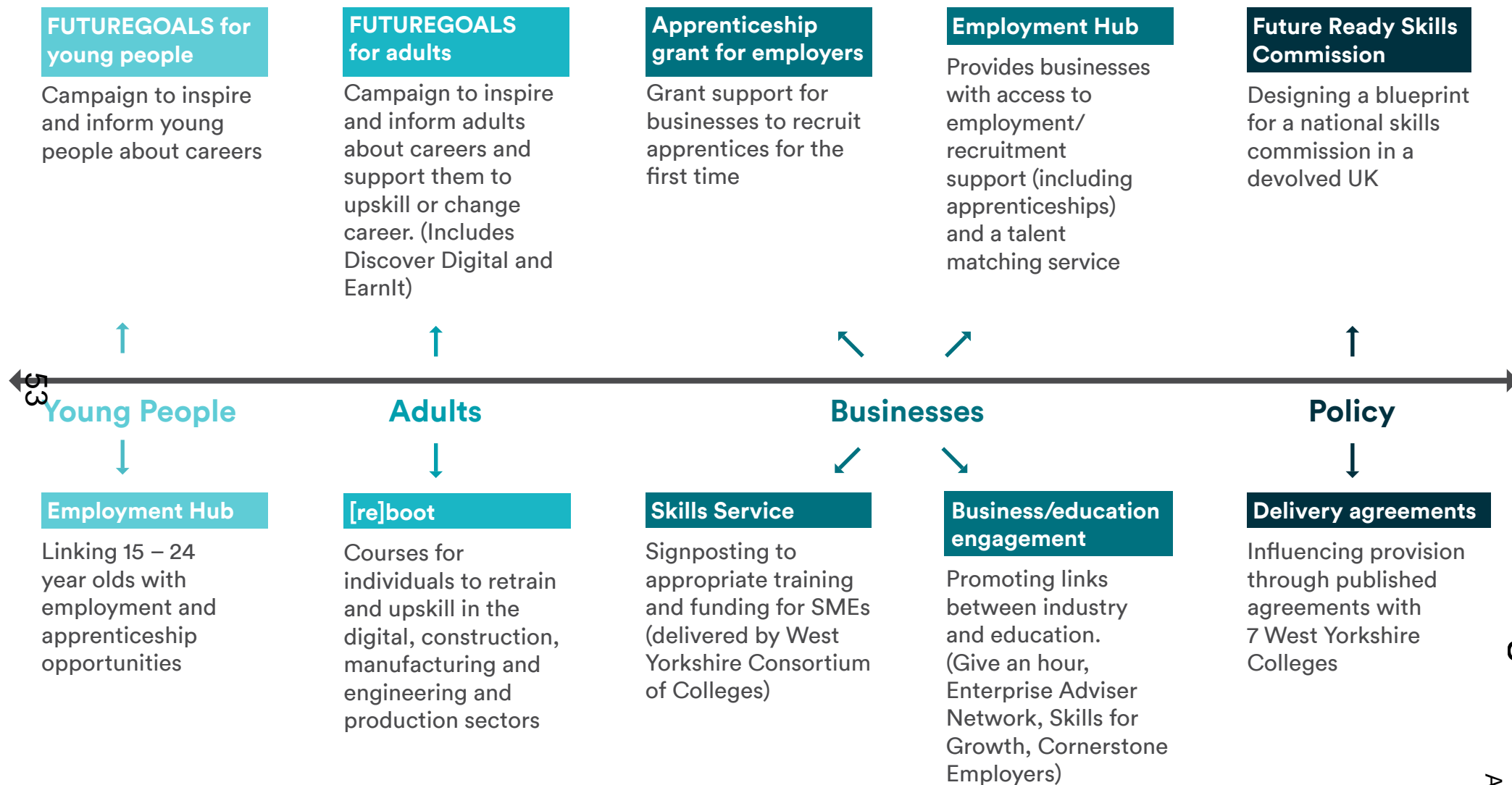
A minimum of ten people in target demographic are enabled to remain in work or to return to the workplace.

Intended outcomes

Time and resource savings for GPs  
Talented staff are retained  
Sickness and recruitment costs saved  
Productivity flourishes.



