EVALUATION OF HOUSEHOLDS INTO WORK PHASE 2

FINAL REPORT

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Households into Work (HiW) is an employment support programme led by Liverpool City Region Combined Authority (LCRCA). Clients are offered 1:1 bespoke support for up to 12 months, aimed at helping them identify and overcome the issues that are preventing them from seeking, considering or moving into employment, education or training. The issues faced by people on the programme are complex and varied including debt, finances, housing, mental health, domestic violence, addiction and isolation.

Households into Work takes a whole household approach in recognition of the fact that people can be adversely affected by the issues of other household members, and so working with them in isolation is less likely to achieve a long-lasting solution to their problems. For the purposes of Households into Work, other members of the household may include spouse, partner, children and grandchildren aged 16 and above, parents, grandparents and friends; they do not need to live at the same address as each other. Clients are referred to Households into Work by Jobcentre Plus and by a wide range of other organisations but can also self-refer or may join as a household member of an existing client.

Scope of evaluation

Households into Work has been a key component of LCRCA's employment and skills strategy since its inception. Phase 1 was a two-year pilot from 2018 to 2020, on the basis of which the programme was continued. This report is on the evaluation of Households into Work Phase 2, which ran from 1 October 2020 to 31 March 2023. The evaluation has been carried out by the University of Liverpool's Heseltine Institute for Public Policy, Practice and Place, for the purposes of understanding the outcomes of Phase 2, tracking how the programme has evolved in response to various contextual changes, and informing current and potential future phases.

Programme outputs and outcomes

Phase 2 of Households into Work was a £3.4 million programme supporting 1,528 clients across all six Liverpool City Region local authority areas: Halton, Knowsley, Liverpool, Sefton, St Helens and Wirral. Of the 1,528 clients, 1,267 completed their time on the programme during Phase 2 and the remainder transferred to Phase 3. Of those 1,267 clients, 569 (45%) went into employment, education or training. A further 460 (36%) left with a 'resilience outcome' of progress measured using the Pathway Star tool, or of having undertaken work-related activity, and 237 (19%) left with no measured outcome.

Phase 2 programme evolution

Factors leading to programme-level changes in preparation for or during Phase 2 included: the Covid-19 pandemic, the subsequent effects on policy and the labour market, the requirements of a new funder (the European Social Fund), organisational changes within LCRCA, and the recommendations of the Phase 1 impact evaluation. Households into Work evolved in response, through developments in: consistency of programme approach across Liverpool City Region; team roles; client identification and recruitment; data and monitoring; links with other local services; equality, diversity and sustainability; and differentiation from and alignment with other programmes.

Conclusions and recommendations

The evaluation concludes that the programme was beneficial, being successful in meeting or exceeding its Phase 2 targets. It was well-managed, and was responsive to feedback and to significant changes in context, continuing to evolve and innovate throughout Phase 2. Key to its success were the features of being locally designed, community-based and person-centred; the relationship between clients and their Employment Advocates was crucial to this. The evaluation also reflects on some aspects worthy of continued attention in the design of future phases: recognising the complex needs of clients, the value of accurate data and its interrogation, and how the programme fits within the overall landscape of employment support in Liverpool City Region. Recommendations are summarised in Table 1.

Table 1: Summary of recommendations

Recommendations for:
LCRCA People Delivery Board and HiW programme management team

Inclusion:

1. Monitor the representation and outcomes of different groups and consider targeted activity, e.g. to improve access to the programme for under-served groups or to prioritise support where it will have most benefit

2. Amplify the voices of those with lived experience when developing the programme, e.g. through the LCRCA Lived Experience group and programme evaluations

3. Ensure Employment Advocates receive appropriate training and wellbeing support, and include their perspective in the next programme evaluation

Communication:

4. Develop clearly stated aims and objectives for the current phase to help position the programme in relation to other support; review and adjust if necessary for subsequent phases

5. Clearly articulate the offer of support from HiW, and the types of organisations that can make referrals to the programme, with a view to improving the suitability of referrals and increasing the proportion that translate into registrations

6. Continue to develop relationships with both referral and support organisations at local level, so as to match clients with the most accessible and appropriate support for them, helping to build both individual and community resilience

Data:

7. Continue to refine data collection to provide the information that is most useful, e.g. add a question about previously accessed support in the registration questionnaire

8. Register as a User Organisation with the DWP Employment Data Lab, to enable benchmarking and assist target setting

9. Continue to explore opportunities for research and knowledge exchange using HiW data, e.g. to identify and communicate gaps in broader service engagement and delivery that hinder HiW clients in their journey towards sustained employment

Recommendations for:
LCRCA Employment and Skills Board

10. Review current employment support provision, utilising the range of information sources including programme evaluations and research collaborations to understand what works best and where there are gaps and overlaps

11. Use the available evidence to make strategic decisions about funding and commissioning to improve the efficiency and effectiveness of employment support provision

12. Consider whether key features of HiW (locally designed, community-based, person-centred) could beneficially be translated to other areas of service delivery

13. In service areas that are not locally devolved, make the case for longer-term funding commitments and sufficient time within bidding processes to gather evidence and meaningfully involve partners in developing proposals

Part A: Background

1. Introduction

The University of Liverpool's Heseltine Institute for Public Policy, Practice and Place was appointed by Liverpool City Region Combined Authority (LCRCA) to evaluate Phase 2 of the Households into Work (HiW) programme, which was developed to follow on from an initial two-year pilot phase. The purposes of the evaluation have been to:

- Understand the outcomes of Phase 2
- Track how the programme has evolved in response to various contextual changes
- Inform current and potential future phases.

