

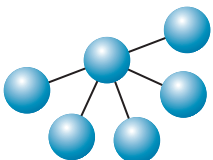
**Evaluation of
Learning Challenge Fund
Final Mini Evaluation Report**

Mini Evaluation Report

The TrainLink Project



Llywodraeth Cynulliad Cymru
Welsh Assembly Government



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SHARED INTELLIGENCE 1 Fitzroy Square, London, W1T 5HE

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1. INTRODUCTION

1.1. The TrainLink Project - Trac (Antur Teifi Cyf)

Background and aims

- 1.1.1. The *TrainLink Skills and Training Survey* aimed to build a partnership of training providers that would share information about their business clients, to ensure that employers and trainees could access suitable training opportunities.
- 1.1.2. The project was originally conceived by a staff member from Jobforce Wales, based on feedback from employers. Historically, training providers would build relationships with individual employers, and work with them to fill training vacancies. However, the training provider was not always able to deliver all the training an employer might need. Employers would then have to search for another training provider, which could be time consuming and mean that needs might not be met. Also, since there was no formal co-ordination between training providers, employers could find they were being visited by field officers from several different providers, which again was time-consuming. Employers had little information that would help them work out which provider to choose.
- 1.1.3. Through the TrainLink project, field officers would ask the employers they visited to fill in a training survey, to identify vacancies, recruitment difficulties, future training needs and skills shortages within the organisation. The data was compiled centrally by the TrainLink team. If there was an immediate training need that the training provider doing the survey could not meet, the TrainLink team would refer the employer to another provider. The data would be also used to build up a picture of employers' needs that could be used by training providers and other organisations in their planning processes.

Project structure

- 1.1.4. The TrainLink project was managed by Trac, who employed a TrainLink coordinator and a survey officer to staff the project. The funding for these posts was provided through the Learning Challenge Fund. Trac is one of the departments of Antur Teifi, a third sector company that aims to promote economic and social development, based in Carmarthenshire. Antur Teifi has several trading names for its different departments. Carmarthenshire Enterprises, another arm of Antur Teifi, was also involved in the project.
- 1.1.5. TrainLink was a partnership of five training providers, Jobcentre Plus and Careers Wales West. The training providers were:
 - Antur Teifi (through Trac and Carmarthenshire Enterprises);
 - Carmarthenshire Training and Technology Centre;
 - Coleg Sir Gar;
 - Llanelli Rural Council (ETMA); and
 - Jobforce Wales.

- 1.1.6. All the training providers carried out surveys with employers they worked with. Jobcentre Plus and Careers Wales West were involved mainly in an advisory capacity, although Jobcentre Plus also completed some surveys and the TrainLink survey officer was seconded from Jobcentre Plus.

LCF funding

- 1.1.7. A first phase of the TrainLink project was funded by ELWa using IDP funding. Building on this pilot, the project then submitted a bid to the Learning Challenge Fund to fund a second stage of development. £56,000 of LCF funding was approved for the project to cover staffing, equipment and overheads for one year. The project eventually only claimed £43,000 as original costs had been overestimated.
- 1.1.8. Partners also jointly contributed around £10,000 'in kind' funding, comprised mainly of field officers' time spent on the project.

Project objectives

- 1.1.9. The objectives of the project, as stated in its original bid to ELWa, were to:
- enable employers in Carmarthenshire to locate and access suitable training in accordance with their needs;
 - network and create partnership amongst training providers in Carmarthenshire with a view to cooperating to fulfil the identified training needs;
 - maximise the benefits and stimulate the uptake of training by employers and individuals in Carmarthenshire;
 - optimise the utilisation of training resources by employers in Carmarthenshire;
 - set up a web-based network of training providers;
 - increase the number of individuals participating in government funded training programmes;
 - develop a mechanism and partnership by which specific employer-based training needs are identified to providers;
 - pilot an application that can be replicated in other areas;
 - research and design future training projects for the area in conjunction with the CCETs and local strategies;
 - increase the number of jobs filled by local employers;
 - gather timely data on employer training and employment needs; and
 - use the information to create where possible flexibility in training provision to meet the changing needs of employers' skills requirements to become more competitive in world markets.

1.2. LCF Evaluation Methodology

- 1.2.1. Shared Intelligence has been commissioned by ELWa to evaluate the Learning Challenge Fund on an ongoing basis. This comprises a mini evaluation of each of the LCF projects, as well as an assessment of the LCF's progress as a scheme.