# Leeds City Region employment and skills offer



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**Report to:** Employment and Skills Panel

**Date:** 12 September 2019

**Subject:** Labour market information

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**Director(s):** Alan Reiss, Director of Policy and Strategy

**Author(s):** Peter Glover

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## **1. Purpose of this report**

- 1.1. The purpose of this report is to update Panel Members on the LEP's labour market intelligence programme for 2019/20. A presentation on the key messages from the analysis will be made at the meeting.

## **2. Information**

- 2.1. The key purpose of the labour market intelligence work is to provide robust analysis of the City Region's labour market and skills needs in order to influence planning and action by key audiences. As well as being used to support strategy and policy development by the LEP, the analysis is used to shape the focus of local learning delivery with reference to evidence of labour market demand and to inform careers choice by individuals by providing clear and robust information on labour market opportunities.
- 2.2. This year's activity has been influenced by national policy developments around Skills Advisory Panels (SAPs). The purpose of SAPs is to bring together local employers and skills providers in order to develop a shared understanding of local skills needs and to define clear priorities. These deliberations need to be under-pinned by an evidence-based approach grounded in high quality labour market analysis.
- 2.3. At the Panel meeting of 28 February it was agreed that the ESP should take on the SAP functions as part of its existing remit, since they are largely complementary to its current role. This involves some changes to governance arrangements for the ESP, including the addition of a voluntary sector representative. These changes are currently being implemented.
- 2.4. The labour market analysis produced to inform SAPs is also required to comply with quality standards set out by the Department for Education (DfE). These have been taken into account in the development of our latest labour

market report and interim feedback from DfE indicates that the standards will be met.

- 2.5. The report will be published in October and will be supported by a programme of workshops to disseminate the headline results to key stakeholders, including education and training providers, careers professionals, businesses and local policy makers.

### **3 Financial Implications**

- 3.1 There are no financial implications directly arising from this report.

### **4 Legal Implications**

- 4.1 There are no legal implications directly arising from this report.

### **5 Staffing Implications**

- 5.1 There are no staffing implications directly arising from this report.

### **6 External Consultees**

- 6.1 No external consultations have been undertaken.

### **7 Recommendations**

- 7.1 The Panel is asked to note the latest developments around the production and dissemination of the LEP's labour market intelligence.
- 7.2 The Panel is asked to comment on the key messages from the labour market analysis. These will be incorporated into the final version of the report prior to its publication in October.

### **8 Background Documents**

None.

### **9 Appendices**

None.

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**Report to:** Employment and Skills Panel

**Date:** 12 September 2019

**Subject:** **Local Industrial Strategy Development**

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**Director:** Alan Reiss, Director of Policy, Strategy and Communications

**Author(s):** Emma Longbottom

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## **1. Purpose of this report**

- 1.1 To update the panel on progress to develop a Local Industrial Strategy (LIS). This paper provides an update on the development process, while a presentation at the meeting will provide an overview of the emerging draft priorities.

## **2. Information**

- 2.1 As previously reported, a LIS is being developed for the LEP area which will focus on bold steps aimed at boosting productivity and driving inclusive and clean growth for a post-2030 economy. This will be completed by December 2019, to be signed off by Government in March 2020.
- 2.2 Work has commenced to identify key priorities against the five foundations of productivity – People, Place, Infrastructure, Ideas and Business Environment, which are being further developed and tested over the autumn to ensure that the LIS is reflective of all parts of the region, maximizing the potential of key strategic assets and reflecting the diversity of place.
- 2.3 In addition, Government has set out four Grand Challenges – Clean Growth, Artificial Intelligence and Data, Future of Mobility and Ageing Society. Work is also being undertaken to identify local strengths, assets and opportunities, in order to demonstrate how and where Leeds City Region can contribute to one or more of these global challenges.
- 2.4 The LIS is being co-produced with Government. Its ultimate endorsement by Government will mean it is a local expression of Government policy, making it a particularly powerful and influential strategy which will have an impact on future decisions about the region, for instance with regards to funding.

