**Specification:**

**WISE Ability Services’ Building Better Opportunities (BBO) UCan Project:**

**Procurement of an Evaluation Partner**

**Date: 14/12/2018**

**Version 1.0**

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| **Organisation** | WISE Ability Services | |
| **Title of procurement** | WISE Ability Services’ Building Better Opportunities (BBO) UCan Project:  Procurement of an Evaluation Partner | |
| **Brief description of supply** | An evaluation of the UCan Project outcomes and impact in Dorset. | |
| **Estimated value of tender** | £86,000 | |
| **Estimated duration** | 4th February 2019 – 31st December 2019 | |
| **Name of contact for the purposes of this procurement exercise** | Laura Shepherd  Procurement Consultant  [Procurement@carleyconsult.co.uk](mailto:Procurement@carleyconsult.co.uk) | |
| **Name of contact for the delivery of the evaluation** | Philippa Plumpton  Head of Support Services  WISE Ability Services  [philippa.plumpton@wiseability.co.uk](mailto:philippa.plumpton@wiseability.co.uk) | |
| **Timeline/Key dates** | Response deadline | 18th January 2019, 5pm |
| Clarification deadline | 11th January 2019, 5pm |
| Shortlisted suppliers’ presentations | Thursday 24th January and Friday 25th January 2019 |
| Award notification | 31st January 2019 |
| Kick-off Meeting | w/c 4th February 2019 |
| Begin Evaluation (on a rolling basis) | w/c 11th February 2019 |
| Review Meetings | Monthly |
| Completion of Evaluation | 30th November 2019 |
| Produce draft report | 23rd November 2019 |
| Draft report sign off | 2nd December 2019 |
| Presentation of Evaluation Report | 16th December 2019 |
| Final Submission of the Evaluation Report and Accompanying Data Sent to WISE Ability Services | By 31st December 2019 |

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13. **Executive Summary**

WISE Ability Services are looking to procure a partner to evaluate the outcomes and progression delivered through the Building Better Opportunities UCan project in Dorset.

The key overarching outcomes of the evaluation are to:

* Understand the impact WISE Ability Services have had through the delivery of the BBO UCan Project;
* Understand the cost benefit analysis, cost per outcome, social value, Return on Investment (ROI) that the BBO UCan Project has had for the area of Dorset and individuals;
* Provide the Big Lottery Fund and the European Social Fund and other key stakeholders such as Dorset Local Enterprise Partnership and WISE Ability Services with a delivery evidence and a data set that can be applied to legacy opportunities.

1. **Overview of Building Better Opportunities**

Building Better Opportunities (BBO) is a programme aimed at tackling poverty and social exclusion by supporting the most disadvantaged people throughout England. BBO is funded by the European Social Fund in conjunction with the National Lottery through the Big Lottery Fund, with the Department of Work and Pensions acting as the Managing Authority.

Funding is distributed in alignment with 30 Local Enterprise Partnership (LEP) areas. Each LEP area have their own priorities as to how funding should be spent, but all have the same five key principles:

1. **Helping the most disadvantaged**

It is acknowledged that some individuals are more disadvantaged than others. The European Commission cites the following demographics as priority groups:

* People with parental or caring responsibilities;
* Women;
* People with health issues and disabilities;
* Black, Asian and Minority Ethnic groups (BAME);
* Refugees and recent migrants;
* People aged 50+ who are out of employment and/or have few or no qualifications;
* Low income, single earner households with children where one partner is not working;
* Disabled people;
* Those out of contact with the labour market;
* Ex-offenders and offenders;
* Homeless people;
* People with low or no skills.

1. **Tackling Social Exclusion**

Social exclusion profoundly affects people’s physical and mental health. This lack of wellbeing can have a significant impact on an individual’s confidence and motivation to engage fully with support services, preventing them from seizing opportunities to improve their personal circumstances.

1. **Focusing on each individual’s capabilities**

We expect projects to build on people’s strengths by developing their skills and talents to help them overcome the challenges they face. To achieve this, activities need to be focused on the needs of each individual through tailored packages of support that go far beyond simply providing advice. Getting people into work will be just one of the measures to track the success of the project. An individual’s progression, resulting from this targeted support, will be just as important.

1. **Leading to better coordinated services**

Organisations working together to provide a joined-up service will better benefit individuals with complex needs and barriers to work.

1. **Creating new opportunities for work**

Employer engagement will feature throughout the programme, creating opportunities for individuals to enter work and ensuring that they are able to progress to employment or self-employment.