This evaluation report is in four parts:

- Part A describes the origins of the HiW programme and its Phase 2 operation
- Part B sets out the programme outputs and outcomes
- Part C considers the drivers for changes to the programme at the start of and during Phase 2, and how the programme was developed in response to those changes
- Part D provides conclusions and recommendations.

2. Households into Work pilot

HiW Phase 1 was one of five innovative employment schemes announced in 2017 and funded as pilots by the Department for Work & Pensions (DWP). They were delivered by combined authorities with the aim of providing specialist tailored support to help disadvantaged jobseekers – including disabled people and older people – tackle long-term barriers to work and in-work progression.[1]

The schemes were:

- Cambridgeshire and Peterborough – Health and Care Sector Progression Academy
- Liverpool City Region – Households into Work
- Tees Valley – Routes to Work
- West Midlands – Connecting Communities
- West of England – Future Bright.

Each scheme was locally designed with aims and objectives reflecting local priorities. HiW, led by LCRCA, aimed to test an approach that focused efforts on Liverpool City Region (LCR) households where two or more adults were out of work, providing employment-focused support to people who, because of their present circumstances, were unable to seek or sustain employment. It reflected wider welfare changes, which saw a household focus introduced to Universal Credit.

HiW was designed in the context of a city region of 1.5 million people with a £29 billion economy, but high levels of deprivation and long-standing issues with entrenched worklessness often linked to poor health, and a comparatively high proportion of young people not in education, employment or training.[2]

The objectives of the pilot phase were:

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[1] Department for Work and Pensions and Ministry of Housing, Communities and Local Government, '£35 Million of Innovative Employment Schemes to Benefit Thousands of Disadvantaged People'.
[2] Liverpool City Region Combined Authority, 'Households into Work Programme Business Case - Summary'.

- Determine the extent to which a household-based approach to employment will improve employment prospects and job outcomes for customers
- Identify the learning from better local integration of services to deliver outcomes for customers
- Identify the impact of improved resilience to get and keep a job and the extent to which this supports sustained job outcomes
- Identify systemic improvements which will improve the processes to support customers into work
- Capture learning from the innovation to inform wider public service reform.

Following the pilot, the programme was extended with funding from the European Social Fund (ESF) and the LCRCA Strategic Investment Fund (SIF) and is now in its third phase, as shown in Table 2 below.

Table 2: HiW phases

	Start date	End date	Funding sources
Phase 1 (pilot)	01/03/2018	28/02/2020	DWP, LCRCA
Covid Response Phase	01/03/2020	30/09/2020	DWP
Phase 2	01/10/2020	31/03/2023	ESF, LCRCA SIF
Phase 3	01/01/2023	31/03/2024	LCRCA SIF

Phase 2 was due to start in March 2020 but was delayed by the onset of the Covid-19 pandemic. Instead, a 6-month interim programme of support was put in place using remaining budget from the Phase 1 DWP allocation.

Phase 2 was originally due to end on 31 December 2022 but was extended to maximise the benefits of the ESF funding. The total funding for Phase 2 was £3.4 million. During the extension period, the programme continued to support existing clients and their outcomes were attributed to Phase 2, but new clients were registered to Phase 3. On 1 April 2023, remaining Phase 2 clients who had not yet completed the programme were transferred to Phase 3.

3. Households into Work Phase 2

3.1 Aims and objectives

The HiW pilot was a key element of the LCRCA Skills Strategy 2018–2023, which set a target of a higher percentage of the city region's working age population in employment, and a higher percentage of those in employment being in good quality jobs.

Phase 2 of HiW aimed to build on the success of and learning from Phase 1, by providing a more connected, focused and meaningful programme supporting LCR residents to find sustainable employment. Although not framed as objectives, the ESF application did define core principles for Phase 2:

- Participants' explicit consent to and understanding of the programme that they are accessing
- Active engagement of participants, with them taking control, responsibility and ownership of their support
- Co-design of input and support between participants and Employment Advocates
- Capacity building of participants and households to facilitate them to move from dependence to independence
- Increasing economic and social resilience, to enable households to cope with a changing labour market
- Equal access to emerging employment, training and education opportunities within LCR.

The overall LCR economic picture at this time was of a diverse, £32 billion economy, but still with persistently high levels of economic inactivity, underlying health inequalities, entrenched concentrations of deprivation, structural weaknesses in parts of the business base, and performance gaps to close in terms of prosperity and productivity in relation to the UK as a whole.[3]

HiW is embedded in both the LCRCA Corporate Plan 2021–2024 as part of the priority action area of a fairer city region, and the Liverpool City Region Plan for Prosperity under the theme of turning people's potential into prosperity, with the objective to 'ensure our people have the skills and opportunities to realise their full potential and meet the needs of a rapidly changing economy'.

3.2   Governance and administration

This section describes the programme governance and administration structure as it was in March 2023, at the end of Phase 2. Changes that took place during Phase 2 are discussed in Part C of this report.

The HiW team is part of LCRCA and subject to its corporate policies and procedures. Governance of the programme is as shown in Figure 1.