## Process

- 2.5 Government guidance is clear on the need for LISs to be underpinned by robust evidence which draws out relative strengths and weaknesses, with an emphasis on productivity. The draft economic analysis is now complete, which will be further developed to support the policy priorities and narrative over the autumn.
- 2.6 As previously reported, work was commissioned where a gap in the existing knowledge base and a more intensive examination of the issues was required to determine areas of distinctiveness across the LEP area. These commissions are now nearing completion and will be published as part of a suite of evidence on the LEP website.
- 2.7 Over 700 people have attended and taken part in over 40 consultation and engagement activities to date. These meetings and events presented the headlines from the draft economic analysis and provided forums to discuss the implications for the LIS and possible areas of focus. Consultees have included: LEP Board Panels; businesses; business representative groups such as the Chambers of Commerce and Federation of Small Businesses; universities; local authorities; District level economic and business partnerships; sector groups; and community and citizen groups
- 2.8 In addition, two calls for evidence have been completed through the LEP website. A broad range of stakeholders responded to these and provided information to support and further inform the development. The responses to the initial call for evidence provided information regarding inclusive growth, construction skills, innovation and utilization of work-place skills. The second, which was more focused around the foundations of productivity provided useful insight which has supported the development of the draft priorities.
- 2.9 In order to understand the priorities and needs of individuals within the region an online YourVoice consultation exercise has been undertaken, which closed on 30 August 2019.
- 2.10 Engagement with young people has also commenced to understand their ambitions for the region. To date 45 young people have taken part in two focus groups. Further workshops will take place in September.
- 2.11 The initial economic analysis and associated commissions have been brought together with the consultation feedback to inform the draft priorities, which will be consulted on during the second phase over September and October. The draft priorities regarding the People foundation of productivity have been included learning from the Future Ready Skills Commission and will be presented verbally at the meeting.

- 2.12 Panel members are asked to provide feedback regarding the ambition of the priorities, whether they will improve productivity in the region and any areas they feel are missing.
- 2.13 To provide external rigour to the LIS development process an independent panel was established to provide expert challenge and advice, and critical review of the evidence base and subsequent policy priorities. The panel met for the second time on 9 July and provided feedback regarding the findings of the external commissions. A final meeting is planned for October to consider the priorities for the LIS and associated outcomes, along with the implications for policy development.
- 2.14 The process to develop the LIS will be iterative and will therefore evolve. Engagement and co-production with Government will be undertaken throughout the development process to ensure that the LIS is completed and submitted to Government in December 2019. Engagement with government has been ongoing throughout the development process. This includes:
- Monthly attendance at Project Board meetings
  - Workshop with Cities and Local Growth Unit (CLGU) and Business, Energy and Industrial Strategy (BEIS) analysts in March
  - Meetings with key departments on the foundations of productivity
  - Workshop with CLGU, BEIS and Yorkshire LEPs in June
  - Innovation workshop with BEIS, CLGU, Innovate UK, Institute for Manufacturing and northern LEPs in June
  - Infrastructure workshop with CLGU, DfT and Yorkshire LEPs in September.
  - Individual sessions with relevant departments will be arranged in September once draft priorities have been agreed.

### Key Milestones

- 2.15 Key milestones for the development of the LIS throughout 2019 are:
- Initial call for evidence completed May
  - Initial economic evidence report complete June
  - Initial stakeholder engagement completed August
  - Second call for evidence completed July
  - Initial economic evidence report published August
  - Draft policy proposals completed August
  - Consultation and engagement on draft proposals September/October
  - LIS drafted and tested October/November
  - LIS finalised and submitted to Government December
  - LIS published March 2020

## **3. Financial Implications**

- 3.1 In addition to core staff resource to support research and intelligence and policy development activity, a budget of approximately £200,000 is available from Combined Authority / LEP internal budgets across the financial years 2018-19 and 2019-20 to support development of the evidence base for the

Local Industrial Strategy. In addition, funding identified in the 'Strengthened Local Enterprise Partnerships' has been allocated and approved by Government.

#### **4. Legal Implications**

- 4.1 There are no legal implications directly arising from this report.

#### **5. Staffing Implications**

- 5.1 The LIS development forms a central component of the Combined Authority and LEP's programme of work to broaden its policy range. This will require capacity and expertise from the Combined Authority, local authorities and other partners. This can largely be provided within existing resources.

#### **6. External Consultees**

- 6.1 A programme of external engagement is being undertaken to inform the development of the Local Industrial Strategy (see paragraphs 2.7-2.10).

#### **7. Recommendations**

- 7.1 That the panel notes the progress made.
- 7.2 Members provide feedback on the draft priorities.