1. **Overview of Dorset area needs**

Dorset faces unique challenges presented by the combination of rural, coastal, and urban areas within the region. Relatively low levels of unemployment and poverty mask pockets of need, with limited employment choices in rural areas presenting few chances for career and wage progression. Information from the Indices of Multiple Deprivation 2010 shows over 23,900 residents living in the 15 most income-deprived areas, whilst DWP benefits data for February 2013 shows that over 41,000 people of working age claim benefits including income support. People within Dorset often have specific and multiple needs, many of which are intertwined, difficult to address independently, and affect their ability to enter the job market, such as personal, attitudinal, social, familial, financial, health, or housing difficulties, such as:

* Mental/physical health conditions;
* Substance abuse issues;
* Early disengagement from education;
* Low levels of literacy and numeracy;
* Language issues;
* Poor or no work history;
* Homelessness;
* Gambling;
* Institutionalisation;
* High risk antisocial behaviours;
* Carer or parental responsibilities;
* Poverty and social isolation.

Priority groups within Dorset include those who are either unemployed or economically inactive, traditionally understood as those who are hardest to reach. These include, but are not limited to:

* Women and men;
* Children and Young People (Not in Education Employment or Training);
* Older People (50+);
* Those from Black, Asian, and Minority Ethnics backgrounds;
* Adults and young people where the family experiences inter-generational worklessness;
* People with disabilities (cognitive and physical);
* People with mental and physical health issues;
* People with addiction and problematic substance misuse issues;
* Homeless people or people on the brink of homelessness;
* Ex-offenders or people at risk of offending/re-offending;
* People with English as a second language;
* People facing rural isolation;
* People from the armed forces, recently repatriated from Germany;
* Lone parents and carers;
* Those with low levels of numeracy and literacy (and other functional skills deficits);
* Those with debt issues.

There is a requirement across Dorset to help people move towards work through flexible, tailored, vocational and non-vocational activities endowing customers with life skills, work ready skills, strategies and confidence to overcome their challenges and barriers, as a means for achieving positive outcomes in education, training, employment and personal and community wellbeing.

1. **Description of the UCan project**

WISE Ability Services’ BBO UCan project is an education, training and employment-focused project operating in Dorset with the aim of supporting disadvantaged adults and their families living in deprivation across the Dorset LEP area and facing multiple and complex barriers. The project offers significant holistic support to overcome personal challenges, gain and enhance skills, build resilience, complete training, gain sustainable employment, independence, and social inclusion.

UCan builds on WISE Ability Services’ collective experience in delivering Families Action Programme and similar projects which enables us to recognise how important it is that suitable holistic provision and support is available to help individual’s tackle the complex issues they need to overcome. The delivery model includes the following key features:

* Project Ambassadors (recruited from the communities they serve) provide outreach, ensuring every participant requiring support is identified and that they receive effective assistance through expert triage.
* A Personal Champion dedicated to working with an individual co-designs an action plan, setting out their pathway for the duration of their UCan journey. Personal Champions use our unique in-house developed Self-Sufficiency Model and Assessment Tool (SSM) to ensure participants benefit from an in-depth initial diagnostic assessment. This makes sure individuals are placed on a realistic employment route most suitable for them, based on their skills, experience and future aspirations.
* Partners provide specialist interventions to address physical, mental and social barriers and access to counselling. We provide personalised, flexible support with a diverse range of specialised interventions incorporating specialised partners to address multiple barriers. Specific interventions include WISE Choices, Weymouth Community Volunteers, Relate and Livability (Flourish).
* The Employer Engagement team work with employers and participants changing mind sets and getting the right job match.
* The ‘In Work Support’ team deliver the ‘Sticking in Work’, ‘Staying in Work’ and ‘Progressing in Work’ model.

Further detail about the WISE Choices programme can be found below:

WISE Choices is a specialist mental health intervention programme delivered to participants who are enrolled on the UCan project. This model of support responds to the needs of people aged 25 and older with persistent mental health challenges. The focus of the team delivering this project is to enhance the lives of participants who have mental health care needs.