The team is made up of community-based Employment Advocates and their Team Leaders, and a central programme management function led by a Programme Manager with other programme support staff as shown by Figure 2. As of September 2021, there were 22 Employment Advocates, distributed for operational purposes between the geographic areas of Knowsley and St. Helens, Halton, Liverpool, Sefton, and Wirral.

There is a set of programme-level policies and procedures guiding the operation of HiW that includes, amongst others, a Policy Manual, Compliance Policy, Equality and Diversity Policy and Action Plan, Sustainable Development Policy and Plan, Job Descriptions and Pathway Star User Guide.

Figure 1: HiW programme governance

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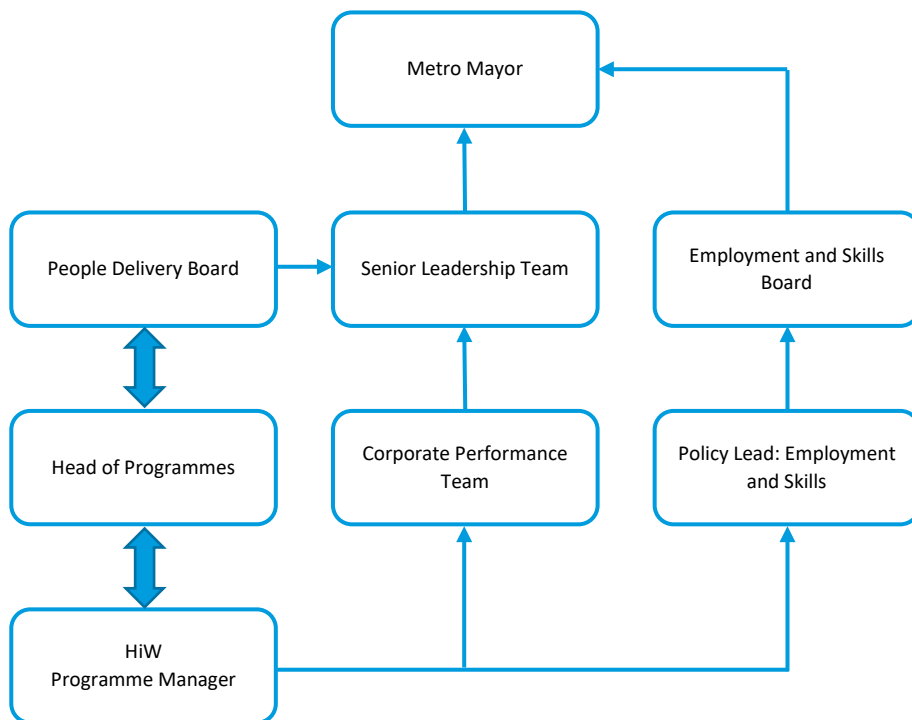
[3] Liverpool City Region Combined Authority, 'Liverpool City Region Local Industrial Strategy: Statement of Emerging Strategic Priorities'.

Figure 2: HiW team structure
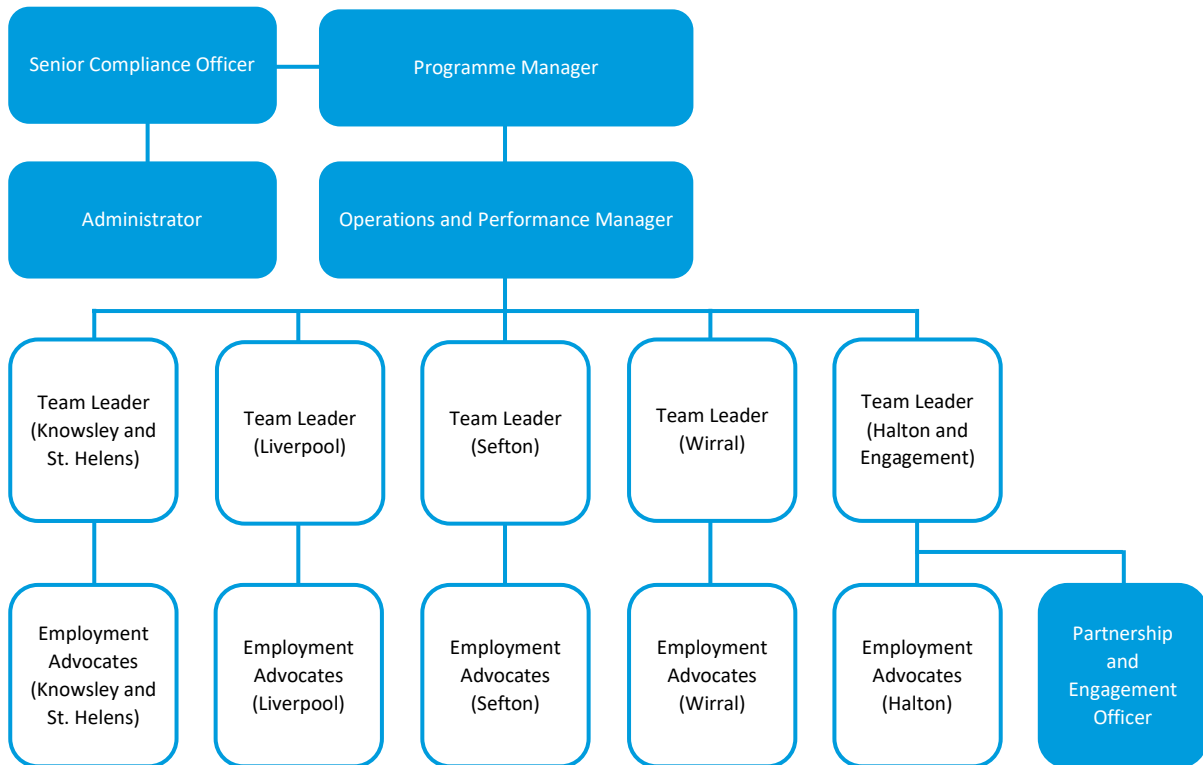
3.3 Delivery model