1.2.2. The LCF evaluation programme began in 2003. The first stage of the evaluation reviewed the development and process of setting up and administering the Learning Challenge Fund. Project mini evaluations began in 2004. Most projects commenced activities in this year, although some were contracted earlier and, as they were short-term projects, had been completed by 2004. The TrainLink project was one of those that was completed by the time the external project evaluation commenced.

1.2.3. This mini-evaluation is based on:

- an extended interview with the TrainLink Co-ordinator, based at Trac;
- telephone interviews with the ELWa contract manager and two TrainLink partners; and
- review of project documentation including original bid to ELWa; and
- the project's own internal evaluation report, which was submitted to ELWa in August 2003.

1.2.4. The project conducted its own internal evaluation, as per its contract with ELWa, which included feedback from TrainLink partners and some employers. Because this had already been undertaken, Shared Intelligence agreed with the project and ELWa that further beneficiary research would not be carried out. The evaluators did not want to raise expectations among employers that the project would be continued, or 'over-consult' them, since they had already contributed to one evaluation.

2. PROJECT ACTIVITIES AND OUTPUTS

2.1. Project activities

- 2.1.1. A core element of the TrainLink project was to administer a training needs survey of employers. This aimed to obtain up-to-date information on training needs of employers in the area, and also to provide relevant information should employers require referral to other training providers. The survey questionnaire was designed by the TrainLink partnership, and administered by field officers from each of the five training providers. Each field officer was set a target of 24 completed survey questionnaires and it was expected that field officers would administer the surveys as part of their regular visits to employers. A survey officer employed by the project also administered survey questionnaires, to supplement those completed by the field officers. Data was then input into a central database, maintained by the TrainLink project team at Trac.
- 2.1.2. Through the survey, the TrainLink team was able to identify gaps in provision in Carmarthenshire, and to refer employers to training providers who could best meet their needs. Employers were only referred where the training provider who carried out the survey could not meet their needs.
- 2.1.3. The project was guided by an operating group comprised of representatives of the field officers. Managers from each of the partner organisations also met monthly to review the project.

2.2. Project progress

- 2.2.1. The project began in January 2003 and finished in July 2003. Largely, the project progressed according to plan, and most outputs targets were overachieved.
- 2.2.2. Nevertheless, the project manager described it as “difficult to implement” and the project did come up against a few challenges in delivery. For example, not all field officers were able to complete their target numbers of questionnaires. One provider, in particular, could not deliver the number of survey questionnaires that had been promised and this provider’s target was reduced in agreement with ELWa. Part of the problem was that field officers did not always accept that administering the survey should be part of their role, and preferred that the TrainLink team did this. It seems as if, although management within each of the training providers were strongly behind the concept of partnership working, front line staff still had some concerns about sharing data and about the increased workload brought about through the project.
- 2.2.3. There were also some questions raised over the consistency and quality of information gathered through the survey. In order to find out detailed information about training needs within an organisation, field officers were advised to administer the survey with a senior decision maker within the company. One consultee interviewed for the external evaluation felt that it was likely that some field officers instead asked their usual contact within the company to fill in the survey, which may not have provided such good data. However, this is only one view and it is not possible to tell whether this had a large impact on the quality

of data gathered or not. One way of getting around this difficulty was to employ the survey officer who could gather higher quality data.

- 2.2.4. Another issue was that, when providers were slow to hand over lists of businesses that they were surveying, this resulted in some businesses being surveyed by more than one training provider. Only one survey could count towards the target, so this meant that both field officers' and businesses' time was wasted when this happened. Additionally, gaining agreement from all partners to the format for storing client information centrally was a "lengthy process", as providers regarded employer contact details as business sensitive information.
- 2.2.5. The TrainLink project manager also noted that representation on the Steering Group was not consistent by all partners, which affected the quality of information provided to the Survey Officer on outcomes of referrals and so on.
- 2.2.6. Another point to note about partnership working was that, while each of the providers was committed to sharing information, there were nevertheless sensitivities around whether partners would 'poach' each other's clients. Consultees for the external evaluation felt that field officers were particularly likely to be concerned about this. This was one of the key problems faced by the TrainLink partnership and had been recognised at the start of the project as such. However, two consultees interviewed by Shared Intelligence questioned how sensitively this had been handled by the TrainLink team.
- 2.2.7. This was a barrier to delivery of the project as it was one of the reasons why not all field officers completed their target numbers of questionnaires. It also highlights an inherent tension in the project as, while providers may have ideals of partnership, the way their targets are set up means they are nevertheless in competition with each other. This can sometimes get in the way of providing the best service to clients. This is the problem that the TrainLink project was trying to overcome, but it did not achieve this entirely successfully. As one consultee pointed out, there was still "protectionism" by the end of the project and a view among some that "that's 'my' company".