The service aims to:

* Establish a model of individual practical support to increase people’s resilience, mental health and wellbeing across five support stages
* Assist participants to better manage their daily routine and activities
* Use fun activities in order to improve mental processes such as concentration, memory, attention and planning
* Educate participants in skills and strategies for the development and maintenance of positive mental health and resilience.
* Involve participants and their families, carers and supporters in service planning and delivery wherever possible
* Support and complement partners and mental health services within the Dorset community

1. **Aims and required outcomes of the evaluation**

The evaluation is aimed to provide a comprehensive assessment of the successes and development challenges of the UCan project to date. A substantive budget is available for this evaluation and, as such, the expectation is that the evaluation will provide a comprehensive and in-depth level of assessment.

To this end, the evaluation will, as a minimum, need to report upon and provide understanding of:

* The success of the UCan project in terms of achieving the originally specified outcomes, outputs and targets;
* The impact WISE Ability Services have had through the delivery of the BBO UCan Project on the individuals who participated;
* The impact and success of specific interventions accessed through UCan including WISE Choices, Weymouth Community Volunteers, Relate and Livability (Flourish);
* The cost benefit analysis, cost per outcome, social value, and return on investment provided by the UCan Project;
* The project’s overall impact across Dorset, including its effect on the people, how it is embedded in the local community;
* The project’s resilience and potential for realising a sustainable legacy in the area of Dorset;
* Key successes of the UCan Project, including those over and above the specified objectives;
* Activities or areas of the UCan Project that haven’t achieved expected outcomes, and the reasons for this;
* The wider benefit of the UCan Project, for individuals and the communities in addition to its original aims and objectives;
* The impact of the UCan Project for participants in comparison to those who have not been able to access the service;
* The impact of the UCan Project for participants in comparison to those who are engaged with other programmes such as Individual placement and Support (IPS) programmes across Dorset;
* The comparative impact of UCan when compared to similar BBO projects, and similar projects in the Dorset area, by way of a benchmarking comparison;
* Specific recommendations as to how the project could be modified and/or scaled up to a regional, and/or national approach;
* A specific evaluation of WISE Choices, assessing its benefits, any notable weaknesses and recommendations for enhancement.

The evaluation should also assess the impact of the change in scope of the BBO UCan Project following grant award, whereby there was a significant reduction in the number of specialist intervention partners (from 21 down to 4) taking part in the project.

The provider must provide and examine statistics and data from throughout the duration of the project, providing WISE Ability Services with strong information that can be built into future contracts and inform the delivery of similar projects.

Specific targets that the project aimed to meet included:

* 254 participants will move into education and/or training;
* 254 participants will move into employment or self-employment;
* The following participants must be engaged in activities to increase work readiness:
  + 748 men
  + 748 women
  + 748 people who were unemployed
  + 748 people who were economically inactive; 246 people aged 50+
  + 321 people with a disability
  + 62 people from Black, Asian, or Minority Ethnic backgrounds
* 178 participants must take part in a specific digital activity;
* 17% of participants must move into education or training;
* 14% of participants must move into employment or self-employment;
* 72% of participants must move onto job-search on leaving;
* Improved health and wellbeing of 70% of engaged, eligible participants;
* Contribution to employers’ change of attitudes toward recruiting disadvantaged and underrepresented participants;
* Increased individual and community activity (or 70% of participants completing education courses, and;
* At least five participants becoming project ambassadors and/or peer mentors.

As a feature of the evaluation, the evaluation partner will also be specifically required to assess “WISE Choices”, an innovative mental health intervention which is offered as a specific component of UCan. WISE Choices applies methods and activities which aim to enhance the cognitive ability and cognitive vitality of participants with mental health issues. WISE Choices helps participants build key skills for work such as concentration, interaction with new people, problem solving and mental/physical health management, as well assisting participants to develop suitable work-orientation and employment opportunities. The provider should provide: an overview of the characteristics of WISE Choices; an assessment of its specific benefit to UCan participants; case study examples of notable success stories; any identified weaknesses or shortcomings within the WISE Choices approach, and; further recommendations as to how WISE Choices could be further enhanced.

1. **Project Management & Progress Reporting**

Bidders are asked to provide a detailed delivery plan, explaining their proposed methodology for the delivery of the UCan project evaluation, with key consideration given to how they will maximise the value of the contract and add value of the evaluation at each stage. This should be included in their bid as requested in the applicant response document.

In their delivery plan, the evaluation partner is required to present a design plan for the evaluation that incorporates the development for content of evaluation activity (surveys, one to one script, case study etc.) Bidders must ensure in their proposed timescales they allow a minimum of 5 working days for all surveys and evaluations questions to be signed off by WISE Ability Services once produced. The design plan must include the use of both primary and secondary research.