#### **8. Background Documents**

- 8.1 None

#### **9. Appendices**

- 9.1 None

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**Report to:** Employment and Skills Panel

**Date:** 12 September 2019

**Subject:** **Channel 4 and Digital Sector Support**

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**Director(s):** Henry Rigg, Executive Head of Economic Services

**Author(s):** David Shepherd, Charlotte Michael

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## **1. Purpose of this report**

- 1.1 To provide the Employment and Skills Panel with a progress report on the Channel 4 project and subsequent delivery, and to outline the Combined Authority and LEP's increased support for the creative and digital sector through both the Creative Industries Opportunity Programme and the Digital Inward Investment Fund.

## **2. Information**

### **2.1 Channel 4 National HQ – Delivery Update**

#### Background

Since the relocation decision on 31 October 2018, Channel 4 has shown a strong commitment to its Nations and Region strategy, particularly with regards to its investment in Leeds City Region. Currently based in Platform, the team is expanding across a number of roles and currently recruitment of local talent into its Technology team is well underway.

Alongside this, a number of other companies within the sector have made investments in the region. These include:

- Pact (Producers Alliance for Cinema and Television)
- UKTV
- Workerbee (Endemol Shine North)
- The Garden
- NFTS (National Film and Television School)
- Wise Owl Films (Lime Pictures)

The Channel 4 Partnership Board has also been established, with representatives in attendance from across Leeds City Region and Channel 4. The board oversees the delivery of our commitments to growing the TV production sector and wider creative industries across the City Region, which have so far encompassed the following activities;

### Sector Growth

Post-Channel 4 announcement, a number of activities have taken place to maximise the benefits.

- Redefining criteria of our existing schemes in order to make them more accessible to the creative industries (further outlined in section 2.3)
- Increasing knowledge of our business support schemes to the sector through our recent 'Let's Talk...Production' campaign
- Developing a number of bespoke initiatives under the 'Creative Industries Opportunity Programme' (further outlined in section 2.2)
- Ongoing engagement and account management with companies within this sector
- Communications with Growth Managers across the City Region to increase awareness of the needs of this sector and various support schemes available, both through the LEP and external organisations such as Universities, Screen Yorkshire and Creative England

### Skills Development

Post-Channel 4 announcement, a number of activities have taken place to coordinate the skills ecosystem and address the anticipated needs of the sector.

- A number of sub-groups involving industry and education providers have been formed to ensure productive discussions are taking place. These groups are as follows:
  - Skills Working Group: comprised of local authority and Combined Authority skills representatives and Screen Yorkshire
  - TV Indies Panel: a formal group of independent production companies that help steer and shape the required interventions
  - Broadcaster Collaboration: a group of major broadcasters who convene to ensure the collective needs of the sector are understood and economies of scale are achieved
- Screen Yorkshire continues to be a key partner in the delivery of a range of initiatives including the successful Beyond Brontes programme, developed in partnership with Bradford Council, which offers targeted support to young talent from underrepresented communities looking to enter the screen industries. They are also continuing to enhance their Connected Campus initiative, which aims to create a network between universities and the screen industries.
- Existing city regional activity that contributes to addressing the skills issues and employment opportunities associated with the relocation of Channel 4's headquarters include:



- The FutureGoals careers campaign, and activity to showcase creative careers, in partnership with the Burberry Foundation <https://futuregoals.co.uk/creative/>
- Fully funded training through [re]boot for career changers and underemployed graduates to re-train and access employment in skills shortage occupations including digital and production skills
- Employment and apprenticeship brokerage for 15-24 year olds through the Employment Hub
- The Skills Service is exploring the opportunity to support Assistant Editor training to address an acute skills shortage area
- A series of programmes and events have been identified that provide opportunities to develop a collaborative approach between Channel 4, Creative and Cultural Skills, Screenskills and local authorities. These will inform and enthuse the next generation of talent through the provision of Channel 4 open days, Discover! Creative Careers week, industry-led apprenticeship seminars and 'Open Doors'

### Infrastructure

- Established the Engine House as a post-production opportunity. The Expressions of Interest process is now complete and Leeds City Council are liaising with companies to seek a tenant. Completion is expected from Autumn 2019 as part of the wider Southbank regeneration
- A major TV and Film studio space in Leeds has now been announced. Negotiations are expected to be finalised later in the year, following which fit-out works will commence