HiW clients are offered 1:1 bespoke support for up to 12 months, aimed at helping them identify and overcome the issues that are preventing them from seeking, considering or moving into employment, education or training. The issues faced by people on the programme are complex and varied including debt, finances, housing, mental health, domestic violence, addiction and isolation.

HiW takes a whole household approach in recognition of the fact that people can be adversely affected by the issues of other household members, and so working with them in isolation is less likely to achieve a long-lasting solution to their problems. For the purposes of HiW, other members of the household may include spouse, partner, children and grandchildren aged 16 and above, parents, grandparents and friends; they do not need to live at the same address as each other. This is an expansion of the definition used in Phase 1, a change discussed in more detail in Part C.

On referral, an individual is assigned an Employment Advocate (EA) who is based in their local authority area and will support the individual for their entire time on the programme, which is up to 12 months depending on their needs. Other members of the same household who also join the programme will be assigned the same EA. EAs work primarily on an outreach basis, meeting clients in their homes, local libraries, coffee shops and other suitable community venues.

The programme seeks to help clients move closer to the point where they are not only able to look for a job, but also can sustain it when found. The process followed with each client from referral to being a 'completer' (leaving the programme with a measurable positive outcome) is summarised by Figure 3.

Figure 3: Client journey

Maximum of 12 months on programme

Entry (Referral)
- Jobcentre Plus referrals
- Non-JCP referrals from a variety of organisations across the LCR (including but not limited to community centres, mental health services, health centres, refugee groups, Adult and Social Care, Adult Learning Service and Citizens Advice)
- Self referrals

Pre-registration assessment
- Confirmation of eligibility for the programme (including corresponding evidence)
- Pre-registration assessment: 'getting to know you' establishing whether the programme is suitable for the individual's needs or whether other provision would be more suitable

Registration
- Registration onto programme
- First Pathway Star completed at registration to establish a baseline and begin action planning

Advocacy
- Intensive support to client in the form of IAG, action planning and referrals to other support services
- Stars completed every 7 weeks on programme
- Details of support and actions recorded in the CRM

Outcomes
- Progress measures
- Courses (non-vocational/non-educational support such as confidence building, life skills and personal effectiveness)
- Work-related activity (voluntary or unpaid, work experience)
- Education or training
- Employment (and/or seeking employment for inactive clients)

Wraparound support
- Following employment or education and training outcome
- Light touch support
- Focus on developing and maintaining stability and sustainability
- Maximum of 12 weeks but will not exceed 12 months of support from the programme

Completer
- Sign-off from programme
- Last star completed at sign-off (or up to 4 weeks prior) to establish full progress made while on programme

Source: LCRCA

3.3.1   Referral

In order to be eligible for referral to the programme, individuals must be unemployed or economically inactive, aged 16 or over, have the right to live and work in the UK, and be a resident of LCR.

There are four main referral routes:

- Referral by Jobcentre Plus
- Referral by another organisation
- Self-referral
- Client referral

The first route is via Jobcentre Plus. Work Coaches promote the programme to their customers and will refer them if appropriate and if the client agrees. Whereas referrals to some employment support programmes are mandatory for certain groups, i.e. individuals may face benefits sanctions if they refuse, referrals to HiW are always voluntary.

The second route is referral by another organisation. These include the local authority Ways to Work employability programmes, i.e. Halton People into Jobs, Knowsley Works, Liverpool in Work, Sefton@Work, St Helens Ways to Work, and Wirral Ways to Work, but also a wide range of other local authority and NHS services, housing associations and voluntary sector organisations. Referral via Jobcentre Plus had been the most common route in Phase 1, but in Phase 2 it was overtaken by the combined referrals from other organisations (see Sections 6.1 and 11.2 for a full breakdown and further discussion).

The third route is self-referral by people who have heard about the programme by word of mouth or direct programme communications channels such as social media.

The fourth option is client referral, where a household member of an existing client (using the wide definition of household described above) is considered for enrolment on the programme so that they can be supported alongside each other.

The EA assesses each individual referred to them not only for eligibility but for suitability – the extent to which they might benefit from the programme (see Figure 9 in Section 11 for further details). Suitable clients are those that meet the eligibility criteria and are also experiencing barriers to work, but whose support needs are not so significant that they are unlikely to be able to move towards employment during the following 12 months.

3.3.2   Registration

Following the first meeting between an EA and a potential client, there is a 4-week pre-registration period during which the EA gathers paperwork to support eligibility but also builds understanding with the client so as to have a clear picture of their circumstances. If an individual is refused as a client, feedback on the reasons will be provided to the referral partner and, where possible, other referrals will be made to assist the individual with their most pressing issues.