The evaluation partner will be required to assign a named Project Manager for the day to day contact regarding the UCan project evaluation who will meet with WISE Ability Services monthly to provide progress updates. Monthly meetings will ordinarily be by phone/skype, with a more formal face-to-face review each quarter. Quarterly meetings will take place at a WISE Ability Services location in Dorset, unless separately agreed at an alternate venue. Progress updates should take the form of a written report that highlights progress against the key performance indicators dictated in the specification, as well as proposed activities and actions for the month/quarter ahead. Any deviation from expected progress should be reported immediately to WISE Ability Services, with accompanying actions to be taken to on track progress.

1. **Primary Research Requirements**

The evaluation partner will be expected to engage with participants directly and through access to their management information and personal data. We expect a level of primary research to be carried out with a substantive sample of participants to capture their feedback and perceptions of their experience of the UCan project.

The evaluation will be set-out and introduced at our initial meetings with participants, with consent forms signed and stored accordingly. Where participants consent, this will include providing permission for their contact details to be shared with the evaluation partner. WISE Ability Services is inviting all UCan participants to contribute to the evaluation of the project. A draft Evaluation Purpose Statement is enclosed in Appendix 1, this will be provided to all participants to request their involvement in the evaluation. Where participants have opted in to the evaluation, and their details have been shared with the provider, it will be the responsibility of the provider to engage them in the evaluation as required.

Appendix 2; BBO UCan Stakeholder Feedback outlines the minimum expectation of the evaluation partner in their engagement with UCan participants, delivery partners, key stakeholders, WISE Ability Services staff and employers, and the expected type of engagement. The document provided is not an exhaustive list and it will be confirmed upon contract award. The evaluation model must include the following minimum levels of primary research with individual participants, delivery partners, key stakeholders and employers:

* A one-to-one survey with UCan participants, delivery partners, key stakeholders, WISE Ability Services staff and employers, carried out face-to-face in person, online or by phone;
* A series focus groups with participants, lasting for at least 30 minutes, with each group involving a minimum of 8 participants;
* A detailed / confidential one-to-one interview with UCan participants, delivery partners, WISE Ability Services staff and key stakeholders and employers carried out face-to-face;
* Detailed individual case studies with UCan participants, delivery partners, key stakeholders, WISE Ability Service staff and employers, carried out face-to-face, to be used for marketing, promotion and sharing good news stories;
* An additional on-line / digital survey aiming to capture feedback and contributions from as many other participants as possible.

In all cases the sample participant group selected must be representative of the wider UCan cohort e.g. in terms of age, gender, location of residency, etc. This sample will ideally include a mix of different participants at different stages in their participant journey, including those who have completed / graduated from the programme. Bidders are encouraged to consider innovative solutions to engage participants in the evaluation.

Where possible, the evaluation partner will attempt to engaged with as many individual UCan participants, delivery partners, key stakeholders and employers, however it is acknowledged that due to the voluntary nature of participation individuals may contribute to different elements of the primary research e.g. a UCan participant may attend a focus group and have a one-to-one interview.

The purpose of this primary research with participants is to gauge, as a minimum:

* Their attitudes towards the UCan project;
* The extent to which they perceive the project met their employment needs;
* The suitability of available premises and resources;
* The suitability and skills of delivery staff;
* Their thoughts as to how the programme can be further improved.

The provider must devise an appropriate set of questions and script to be applied for primary research with participants, to be approved in advance by WISE Ability Services. A full list of suggested question themes is provided at Appendix 3. The provider must also have the means to appropriately record and log all responses given, ensuring that these are verifiable.

Please note, all staff responsible for carrying out face-to-face interviews and wider engagement with participants must have current DBS checks.

This component of the research is geared to ascertain the perspectives of key stakeholders towards the UCan project. WISE Ability Services will provide support to broker introductions to these stakeholders wherever possible.

A robust and thorough collation of data gathered in the UCan Project evaluation must be provided to WISE Ability Services alongside the final evaluation report to evidence data gathering and activity that has taken place. This must be available for WISE Ability Services to view at any point throughout the evaluation.

Evidence validation should be undertaken throughout the delivery of the UCan Project evaluation, providing regular results and information updates to WISE Ability Services in monthly reviews and identifying outlying results or information that may be queried. This may involve, for example, providing copies of survey results, and notes from interviews and focus groups. The provider will be expected to work with WISE Ability Services to define a means to ensure that respondents are bona-fide UCan participants, and that all evaluation data is appropriately clean and error free.