## **2.2 Creative Industries Opportunity Programme**

### Overview

The Creative Industries Opportunity Programme has been created to maximise upon Channel 4's decision to open its National HQ in Leeds. The scheme will encompass a range of bespoke initiatives that were identified as critical during the bid to attract Channel 4 and designed to facilitate the growth of the sector and mitigate any concerns caused by its rapid expansion in the region. The initiatives will have a strong inclusivity focus and will encompass three main objectives;

- To support our region's young talent and diverse communities to benefit from the Channel 4 investment, leading to the development of the region's talent base. It is anticipated that this could be done through mentoring schemes, coordinated work placement schemes, specialised bootcamps and enhanced training provision delivered with steer from relevant industry bodies;
- To support the regional ecosystem of creative, digital and production companies to benefit from the Channel 4 investment, at pace, leading to the expansion of the production sector;

- To support Channel 4 to successfully relocate to Leeds City Region, to establish operations in the region, build networks with industry and key stakeholders – meeting their timescales and deadlines;

It is anticipated that the Opportunity Programme will progress through the Combined Authority's assurance process throughout Q4 2019 and the initiatives will run until December 2022.

## 2.3 **Digital Inward Investment Fund (DIIF)**

### **#Welcome & #Grow**

The Digital Inward Investment Fund consists of two branded grant schemes – these are #Welcome (for new to region businesses) and #Grow (for indigenous businesses wishing to grow).

Both grant schemes assist and incentivise digital and creative companies to invest in Leeds City Region, offering grants of between £10k to £50k to eligible businesses. The aim of this fund is to create jobs and increase the number of businesses operating in this key growth sector.

Recently the Digital Inward Investment Fund criteria has been expanded to include companies already based within Leeds City Region, in order to capitalise on the anticipated growth of the digital sector and subsequent supply chain benefits of the Channel 4 investment. Potential demand for this support has already become apparent, with over 30 enquiries received by the LEP since April 2019 from SMEs seeking investment and support to achieve business growth. 94% of creative sector businesses in the City Region are micro-businesses and therefore often fall below the threshold of our existing support schemes.

## **3. Financial Implications**

- 3.1 There are no financial implications directly arising from this report.

## **4. Legal Implications**

- 4.1 There are no legal implications directly arising from this report.

## **5. Staffing Implications**

- 5.1 There are no staffing implications directly arising from this report.

## **6. External Consultees**

- 6.1 Extensive consultations have taken place with key organisations in the sector and relevant industry bodies to inform the expansion of our creative industry support, alongside steer from the Channel 4 Partnership Board.

## **7. Recommendations**

- 7.1 That the Panel notes progress on delivery following the Channel 4 investment decision.
- 7.2 That the Panel notes progress on the Digital Inward Investment Fund and the increased support it will provide in expanding the digital and creative industries.

## **8. Background Documents**

None.

## **9. Appendices**

None.

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**Report to:** Employment and Skills Panel

**Date:** 12 September 2019

**Subject:** **Skills Commission and Policy Insight**

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**Director:** Alan Reiss, Director of Policy and Strategy

**Author(s):** Sonya Midgley, Peter Glover

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## **1. Purpose of this report**

- 1.1 To update the Panel on the work of the Future-Ready Skills Commission.
- 1.2 To seek comments from the Panel on the role of technical education and training in meeting the needs of the local economy that will be used to inform a policy statement on Technical Education. Discussion at the meeting will be informed by a short presentation.

## **2. Information**

### **Employment and Skills Plan Policy Statements**

- 2.1 At the September 2018 meeting of the Panel it was agreed that the refreshed Employment and Skills Plan will consist of thematic policy statements, each of which will be separately developed and approved by the Panel.
- 2.2 The statements will ultimately be presented via an online resource (currently under development) that will incorporate the LEP's entire policy framework. This will provide a more agile and flexible system which will be easier to update and will be accessible to the public.
- 2.3 Three policy statements have been approved by the Panel to date, relating to higher level skills, apprenticeships, and careers information and inspiration.

### **Future-Ready Skills Commission for a Devolved UK**

- 2.1 The Future Ready Skills Commission was launched in January 2019, is chaired by Councillor Hinchcliffe, and is made up of leading thinkers from education, think tanks and business (full membership is available via <http://futurereadyskillscommission.com/meet-the-commissioners/>). Its aim is to set

out a bold and ambitious blueprint of how the skills system can work better for regional and national economies, using Leeds City Region as a case study. The Commission is supported by the Combined Authority, although it sits outside LEP and CA governance arrangements.