2.3. Project outputs

Target and achieved outputs

- 2.3.1. The table below is taken from the project's internal evaluation report. The table shows the main targets and achieved outputs for the project.
- 2.3.2. The project was successful in achieving the majority of its target outputs. As mentioned above, the target for businesses surveyed was reduced as it was initially over-ambitious and providers had trouble meeting it. This reduced target was agreed with ELWa.

TrainLink project: target and actual outputs		
	Target	Achieved
Businesses surveyed	936, reduced to 876	866
Referrals from surveying partner to other partners	192	428 referrals to all partners 331 accountable
National traineeships and modern apprenticeships filled (including actual and intended places)	130	143 placements identified 380 requests for further information
Other training places e.g. WBLA, New Deal and NVQ	227	301 training placements identified 505 requests for further information 87 other types of training
Jobs filled	130	479 vacancies identified 45 filled 116 vacancies found by TrainLink
Business support leads generated (other than training)	43	36 ISO 30 IiP

Additionality of outputs

- 2.3.3. Although no data on referrals between providers before the TrainLink project exists, there are several indicators that suggest outputs from the TrainLink project were generally additional to what would have happened anyway.
- 2.3.4. The project resulted in a large number of referrals between training providers. It can be assumed that these would have not happened in the absence of the project, as no formal system for referrals was in place before TrainLink. Of the 428 referrals, 331 came through the TrainLink team. Without the project, these 331 employers would have had to search alternative providers themselves and may not have got the best service – or any service at all - as a result.
- 2.3.5. The project evaluation report also noted that some new employers, who had not previously done business with any of the training providers, were engaged through the project.
- 2.3.6. The project also generated 36 expressions of interest in ISO and 30 expressions of interest in Investors in People (IiP). Of these, 15 companies went on to work towards IiP.

- 2.3.7. As the table above shows, the project 'found' 116 vacancies – i.e. these were not previously known to Jobcentre Plus. 45 of these were filled by the training providers while the remainder were referred to Jobcentre Plus.
- 2.3.8. One of the partners interviewed by Shared Intelligence for the external evaluation also noted that, by carrying out the surveys, field officers were able to identify vacancies they otherwise might not have come across. For example, they could regularly provide engineering training to a company, but through the survey, also identify that there were administrative vacancies within the firm.

3. PROJECT OUTCOMES AND IMPACT

3.1. Outcomes and benefits for employers

- 3.1.1. Informal feedback from employers, recorded by the TrainLink team, suggested that employers had found it easier to access training provision as a result of the partnership working between training providers. In its internal evaluation report, the project quoted one employer as saying, "I wasn't aware of the training help available, until I joined the TrainLink project... I received a prompt and excellent service, which enabled the most suitable training provider to contact me about my training needs".
- 3.1.2. However, feedback from employers was not systematically gathered – the project manager identified in the internal evaluation report that this should be built into the project in future.

3.2. Outcomes and benefits for partners

- 3.2.1. Partners benefited from the project in a number of ways. The TrainLink project manager asked all partners to give feedback on whether the project had benefited them. Additionally, two partners (one of whom had not contributed to the internal evaluation report) were interviewed by Shared Intelligence for this external evaluation. Benefits identified were as follows:
- making contact with businesses that they had not known of before;
 - raising employer awareness of training provision on offer, even with employers that the provider had worked with before;
 - receiving referrals they would otherwise not have got;
 - identifying gaps in provision;
 - finding new placements for learners (so contributing to providers' targets); and
 - improving partnerships with other providers.
- 3.2.2. One partner felt that the key benefit of the project was that "it gave us an opportunity to go back to companies with a completely different approach – before they may not have had a full idea of what we could offer".
- 3.2.3. Views varied on whether larger or smaller providers were more likely to benefit. The project's internal evaluation report suggested that smaller providers felt they had more to gain from the project than larger providers, and that the value for them came from raising awareness of their services with employers. On the other hand, larger providers were in a better position to meet new training needs they uncovered with their employer clients, because the spread of training they could offer was wider. One partner from a larger training provider felt that, as a result, larger training providers were more likely to benefit from uncovering new opportunities and less likely to need to refer these back to the TrainLink team. Meanwhile, a smaller training provider interviewed for the evaluation felt that for their organisation, "the vacancies weren't there" and that "we didn't gain a lot clients".