WISE Ability Services will reasonably endeavour to facilitate on-site access for the provider to carry out focus groups and interviews with UCan participants and key stakeholders at our premises and sites in Dorset, albeit please note that such access is not guaranteed.

1. **Literature Review & Secondary Research**

The provider is expected to undertake an appropriate literature review to inform the evaluation. The literature review should help inform the success of UCan to date in terms of fulfilling its originally specified objectives, as well as assessing the wider impact of UCan on wider policy strategies and economic indicators. As a minimum, this will include a review of:

* The Dorset European Structural and Investment Funds Strategy 2014-2020 (updated February 2016);
* The Big Lottery’s original specification for the European Social Fund Building Better Opportunities opportunity in Dorset;
* WISE Ability Services tendered response to this opportunity, detailing how the Big Lottery’s specification would be fulfilled;
* Management information reports submitted from WISE Ability to the Big Lottery / DWP outlining the performance of the UCan project;
* Evaluations of other BBO projects, elsewhere in the UK, where available in the public domain, for the purposes of comparatively benchmarking the performance and successes of UCan\*;
* Any other relevant labour market reports and datasets.

WISE Ability Services will provide appropriate extracts from the BBO specification and its tendered response to this for the purpose of evaluation. The provider will be provided with a restricted log-in to Cognisoft’s YETI case management system, whereby we will ‘refer’ consenting participants redacted data to the evaluation partner, ensuring provider access in alignment with relevant data protection legislation. We will continue to work with Cognisoft and the evaluation partner to provide access which enables fulfilment of the required services.

\* It is expected that the evaluation partner undertakes a benchmarking exercise to provide a baseline for the UCan evaluation project. The benchmarking exercise may include assessing WISE Ability Services current reported performance data to the Big Lottery, benchmarking information against other BBO funded projects nationally, using best practice from previous delivery, as well as other proposed methods.

1. **Final Report**

The provider is expected to provide a comprehensive technical report to WISE Ability Services at the conclusion of the evaluation; Appendix 4 provides the suggested Final Report Structure. As a minimum, the final reporting process should include:

* A two-page plain language summary suitable for community audiences (e-copy PDF);
* A larger summary report with perspectives for practitioners (e-copy PDF);
* A comprehensive technical report detailing the research methodology, analysis, findings and recommendations, suitable to academics and policy makers. (e-copy PDF);
* An Interim report to WISE Ability Services for review and feedback 2 weeks before final report and present a synopsis of the interim report to WISE Ability Services;
* Final report to be presented to WISE Ability Services.

The evaluation will involve the totality of the project reporting on the effectiveness of the project, providing a coherent overview of the impact of the project, providing an understanding of the processes and mechanisms by which relevant outcomes were or were not achieved, as well as clearly identifying key lessons from the projects staff and management.

Whilst acknowledging the academic nature of services required for an effective evaluation, WISE Ability Services are keen to ensure the final report is presented in a way that is engaging and fit for purpose. The evaluation is designed to be used by practitioners, funding bodies and key stakeholders, maximising the use of pictures and infographics wherever possible. Therefore, the final produced report should include a focus on case studies and good news stories from participants, employers, community groups and other key UCan project stakeholders.

A full draft of the technical report should be provided to WISE Ability Services for comment, review and feedback by 25th November 2019 at the latest. Any such feedback should then be taken account of in the final submission which must be submitted for approval, sign off and presentation by the 16th, with the final report and accompanying data submitted by the 31st December 2019. The provider is also required to deliver a short face-to-face presentation and Q&A session, to WISE Ability Services managers and key stakeholders, setting out the key messages from the evaluation, to be delivered on the 16th December 2019 at a WISE Ability Services location in Dorset. WISE Ability Services will provide copies of the Summative Evaluation to managing authority DWP, European Social Fund, Big Lottery, partners, and community key stakeholders such as Dorset LEP, Dorset Chamber of Commerce and Industry, and Dorset County Councils and district councils. Community will be able to access reports through WISE Ability Services on our website.

1. **Payment Model and Funding**

To enable the viability of services offered to be evaluated, respondents must include an itemised price offer for the entire contract within a maximum budget of £86,000. Bidders must offer a Fixed Price for delivering the full scope of service within this budget, inclusive of VAT, all associated fees, costs and expenses. WISE Ability Services will only pay up to the amount specified in the quote for the project.