- 2.2 The Commission has considered evidence against the three key themes within its scope: technical education, careers information and inspiration and workforce skills. A call for evidence and literature review have been completed and the Commission will now move into a phase of defining the key principles of a Future-Ready Skills System before publishing an interim report in October, and final report in late Spring 2020.

### Technical Education

- 2.3 Technical education and training provides individuals with the technical knowledge and skills required to enter skilled employment. Its scope extends from a level 2, the basic threshold for employability, through to levels 4 and 5 and beyond, equipping people for professional-level employment. Within the Commission's definition, basic skills provision is also within the scope, since literacy and numeracy are preconditions for entry into and progression within the technical education and training system.
- 2.4 The above definition is reflected in the following activities and funding streams:
- Apprenticeships at all levels from intermediate (level 2) to higher / degree level (levels 6 and 7)
  - Technical education study programmes for young people (16-19), soon to be reformed through the introduction of T-Levels
  - Technical and professional education at level 4/5 and above, delivered through further and higher education institutions, in the form of higher and degree apprenticeships, foundation degrees, HNCs/HNDs etc
  - Adult (post-19) education delivered through further education colleges and independent training providers.
  - Basic skills provision and community learning are also included, since they provide an important progression route into mainstream technical education and training.
- 2.5 At local level, and particularly within mayoral areas, a range of activities are underway that seek to provide leadership to the local skills system, including technical education and training. The focus is on making provision more responsive to the needs of the local economy, addressing local skills priorities and reducing the complexity and fragmentation of national skills policy through an integrated and coherent local approach.
- 2.6 At national level there is also a series of policy reforms underway that seek to improve the workings of the technical education and training system, including the ongoing implementation of the apprenticeship levy, the development of T-Levels and the review of Level 4-5 education.

- 2.7 The early findings of the Commission that relate to the technical education agenda are:
- The apprenticeship levy is not enough and is creating a “false choice”, between entry level and high-level provision of apprenticeships. The scope of the levy is limited but there is increasing evidence that businesses are turning to apprenticeships to address all of their skills requirements.
  - Adult learning is in sharp decline. The learner finance system is misunderstood and under-utilised by individuals which has contributed to the decline with adults unclear about which courses would be valued by employers.
  - More investment is needed. There is a lack of fair and sufficient funding within the skills system, particularly in FE. Future funding should take into account the current and future local labour market needs and seek to be more flexible in meeting the requirements of employers.
  - Business engagement with the technical education system needs to be simplified and made local. Businesses are overwhelmed with the volume of choice and brokers seeking to engage with them. At the same time the skills offer does not resonate with many SMEs, and some disengage altogether. A skills offer for business requires local coordination.
  - There should be local influence over the prioritisation of the funding of technical training routes, including T-levels and apprenticeships, at the level of a functional economic area and linked to local skills priorities.
- 2.8. To provide the basis for discussion a short presentation will be given at the Panel meeting that will cover the following areas:
- The current landscape
  - The challenges facing the current system
  - Lessons from the Mayoral Combined Authorities
  - Potential responses to the challenges
  - Questions to inform discussion by the Panel.
- 2.9 The Panel should consider the local implications of this information, including the early findings at 2.7 above.
- 2.10 Panel members will be asked to discuss the following questions after the presentation:
- What should the LEP’s overarching objective be in this area?
  - What should be the key messages to Government on national policy development, including priorities for a devolution deal?
  - How can the LEP engage with employers on this agenda?

### **3. Financial Implications**

- 3.1 There are no financial implications directly arising from this report.

### **4. Legal Implications**

- 4.1 There are no legal implications directly arising from this report.

**5. Staffing Implications**

- 5.1 There are no staffing implications directly arising from this report, work will be completed within current staffing structures.

**6. External Consultees**

- 6.1 No external consultations have been undertaken.

**7. Recommendations**

- 7.1 That Panel members note the progress made by the Commission and provide comments on the emerging findings relating to technical education.

**8. Background Documents**

None.

**9. Appendices**

None.



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**Report to:** Employment and Skills Panel

**Date:** 12 September 2019

**Subject:** **Forward Agenda Plan**

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**Director(s):** Alan Reiss, Director of Policy, Strategy and Communications

**Author(s):** Peter Glover

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## **1. Purpose of this report**

- 1.1. This report sets out a proposed forward agenda plan for the Employment and Skills Panel for the Panel's approval.