- 3.2.4. In looking at relationships between partners, interviewees pointed out that these were established prior to the project and that managers from the partner organisations regularly met as part of other networking activities that went on in the county. Nevertheless, the project did provide an new opportunity for field officers to meet and share ideas.
- 3.2.5. Finally, although consultees could generally identify benefits of the project, on the whole they did not feel that these outweighed the costs, or that the project had provided value for money. This was a key reason why the project was not taken forward to a subsequent stage. This is discussed further below.

3.3. Benefits for other organisations

- 3.3.1. As well as facilitating referrals between training providers, the survey of businesses brought out interesting information about employers in Carmarthenshire and highlighted some gaps in provision. For example, it was found that there was a demand for training in French polishing, printing, floristry and auto valeting but little or no training available. TrainLink was able to identify a tutor to provider French polishing training.
- 3.3.2. TrainLink was also asked to supply database information to other organisations, including ELWa, and felt that there would be scope for supplying this information on a commercial basis in future if the project was taken forward.

3.4. Longer term impacts

- 3.4.1. Consultees were asked whether they thought benefits had been sustained in the longer term, since project funding had ceased. Partners interviewed by Shared Intelligence generally found it difficult to comment on this.
- 3.4.2. One felt that there were no clear long-term benefits of the project, but pointed out that this could not be stated definitively. For example, it was possible that information uncovered through the survey process had led to further training opportunities being identified since the project ended. However, only individual field officers would have known whether this was the case and it would be difficult to know how much of this would have happened anyway, in the absence of the project.
- 3.4.3. Another consultee felt that their organisation had not benefited significantly during the project's lifetime, but pointed out that relationships between partners had been maintained since the project had finished. However, these were limited to relationships between management teams at the partner organisations and the networking between field officers had not continued.
- 3.4.4. In terms of the data gathered through the project, this continued to be useful after the project had finished, but the TrainLink team predicted that it would have a 'shelf life' of around 6 months before it was out of date. To provide an accurate picture of needs, survey data would have to be gathered on an ongoing basis.

4. CONTRIBUTION TO LCF OBJECTIVES

4.1. Aims of the Learning Challenge Fund

4.1.1. This section looks at the extent to which the TrainLink project contributed to the aims and objectives of the Learning Challenge Fund. In summary, the key objectives and success criteria for the LCF, are as follows:

- innovation and new approaches in learning provision;
- a strategic approach at national, regional and local levels;
- collaboration between learning providers leading to improved learning networks;
- improving access and widening participation;
- delivering more and high-quality learning outcomes from existing resources; and
- effective mainstreaming of successful projects.

4.1.2. The contribution of each project towards the aims of the LCF is being assessed, partly to see whether the projects that were funded 'fitted' with the LCF's aims, and partly to see whether the LCF as a whole achieved its aims. Therefore, this section summarises both the intentions of the project ('fit') and the achievements of the project in terms of the LCF aims.

4.1.3. The TrainLink project contributed to each of the LCF aims in some ways, as outlined below. The exception to this is mainstreaming, which is discussed in the next section on sustainability.

Innovation

4.1.4. The original concept of TrainLink was widely agreed to be innovative. The aim of promoting collaboration between training providers that had historically been competitors, while gathering valuable survey data on employer needs in the process, had not been attempted before in Carmarthenshire. Consultees were not aware of any other initiatives along the same lines in the sector more widely.

4.1.5. The LCF project was a continuation of the project that had been developed with IDP funding. There were no significant differences between the first and second phases of the project, although there were small changes such as improvements to the questionnaire. Therefore, while TrainLink as a whole was innovative, the LCF was not the source of the innovation, as the project had existed prior to receipt of LCF funding.

Links with local, regional and national strategy

4.1.6. The TrainLink project provided clear links, both in intention and outcomes, to local, regional and national strategies, including Carmarthenshire County Council's strategies for education and lifelong learning and Community Plan; and ELWa and WAG priorities, in terms of:

- reducing economic inactivity and unemployment through identifying new training opportunities;
- contributing to development of a more highly qualified workforce;
- reducing duplication by increasing co-operation between training providers; and
- facilitating partnership working and collaboration between training providers.