In accordance with the Agreement for Services, payment terms will be negotiated, which will include a significant proportion which will be paid upon the satisfactory completion of the evaluation. Indicatively, we expect that payment schedule to reflect the following payment triggers as dictated by the Big Lottery:

|  |  |  |  |
| --- | --- | --- | --- |
| **Total payment** | **£ 86,000** | **Payment Date:** | **In the following instalments:** |
| First Installment | £ 43,000 | February 2019 | On signing the Agreement of Services. |
| Second Installment | £ 21,500 | July 2019 | Made upon acceptance by WISE Ability Services that the Services have been completed as required under this Agreement, in accordance with the Quotation, Delivery Plan, Milestones and Budget, to be agreed with WISE Ability Services. |
| Final Payment | £ 21,500 | December 2019 | Made upon acceptance by WISE Ability Services that the Services have been completed as required under this Agreement, in accordance with the Quotation, Delivery Plan, Milestones and Budget, to be agreed with WISE Ability Services. |

WISE Ability Services are subject to systematic claw back from the Managing Authority European Social Fund and Big Lottery Fund, if regulations are not followed. Whilst WISE Ability Services will work closely with the contractor to avoid this outcome, we reserve the right to claw back funds if necessary. Please note, for example, that WISE Ability Services reserves the right to withhold a proportionate level of funding if the provider should fail to engage the minimum required numbers of participants and employers in primary research activity.

The price quoted must ensure it complies with the BBO Guide to delivering European funding, Section 8: Costs and Expenditure, enclosed within the bidding documentation.

1. **Management information and data security**

Providers must have Cyber Essentials and align to both the Data Protection Act 1998 and the General Data Protection Regulation. By submitting a tender, you are confirming that you are compliant with the requirements of the General Data Protection Regulation and Data Protection Act 2018 (as may be amended from time to time) in so far as they apply to this contract.

**Appendix 1: Wise Ability Services Ucan Project Evaluation – Draft Evaluation Purpose Statement**

**WISE Ability Services Ltd**

**UCan Project Evaluation (2019)**

**Managed by:** Philippa Plumpton

Head of Support Services

WISE Ability Services

WISE Ability Services and are always looking for ways to improve our service to participants. As part of our ongoing continuous improvement strategy for UCan WISE Ability Services seeks to evaluate the impact UCan may have had on UCan participants.

WISE Ability Services is inviting all UCan participants to contribute to a evaluation of the project.

The evaluation will try and understand how you feel about UCan, and whether UCan has contributed to your progression towards employment and involvement in activities that positively impact on your wellbeing. The evaluation findings will be used to help promote and influence future support for participants and employment opportunities.

As a UCan participant you are invited to volunteer information such as whether UCan has helped improve your skills and capabilities, helped improve your confidence, your relationships, and helped you gain employment.

The evaluation will start around 5th February 2018 and will involve completing a short questionnaire. You may wish to use an advocate, maybe a friend or relative, to assist complete the questionnaire.

The distribution of surveys will be conducted by <named evaluation partner>

The evaluation is part funded by the European Social Fund in conjunction with the National Lottery through the Big Lottery Fund.

WISE Ability Services is recording the information supplied by you in the questionnaire in a database and assessing how and if UCan has helped.

WISE Ability Services may also wish to interview you one-on-one about UCan and ask you to tell them how UCan has helped. In this instance they will write down your answers, so they form part of the evaluation at a later date.

WISE Ability Services will use the information to write a specific report for WISE Ability Services. During the evaluation, we will not use any participant names to identify people who participate.

WISE Ability Services will keep the notes of the interviews in a locked filing cabinet at their office located at Tamworth, in accordance with the requirements of European Social Fund contract. After that they will be destroyed.

If you agree, WISE Ability Services propose to give a copy all of the completed questionnaires and notes to <named evaluation partner> for evaluation. Please note that:

* The General Data Protection Regulations says that other people can only have access to personal information which identifies you if you agree that they can. Under no circumstances will WISE Ability Service divulge your circumstances to other WISE Ability Services staff and will preserve and safeguard the secrecy of confidential information.
* As a UCan participant engaged by WISE Ability Services regarding the UCan evaluation, you will be required to sign an evaluation agreement acknowledging your voluntary participation in the study.

If you have any queries or concerns, please discuss these with the manager of this study, Philippa Plumpton at Philippa.Plumpton@wiseability.co.uk.