## **2. Information**

- 1.2. A forward agenda plan is provided below, which outlines the proposed items for future Employment and Skills Panel meetings.
- 1.3. This forward plan takes into account:
- Items suggested by panel members (including those minuted at the meeting of 28<sup>th</sup> February)
  - The Panel's role in overseeing the delivery of Economic Services' operational programmes and future service plans
  - Items that need to be addressed in order to inform the development of the Combined Authority's policy framework
  - The Panel's role in shaping the development of the Local Industrial Strategy
  - The ongoing work of the Future Ready Skills Commission and the opportunity to feed the emerging findings into local thinking as well as to provide feedback to the Commission
  - Opportunities for joint sessions with the Business Innovation and Growth Panel focusing on issues of joint interest such as the nature of the support offer to business.
- 1.4. Panel members are invited to consider the suitability of this forward programme, in the context of the Panel's terms of reference and emerging policy and operational priorities.

### **3 Financial Implications**

3.1 There are no financial implications directly arising from this report.

### **4 Legal Implications**

4.1 There are no legal implications directly arising from this report.

### **5 Staffing Implications**

5.1 There are no staffing implications directly arising from this report.

### **6 External Consultees**

6.1 No external consultations have been undertaken.

### **7 Recommendations**

7.1 It is recommended the Panel consider and agree the forward agenda plan.

### **8 Background Documents**

None.

### **9 Appendices**

Appendix 1 – Draft Panel Work Programme.

## Appendix 1

### Employment and Skills Panel (Forward Agenda Plan) 2019/20

Committee Date: 27 November 2019		
Report Title	NOTES	Officer Responsible for
Chair's Update		Verbal
Local Industrial Strategy	<ul style="list-style-type: none"> <li>To provide an update on progress with the Local Industrial Strategy</li> </ul>	Emma Longbottom
Policy insight – workplace skills and business leadership	<ul style="list-style-type: none"> <li>To consider the implications of the Future-Ready Skills Commission's findings for the City Region's local approach</li> </ul>	Sonya Midgley, Peter Glover
Delivery Agreements	<ul style="list-style-type: none"> <li>Update, following positions on LMI and role of technical education.</li> </ul>	Michelle Burton
Employment and Skills Programmes	<ul style="list-style-type: none"> <li>Update against business plan.</li> </ul>	Michelle Burton

COMMITTEE DATE: 25 February 2020		
REPORT TITLE	NOTES	OFFICER RESPONSIBLE
Chair's Update		Verbal
Local Industrial Strategy	<ul style="list-style-type: none"> <li>Update on progress with the Local Industrial Strategy (people foundation)</li> </ul>	Emma Longbottom
Labour market – business demand and inclusion	<ul style="list-style-type: none"> <li>Policy discussion on labour market supply/inclusion</li> <li>Any initial/emerging Brexit impacts.</li> </ul>	Peter Glover, Jonathan Skinner
Reviewing performance: employment and skills projects	<ul style="list-style-type: none"> <li>To review progress against high level ambitions set out in our Employment and Skills plans</li> </ul>	Michelle Burton, Peter Glover
Digital Framework	<ul style="list-style-type: none"> <li>Progress of the Digital Board on the themes of the Digital Framework (particularly digital skills and inclusion)</li> </ul>	Sarah Bowes
Employment and Skills Programmes	<ul style="list-style-type: none"> <li>Agree business plan and KPIs for 20/21</li> </ul>	Michelle Burton

**COMMITTEE DATE:** 19 May 2020 *Joint session with BIG?*

REPORT TITLE	NOTES	OFFICER RESPONSIBLE
Chair's Update		Verbal
Local Industrial Strategy	<ul style="list-style-type: none"><li>To provide an update on progress with the Local Industrial Strategy</li></ul>	Emma Longbottom
Future work, business environment and people	<ul style="list-style-type: none"><li>Thinkpiece on future work and automation</li></ul>	Lindsey Daniels, Peter Glover
A clearer skills offer to business	<ul style="list-style-type: none"><li>Develop proposals for what more can be done to engage more businesses with education and skills.</li></ul>	Lindsey Daniels, Michelle Burton
Economic Services Programmes	<ul style="list-style-type: none"><li>Brief report against business plan for Trade &amp; Investment, Business Support, Employment and Skills Programmes</li></ul>	David Shepherd Vincent McCabe Michelle Burton
Economic Reporting	<ul style="list-style-type: none"><li>Position statement on local economic performance</li></ul>	James Hopton