On or before registration, the first Pathway Star is completed to provide a baseline against which progress can be measured. Pathway Star is a tool developed specifically for HiW and used collaboratively by EAs with their clients at regular intervals to help reflect on the client's barriers to work and record their journey on the programme. A review of the household's budget is also carried out. This helps to identify any issues with finances and begins to give the client some basic budgeting skills and advice, which can help them manage bills and debts, and to check they are accessing the correct benefits.

3.3.3   Support

Following registration and building on their detailed discussions of the client's circumstances, the EA and client will co-produce a SMART (specific, measurable, achievable, realistic and time bound) Action Plan. The EA will then provide intensive support, tailored to the requirements of the client, in the form of information, advice and guidance to help them put their plan into practice. Integral to this will be signposting to alternative provision and other organisations. The EA and client will meet regularly at a location convenient and comfortable for the client to review progress and update the Action Plan, completing further Pathway Stars at intervals throughout.

The EA role is seen as distinctive from other programmes, with its emphasis on advocacy – reaching out into communities to engage with clients, working on their behalf to secure assistance from other services and providing a 'warm introduction' when referring them on.

If the client enters employment, education or training, they are offered a further 12 weeks of wraparound support (within the maximum 12 months on the programme). This is more light-touch, focusing on helping the client to settle in their new situation so that the positive outcome is sustained.

A final star is completed during the four weeks prior to the client's end date to discuss and record progress. If they are going on to wraparound support, this takes place beforehand. If appropriate, they may be referred on to another service; for example, if 'job ready' they might move on to Ways to Work for employability information, advice and guidance such as CV-writing skills.

Figure 4: The HiW team

4.   Evaluation purpose, scope and approach

Phase 1 of HiW was subject to two linked evaluations, which provided the rationale for continuation of the programme:

- A qualitative, formative evaluation by the Heseltine Institute to focus on the mechanisms by which the programme was leading to improvements, drawing on detailed interviews with client households[4]
- A quantitative, summative evaluation by AMION to understand programme outcomes and impacts, its value for money, and the policy and delivery lessons learnt.[5]

The Phase 2 evaluation covers the period 1 October 2020 to 31 March 2023. Its purposes are to:

- Understand the outcomes of Phase 2
- Track how the programme has evolved in response to various contextual changes
- Inform current and potential future phases.

Since the earlier evaluations covered value-for-money and client experience in depth, this Phase 2 evaluation has not sought to carry out further detailed analysis of these aspects but has drawn on the information already available.

Phase 2 analysis has been based on detailed interviews and correspondence with members of the programme management team and other LCRCA staff, backed up with existing data from a range of sources, including:

- Phase 1 evaluations
- Matrix Standard assessments
- Funding documentation
- Programme reports
- CRM data, including Pathway Star data
- Client feedback survey
- Case studies prepared by Employment Advocates.

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[4] Tyrrell, 'Households into Work: Interim Evaluation of Pilot Programme'.
[5] AMION Consulting, 'Impact Evaluation of the Households into Work Pilot'.

Part B: Programme outcomes

5. Performance against targets

Table 3 below summarises the headline outputs and outcomes of Phase 2 of the programme against the ESF targets. Targets and actuals are for the period 1 October 2020 to 31 March 2023. ESF targets are specified in numbers of participants, and all have been exceeded. Percentages are shown to provide an additional measure against expectations (discrepancies are due to rounding), and it can be seen that the programme has been more successful in recruiting clients who are unemployed than who are economically inactive.

Under ESF rules, only one ESF 'result' can be claimed per participant, and the measurement point is at the end of the participant's time on the programme. These are employment outcomes, or 'hard' outcomes. As a way of quantifying progress towards employment, the team has added 'soft' outcomes that reflect a client's increased resilience based on skills development or work-related activities they have undertaken during their time on the programme and any 'forward steps' in other areas of their lives reported using the Pathway Star tool.

Table 3: Phase 2 key outputs and outcomes

Key outputs and outcomes	Target	Actual
Total registrations	**1,010**	**1,528**
Of which: Unemployed, including long-term unemployed	505 (50%)	906 (59%)
Of which: Economically inactive	505 (50%)	622 (41%)
Total participants		**1,528**
Of which: Support continued into Phase 3		261
Total leaving programme		**1,267**
Total leaving with an ESF result	**389 (39%)**	**569 (45%)**
Of which: Unemployed into employment	88 (9%)	171 (13%)
Of which: Economically inactive into employment or job search	131 (13%)	164 (13%)
Of which: Newly engaged in education/training	170 (17%)	234 (18%)
Total leaving without an ESF result		**697 (55%)**
Of which: Left with a soft outcome (completer)		460 (36%)
Of which: Left with no outcome (leaver)		237 (19%)

6. Outputs

The full list of ESF output targets and achievements against these is shown in Table 4 below. Again, these are for the period 1 October 2020 to 31 March 2023. When the ESF numerical targets are converted into percentages of total participants, it can be seen that the proportions of registered clients from certain disadvantaged groups (ethnic minorities; people with disabilities) are slightly lower than might have been expected.