Increasing collaboration and joint working between learning providers

- 4.1.7. As noted above, the project increased collaboration and joint working between partners during the lifetime of the project. A particular advantage was setting up networking between field officers, that had not been in place before. Getting providers to share information on their employer clients was seen as a major achievement of the project, although not all partners felt they had seen the benefit of this in terms of increased referrals.

Improving access to learning and widening participation

- 4.1.8. Improving access to learning was not a direct aim of the project. Nevertheless, through the surveys, providers were able to identify new opportunities that could fit their clients' needs. Data on the individual clients who accessed opportunities through the project was not available.

More and higher quality learning outcomes

- 4.1.9. Again, more learning outcomes were achieved through the identification of additional training opportunities via the survey process. As the outputs section above notes, it is likely that these outcomes were additional and would not have been identified or filled in the absence of the project – although it is not possible to prove this definitively.
- 4.1.10. The project did not address quality of learning outcomes.

4.2. Sustainability and mainstreaming

- 4.2.1. The project manager felt that the project had overcome its initial difficulties by the time the pilot came to an end. The TrainLink team envisaged a self-financing model for the project but felt more public funding would be needed first. At the time of the interview with the project manager, no funding had been secured from ELWa or elsewhere to take the project forward formally. The project manager felt that some collaboration between training providers would continue, but that the survey work would not be taken forward.
- 4.2.2. However, not all the partners were as keen to carry the project forward. The two partners interviewed for this evaluation both felt that, although the project had been generally successful, it was not beneficial enough to be worth taking forward. As one partner put it, "the costs outweighed the benefits". One partner also mentioned concerns around the project's model, in particular the way in which it was managed by another training provider. It was suggested that an independent broker might have appealed more to providers.

- 4.2.3. ELWa's view was that, if the partners had been willing to fund the project themselves, it could have been taken forward. However, the ELWa contract manager recognised that some of the project partners had not felt that TrainLink was beneficial enough to be worth putting funding into. It was also pointed out that, at the time, training providers' core funding was being squeezed, and so they would not be willing to spend money on projects unless they provided clear benefits in return.

5. CONCLUSIONS AND LEARNING POINTS

5.1. Conclusions

- 5.1.1. The TrainLink project largely achieved its aims in terms of outputs and offered an opportunity to test the model for information sharing between training providers. Those involved in the project also identified a number of benefits for employers, training providers, clients and other organisations who could draw on the data that the project collected.
- 5.1.2. Nevertheless, the pilot showed that there were still barriers to sharing data and not all of these could be overcome through the project. On the whole, most partners felt that the benefits were not enough to persuade them to take the project further forward. While the pilot had generally achieved its aims, it turned out to be less beneficial than most partners had originally hoped. In light of this, it seems appropriate that the pilot was ended, although the lessons could usefully be disseminated to other training providers. The issues that the TrainLink pilot aimed to address are no doubt still relevant within Carmarthenshire and elsewhere.

5.2. Learning points

- 5.2.1. Consultees felt that there was still potential for the concept and that it might be possible to take it forward in future in Carmarthenshire and other areas. However, there would need to be some changes to the project set up in order for it to work in future. Suggestions for improvements included:
- using an 'independent' broker to co-ordinate the information, rather than another training provider;
 - being more sensitive to the concerns of field officers and working out ways to overcome these; and
 - getting front line staff on board from the start; and
 - interviewing decision making staff within the companies surveyed in order to get the best data.
- 5.2.2. There are also some wider lessons to be drawn from the project. First, it would be useful for similar projects to note that feedback from beneficiaries – in this case, employers – should be built into their internal evaluations. TrainLink did not gather systematic feedback from employers, although the project team later recognised that this could have helped demonstrate benefits of the project more strongly.
- 5.2.3. Secondly, the project highlighted the issues around collaboration and competition between training providers, which should be noted by ELWa. Although each of the providers was very willing to co-operate with the others, the realities of the way that their own core funding and targets were set meant that competition could not be completely eliminated. This manifested itself in reluctance by some field officers to share information and in the length of time it took the project to sort out data handling and other protocols.

- 5.2.4. Finally, the project manager, partners and ELWa contract manager should discuss how best to disseminate lessons from the experience of the TrainLink project, as the concept was recognised by all of those who took part as one that could be of use to training providers elsewhere in Wales.