**COMMITTEE DATE:** General Future Meetings

REPORT TITLE	NOTES	OFFICER RESPONSIBLE
Improving education and achievement	<ul style="list-style-type: none"><li>Explore mechanisms for influencing compulsory education in the City Region in order to strengthen the local skills base and boost employability</li></ul>	Sonya Midgley, Peter Glover
Higher level skills, development, usage and retention	<ul style="list-style-type: none"><li>Explore ways in which local performance on high level skills can be improved as a key lever for enhanced productivity and growth</li></ul>	Sonya Midgley, Lindsey Daniels, Peter Glover

## Employment and Skills Panel (Forward Agenda Plan) 2019/20

Committee Date: 27 November 2019		
Report Title	NOTES	Officer Responsible for
Chair's Update		Verbal
Local Industrial Strategy	<ul style="list-style-type: none"> <li>To provide an update on progress with the Local Industrial Strategy</li> </ul>	Emma Longbottom
Policy insight – workplace skills and business leadership	<ul style="list-style-type: none"> <li>To consider the implications of the Future-Ready Skills Commission's findings for the City Region's local approach</li> </ul>	Sonya Midgley, Peter Glover
Delivery Agreements	<ul style="list-style-type: none"> <li>Update, following positions on LMI and role of technical education.</li> </ul>	Michelle Burton
Employment and Skills Programmes	<ul style="list-style-type: none"> <li>Update against business plan.</li> </ul>	Michelle Burton

COMMITTEE DATE: 25 February 2020		
REPORT TITLE	NOTES	OFFICER RESPONSIBLE
Chair's Update		Verbal
Local Industrial Strategy	<ul style="list-style-type: none"> <li>Update on progress with the Local Industrial Strategy (people foundation)</li> </ul>	Emma Longbottom
Labour market – business demand and inclusion	<ul style="list-style-type: none"> <li>Policy discussion on labour market supply/inclusion</li> <li>Any initial/emerging Brexit impacts.</li> </ul>	Peter Glover, Jonathan Skinner
Reviewing performance: employment and skills projects	<ul style="list-style-type: none"> <li>To review progress against high level ambitions set out in our Employment and Skills plans</li> </ul>	Michelle Burton, Peter Glover
Digital Framework	<ul style="list-style-type: none"> <li>Progress of the Digital Board on the themes of the Digital Framework (particularly digital skills and inclusion)</li> </ul>	Sarah Bowes
Employment and Skills Programmes	<ul style="list-style-type: none"> <li>Agree business plan and KPIs for 20/21</li> </ul>	Michelle Burton

**COMMITTEE DATE:** 19 May 2020 *Joint session with BIG?*

REPORT TITLE	NOTES	OFFICER RESPONSIBLE
Chair's Update		Verbal
Local Industrial Strategy	<ul style="list-style-type: none"><li>To provide an update on progress with the Local Industrial Strategy</li></ul>	Emma Longbottom
Future work, business environment and people	<ul style="list-style-type: none"><li>Thinkpiece on future work and automation</li></ul>	Lindsey Daniels, Peter Glover
A clearer skills offer to business	<ul style="list-style-type: none"><li>Develop proposals for what more can be done to engage more businesses with education and skills.</li></ul>	Lindsey Daniels, Michelle Burton
Economic Services Programmes	<ul style="list-style-type: none"><li>Brief report against business plan for Trade &amp; Investment, Business Support, Employment and Skills Programmes</li></ul>	David Shepherd Vincent McCabe Michelle Burton
Economic Reporting	<ul style="list-style-type: none"><li>Position statement on local economic performance</li></ul>	James Hopton

**COMMITTEE DATE:** General Future Meetings

REPORT TITLE	NOTES	OFFICER RESPONSIBLE
Improving education and achievement	<ul style="list-style-type: none"><li>Explore mechanisms for influencing compulsory education in the City Region in order to strengthen the local skills base and boost employability</li></ul>	Sonya Midgley, Peter Glover
Higher level skills, development, usage and retention	<ul style="list-style-type: none"><li>Explore ways in which local performance on high level skills can be improved as a key lever for enhanced productivity and growth</li></ul>	Sonya Midgley, Lindsey Daniels, Peter Glover