Table 4: Phase 2 performance against ESF output targets

ESF outputs	Target	Actual
Total participants	1,010	1,528
Unemployed, including long-term unemployed	505 (50%)	906 (59%)
Inactive	505 (50%)	622 (41%)
Participants over 50 years of age (i.e. 51-plus)	190 (19%)	289 (19%)
Participants from ethnic minorities	141 (14%)	166 (11%)
Participants with disabilities	314 (31%)	406 (27%)

An equity audit of HiW is being carried out as part of a separate Economies for Healthier Lives project, which will use census data combined with programme data to assess whether different groups are proportionately represented on the programme and whether they experience different outcomes. Its date parameters may not correlate exactly with Phase 2, but it will help illuminate, for example, whether future phases should seek to further improve outreach.

The following sections look at referrals, client characteristics and support needs in more detail.

6.1 Referrals

A total of 3,529 referrals were considered for Phase 2. Of these, 1,580 (45%) were accepted, leading to 1,528 registrations. Referrals were declined because an individual was either ineligible for the programme, unsuitable for it, or was not contactable. There was an approximately even split between those three reasons.

Referrals came from over 200 organisations including job centres but also ranging from local authority and NHS services to housing associations, community centres and voluntary organisations. This breadth is reflective of the outreach work carried out by the team, especially locally by the EAs. In addition, individuals were able to self-refer, and to be referred by another household member who was already a client (client referral).

For the referrals where a referral source is recorded (2,730 in total), the breakdown by type is shown in Figure 5. It can be seen that the split between referral routes for all referrals and for those that were accepted is broadly similar, with self and client referrals having a higher success rate. This is as might be expected since the programme screens for suitability, which includes commitment to moving towards employment and if someone is referring themselves or being referred by a household member this is likely to be something they have already thought about.

Figure 5: HiW referrals by type
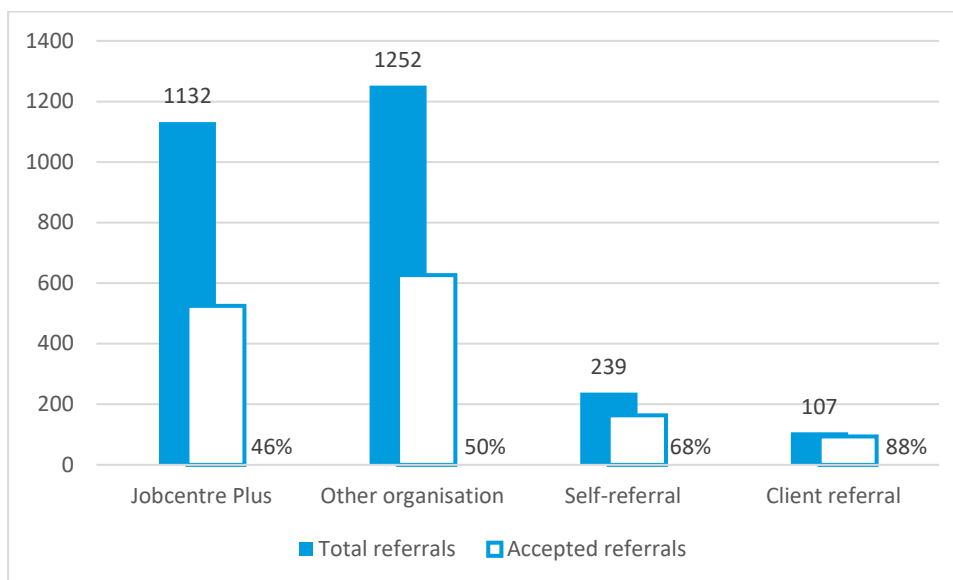
Source: CRM data (LCRCA)

6.2   Client characteristics

Data collected at registration enables analysis of the HiW Phase 2 client cohort. With the caveat that this is self-declared information and not verified except where necessary to evidence eligibility or ESF outputs, some headline statistics about Phase 2 clients include:

- 84% lived in a jobless household
- 59% had either never had a job or had been out of work for more than 2 years
- 54% had personal debt, and 16% had personal debt of at least £4,000
- 52% identified mental health as a support need
- 49% had a disability or long-term health condition limiting their ability to work
- 40% lived in social housing
- 24% had used a foodbank within the previous 3 months
- 21% were lacking basic skills in English or Maths
- 16% were homeless or at risk of housing exclusion
- 8% were classified as an offender.

Further analysis is available at Appendix 1.

6.3   Client support needs

As part of the discussion at registration, clients are asked about the issues they are experiencing that are presenting a barrier to them seeking or sustaining employment. These are the issues that the EA will then support them to address. Table 5 shows the Phase 2 prevalence of these issues as recorded in the CRM. Mental health was by far the most frequently cited support need.

Most clients reported multiple needs:

- 67% of clients had two or more support needs
- 50% had three or more
- 30% had four or more.

There is some overlap in the issues identified as support needs and those recorded as client characteristics elsewhere in the registration questionnaire. For example, 16% of clients were homeless of at risk of housing exclusion (see Section 6.2 above), while 12% cite being homeless or temporarily housed as a support need. The programme management team is planning to review the questions to either avoid or more clearly explain apparent discrepancies.