**Appendix 2: BBO UCan Stakeholder Engagement Matrix**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Stakeholder  (numbers stated are minimums) | Organisation | The role they have in BBO UCan | Surveys | Focus Groups | 1 to 1 Interviews | Case Study |
| UCan Governance, oversight and Management | WISE Ability Services  UCan Staff | CEO Oversight | 1 |  | 1 | 1 |
| UCan Governance, oversight and Management | WISE Ability Services  UCan Staff | Quality Compliance | 1 |  | 1 |  |
| UCan Governance, oversight and Management | WISE Ability Services  UCan Staff | Operations | 1 |  | 1 |  |
| End to End Delivery Partner | Livability (Flourish)  UCan Staff | Operations | 1 |  | 1 | 1 |
| Specialist Intervention Partners/Services | Weymouth Community Volunteers  UCan Staff | Delivery | 1 |  | 1 | 1 |
| Specialist Intervention Partners/Services | Relate  UCan Staff | Delivery | 1 |  | 1 | 1 |
| Specialist Intervention Partners/Services | Livability (Flourish)  UCan Staff | Delivery | 1 |  | 1 | 1 |
| Opted Out Specialist Intervention Partners/Services | TBA  Staff | Delivery | 1 |  | 1 | 1 |
| Opted Out Specialist Intervention Partners/Services | TBA  Staff | Delivery | 1 |  | 1 | 1 |
| UCAN Programme Steering Group | WISE Ability Services  UCan Staff | Continuous Quality Improvement Sharing Best Practice | 1 |  | 1 |  |
| UCan Participants Work Group | WISE Ability Services  UCan Participants | Co design - development | 1 |  | 1 |  |
| End to End Delivery Partner | Livability (Flourish)  UCan Staff | Delivery | 1 |  | 1 |  |
| End to End Delivery Partner | Livability (Flourish)  UCan Participants | Work Towards achieving their overall goals | 80 | 1 | 10 | 2 |
| End to End Delivery Partner | Livability (Flourish)  UCan Participants | Provide Opportunities, Recruit Suitable Participants | 20 |  | 5 | 1 |
| Strategic - particularly LEP and LA relationships | ESIF Board  UCan Stakeholder Staff | Help Keep UCan aligned to LEP priorities facilitate forum for sharing best practice | 1 |  | 1 |  |
| Strategic - particularly LEP and LA relationships | DWP David MacArthur  UCan Stakeholder Staff | Help Keep UCan aligned to LEP priorities facilitate forum for sharing best practice | 1 |  | 1 |  |
| Strategic - particularly LEP and Local Authority relationships | Bournemouth University  UCan Stakeholder Staff | Impact and Reputational Oversight | 1 |  | 1 |  |
| Referral Organisations | CJP Advisors  UCan Stakeholder Staff | Referral Pathways | 10 |  | 1 | 1 |
| UCan Participants (representative of Priority Groups) | Board representation  UCan Participants | Work Towards achieving their overall goals at various stages: during delivery; on completion; employed; and, other successful outcomes. | 420 | 2 | 20 | 4 |
| Employers | WISE Ability Services UCan Stakeholder Staff | Provide Opportunities, Recruit Suitable Participants | 100 |  | 20 | 2 |
| Delivery Staff | WISE Ability Services UCan Staff | Delivery | 5 |  | 5 |  |
| Delivery Staff | Livability  UCan Staff | Delivery | 4 |  | 4 |  |
| Local Member (MP) | UCan Stakeholder Staff | Impact and Reputational Oversight |  |  | 1 |  |
| WISE Choices | UCan Participants | Delivery | 4 |  | 4 | 1 |
|  |  |  |  |  |  |  |
|  |  |  | 658 | 3 | 85 | 18 |

**Appendix 3: Outline of Key Research Areas and Evaluation Scope**

**Sample evaluation questions to be included in the evaluation of the UCan Project:**

**Project design, appropriateness and relevance:**

* Does UCan address a demonstrable need?
* Evidence and nature of unemployment and disadvantage in Dorset UK
* Extent that UCan responds to participant’s needs, local needs, operating environment and broader stakeholder needs
* Extent that UCan aligns to Dorset LEP, BBO and Government Priorities
* Extent that UCan promotes awareness of Big Lottery Fund (BLF) Building Better Opportunities (BBO) project’s support for unemployed and economically inactive individuals in the Dorset Local Enterprise Partnership area
* Evidence of best practice reflected in UCan design and activities