Table 5: HiW client support needs

Support need	No. of HiW clients	% of HiW clients
Mental health issues	793	51.9%
Parent (with children under 18)	444	29.1%
Lone parent	311	20.4%
Chronic health condition	272	17.8%
Has care responsibilities	233	15.2%
Victim of domestic abuse	204	13.4%
Learning disability	189	12.4%
Homeless/temporarily housed	184	12.0%
Physical disability	158	10.3%
Ex-offender	124	8.1%
Not in work or training (adult)	93	6.1%
Drug misuse	92	6.0%
English is not first language	89	5.8%
Problem drinking	71	4.6%
Sensory impairment	65	4.3%
Care leaver	50	3.3%
On community sentence	32	2.1%
Ex-armed forces	31	2.0%
Refugee	22	1.4%
Teenage parent	12	0.8%
Asylum seeker	6	0.4%

7.   Employment outcomes

The full list of ESF result targets and achievement against these is shown in Table 6 below. ESF results can only be claimed when the client completes their time on the programme, and there were 1,267 Phase 2 clients who did so during the measurement period, which was up to 31 March 2023.

Table 6: HiW Phase 2 employment outcomes

ESF results	Target (1010 clients)	Actual (1,267 clients)
Participants in education/training upon leaving	170 (17%)	234 (18%)
Unemployed participants into employment (including self-employment) on leaving	88 (9%)	171 (13%)
Inactive participants into employment or job search upon leaving	131 (13%)	164 (13%)
Total leaving with an ESF result	**389 (39%)**	**569 (45%)**

There were two targets against which achievement has not been measured; this was discussed and agreed with ESF programme managers. 'Participants in employment six months after leaving' is information that can be requested by the ESF programme directly from DWP using client identifiers provided by HiW. 'Participants with childcare needs receiving childcare support' was included because parents, specifically lone parents, had been identified as a target client group and to ensure that the household budget could be used to fund childcare if needed. Engagement with this group was measured instead using the registration data (see Table 5: HiW client support needs; Figure 6: Household budget expenditure; Figure 20: Household composition of HiW clients).

8.   Resilience outcomes

Under ESF rules, only one ESF result can be claimed per participant, and the measurement point is at the end of the participant's time on the programme. Therefore, as a way of quantifying progress

towards employment, the team has added 'soft' outcomes that reflect a client's increased resilience based on skills development or work-related activity they have undertaken during their time on the programme and any 'forward steps' in other areas of their lives reported using the Pathway Star tool.

In addition, qualitative information is collected through case studies and a client feedback survey, which helps to give a richer picture of the resilience outcomes that clients achieve. Each of these indicators is discussed in more detail below.

8.1.1 Skills development and work-related activity

Of the 1,528 HiW Phase 2 clients, 689 achieved a soft outcome based on undertaking skills development or work-related activity. A total of 596 skills-development activities and 186 work-related activities were recorded. The following is a selection of these outcomes, to illustrate the wide range of courses and activities undertaken and organisations engaged:

- Cookery for Healthy Eating at Brighter Living Southport
- Coping with Anxiety at The Women's Centre
- English for Speakers of Other Languages (ESOL)
- Confident Interview Skills at Wirral Lifelong Learning
- Fit Fans at Tranmere Rovers
- Men's Mental Health Exercise Group at Running Head First
- Online Health and Safety Awareness with Construction Industry Training Board (CITB)
- PTSD Support Group at Sole Survivor CIC
- Think Differently, Cope Differently at Kindfulness Coffee Club
- Understanding Addiction at Addaction
- Understanding Autism at Learning Curve Group
- Volunteering at Pawprints Wildlife Rescue Centre
- Work experience at the Body Shop.

8.1.2 Pathway Star

Pathway Star is a distance-travelled tool developed by Triangle Consulting as a version of its Outcome Star that is tailored to people overcoming barriers to work. The Pathway Star covers eight areas:

- Skills
- Stability at home
- Money
- Healthy lifestyle
- Emotional wellbeing
- Family and relationships
- Friends and connections
- Confidence and aspirations.

Employment Advocates use the Pathway Star at their regular meetings with programme participants (clients) to jointly discuss and record where the participant feels themselves to be on a five-stage Journey of Change for each area. The Journey of Change language was developed during the initial testing of the tool and the terms chosen were the ones that resonated most with the EAs based on their experience of working with clients, i.e.:

- Stage 1 – 'not yet ready'
- Stage 2 – 'talking about it'
- Stage 3 – 'giving it a go'
- Stage 4 – 'keeping going'
- Stage 5 – 'managing OK'.

Use of the Pathway Star is not just for programme monitoring purposes – the collaborative process of completing successive stars encourages the client to reflect on their journey and helps to build their resilience. 'Giving it a go' is seen as the tipping point, the most important stage, where the client begins to take the initiative in making changes.

The first star is completed during the pre-registration period, to provide a baseline. Stars are then due every 6 weeks, with the final star being within the four weeks prior to the client's end date. Wrapround support (i.e. if the client starts employment) is more light touch and does not involve completing stars.

Star data is recorded in the CRM and is used as a means of monitoring performance of EAs as well as progress of clients. EA performance is reflected in progress measures, a progress measure being a positive movement of one or more steps. If a negative movement is subsequently experienced, the progress measure is still counted so that the work of the EA is represented. Client progress is recorded as steps, each step being a positive or negative movement of one stage in the Journey of Change.