**Efficiency:**

* To what extent is UCan better placed to meet the support needs of economically inactive and unemployed disadvantaged people in Dorset?
* Summary of total barriers participants faced using WISE Ability Services Self Sufficiency Data as a source of information to measure this
* Is the relationship between inputs and results achieved are reasonable and justifiable?
* To what extent does UCan reduce government costs on other support services?
* To what extent are stakeholders satisfied with UCan, its implementation, delivery and achievements?
* To what extent did the UCan service complement or duplicate existing Local Authority, DWP, European Social Fund and Education Skills Funding Agency services in Dorset?
* To what extent do UCan services complement and coordinate with other services across Dorset?
* To what extent has collaboration with other services enabled the achievement of project outcomes?
* What strategies have been identified to reduce the negative impact of ceasing the project when funding ends in December, 2019?

**Effectiveness:**

* To what extent are participants being reached and engaged as intended?
* Whether the project reached those intended both in real numbers and proportionately
* Whether changes in participants circumstances can be attributed to UCan
* Design components that have made meaningful impact on participants involvement in co-design and delivery of UCan
* Evidence that UCan services are flexible and customised (e.g., satisfaction surveys and stakeholder interviews)
* Number of participants who received service, and evidence that UCan led to their increased employability
* The number of employment, training and education outcomes achieved
* To what extent did UCan respond to local and regional labour market needs?
* Evidence that job placements are aligned to labour market demand
* Evidence of additional outcomes, retention rates, stakeholder perceptions (e.g., employers)
* Number of relationships developed with employers and pipeline or placement options created
* Proportion of employment placements in occupational skill shortage areas or high projected industry growth areas
* To what extent did the project achieve its intended outcomes, e.g. training, education, employment for participants?
* Evidence that UCan participants have a higher likelihood of being employed than non UCan participants who are not involved in other similar projects
* What elements of the project are distinct compared to other employment services projects?
* Confidence of employers to recruit through UCan
* Repeat use of UCan by employers
* Whether employer attitudes towards recruitment of UCan participants changed as a result of information, service and support UCan provided to employers

**Impact:**

• What are the key results?

• Evidence that the project led to the results

• How has UCan made a difference for disadvantaged, economically inactive, and unemployed?

• Which participant groups have benefited most from the project in what circumstances and why?

• To what extent have participants who achieved successful employment outcomes experienced greater economic and social inclusion?

• European Social Fund Cross Cutting themes of social and environmental impact?

• What would be the impacts of ceasing or continuing the project?

• To what extent does the project represent value for money?

• To what extent can future models for employment and support to the long term unemployed and economically inactive be informed through UCan?

**Appendix 4: Suggested Final Report Structure**

A proposed structure is outlined below with suggested content.

* Executive Summary:
  + The background and context of the evaluation.
* Literature Review/Establishing the need for the UCan project:
  + A structural analysis of the gap between present services and population needs;
  + Employment Barriers for Unemployed economically inactive – the experience of economic and social exclusion;
  + Synopsis of current service responses in Dorset.
* A summary of the key commitments made by WISE Ability Services, including:
  + UCan plan;
  + BBO Agenda;
  + Policy context.
* Designing the UCan Project:
  + Stakeholder co design;
  + BBO Funding;
  + Target groups;
  + UCan Components;
  + UCan implementation - A high level assessment of what has been implemented against these plans to illustrate promised targets, outcomes and extent of implementation.
* Evaluation methodology, including:
  + How the primary research was undertaken (when and where activity took place);
  + Numbers of participants or other contributors who took part.
* Quantitative and Qualitative Results:
  + Qualitative study of UCan participants, the findings of the primary research undertaken, employers key stakeholders – Case studies - stories of hope, promise and progress from participants, community, employers, providers, staff working in the UCan project and broader service system;
  + UCan Project service uptake, participant profiles (demographics), barriers to employment, performance analysis of the UCan Project (activity against targets);
  + Project targets, project outcomes, evaluation of cost benefits analysis; analysis of the wider social and economic impact of UCan, establishing whether the project justified the investment made in it.
  + Stakeholder views.
  + Staff – their challenges.
  + Limitation and methodological challenges.
  + Comparing UCan to other BBO projects and models of practice used.
  + Elements of the UCan project which worked well. Highlight the exemplary service areas that require scaling to meet population needs.
* Key recommendations arising from the evaluation.
  + Any challenges faced and addressed in completing the evaluation.
  + Elements recommended for review and where efforts need to focus in the short, medium and longer term.
  + Replication and scaling options.
* References.