Table 7 shows the number of steps achieved in each Pathway Star area during the time on the programme, as an average across all clients for whom data is available (negative steps are included within these totals). While it might seem as though the programme was comparatively less successful in the area of family and relationships, for example, it can be seen by the inclusion of the average baseline scores that this was area with less scope for improvement. The areas of skills, emotional wellbeing, and confidence and aspirations, meanwhile, had low starting points on average, which resonates with mental health issues being the most prevalent support need as shown by Table 5.

The average number of forward steps across all clients and all areas was 4.2. This is an arithmetic mean and, again, it includes negative steps. It also includes 66 clients who only completed one star before disengaging with the programme and therefore achieved zero steps.

Of course, each Journey of Change is highly individual, and this is where other sources of data such as the case studies and client feedback survey can help paint a more nuanced picture.

Table 7: Average Pathway Star outcomes across all Phase 2 clients

Pathway Star area	Average score on first star	Average number of steps
Skills	2.6	0.7
Stability at home	3.1	0.5
Money	2.7	0.6
Healthy lifestyle	3.0	0.4
Emotional wellbeing	2.5	0.7
Family and relationships	3.1	0.3
Friends and connections	2.9	0.4
Confidence and aspirations	2.6	0.7
Total steps achieved		**4.2**

n = 1,521

8.1.3 Client feedback survey

The client feedback survey includes questions relating to resilience. A text with a link to the anonymous survey is sent to all clients once they reach the three-month point on HiW. It is repeated every few months during their time on the programme and on completion. Analysis of client responses during Phase 2 shows:

- 86% agreed that 'I'm more confident following my time on Households into Work'
- 73% agreed that 'I'm better equipped to tackle any problem that comes my way'
- 65% agreed that 'Being on Households into Work made me consider employment as a viable option (this rose to 72% among those who had left the programme)

- 63% agreed that 'I have gained skills I did not previously have' (this rose to 72% among those who had left the programme).

It should be noted that these are percentages of responses (n=479) rather than respondents: a client may complete the survey several times, and the views of those who complete it more frequently will be more strongly represented, including in the free text responses discussed below.

Survey respondents can provide free text answers to questions about how they would describe their time on the programme, and whether they have any suggestions for improvement. Analysis of these responses reveals some common themes, typified by client quotes:

"I didn't know what help was out there"

Through the programme, clients can access help with a variety of issues that may be presenting a barrier to them looking for, obtaining or sustaining work. These might be, for example, housing, finances, or mental health. Usually, they were not getting the help they needed prior to starting on the programme, and often they were unsure how to.

"He listens and does not judge"

The value of personal support from an Employment Advocate is a strong theme in the survey responses. There are many comments praising the skills and attributes of the EAs – their knowledge, flexibility, patience and kindness – and suggesting that the relationship with the EA was central to client achievements on the programme.

"A light out of a dark tunnel"

It is clear from the comments (and backed up by other data) that mental health is a significant issue for many clients, often linked to other difficulties in a complex picture. Many survey responses describe how the programme has helped the client through a difficult time in their life, and that they now feel more confident and positive. This change is often attributed to the Employment Advocate: specifically, their trustworthiness in doing what they have said they will do, and their checking in on the client every week.

"Everyone should get this help"

Some responses contrast HiW with their experience of other programmes and services. Reasons included: the needs of other household members being taken into account, the sustained support over 12 months, the reassurance of having a personal Employment Advocate to call on, and the individualised approach.

8.1.4 Case studies

The CRM facilitates the compilation of case studies by linking client records to a timeline so that interventions can be viewed in chronological order. A standardised form has been produced so that they can translate this timeline into an anonymised summary that sets out the client's situation on referral, key aspects of how they and the EA have worked together during their time on the programme, and their situation on completing the programme.

The client journey maps at Appendix 2 are based on a selection of these anonymised case studies. While they do not include every recorded interaction with the client, they aim to illustrate the client's Journey of Change in relation to the Pathway Star areas and provide examples of how the programme has supported clients to move towards employment.

9. Household budget expenditure

EAs have access to a discretionary budget for each household, to assist clients with items of expenditure that will aid them in achieving outcomes. All household budget expenditure is recorded using the CRM. For items over £10, requests are submitted by the EA and approved by their team leader. Items under £10 do not need team leader approval.

The total household budget expenditure of £88,429.44 across Phase 2 of the programme represents an average spend per client of £57.87 and an average spend per employment outcome of £155.41.

While there is a theoretical allocation of £250 per client, all purchases must be justified and EAs are encouraged to first make use of any other funding available, e.g. Glasspool or other charities with hardship funds.

Figure 6 below gives an indication of the types of items purchased, and the total expenditure and number of transactions for each. These are summary headings; some (e.g. clothing and footwear) are broken down further within the CRM according to whether the items are for work purposes or not. The biggest total outlay was on equipment, while the largest number of individual payments were to cover transport costs.

Expenditure per client ranged from £0.95 (a 'top-up' to a Glasspool grant to buy bedding) to £615.99 (various support including an emergency electricity pre-payment while awaiting benefits payment, training courses and travel to an interview).

A comparison can be made with Phase 1, where the expenditure per client was much higher at around £180. The largest number of transactions were in the travel category (as in Phase 2), but the highest total expenditure was on health and wellbeing.

Once again, personalisation is important. One client might not need the household budget at all, while another might receive a comparatively high level of financial assistance and leave without a recorded outcome, but if their situation has stabilised as a result then this expenditure has still been beneficial.

Figure 6: Household budget expenditure
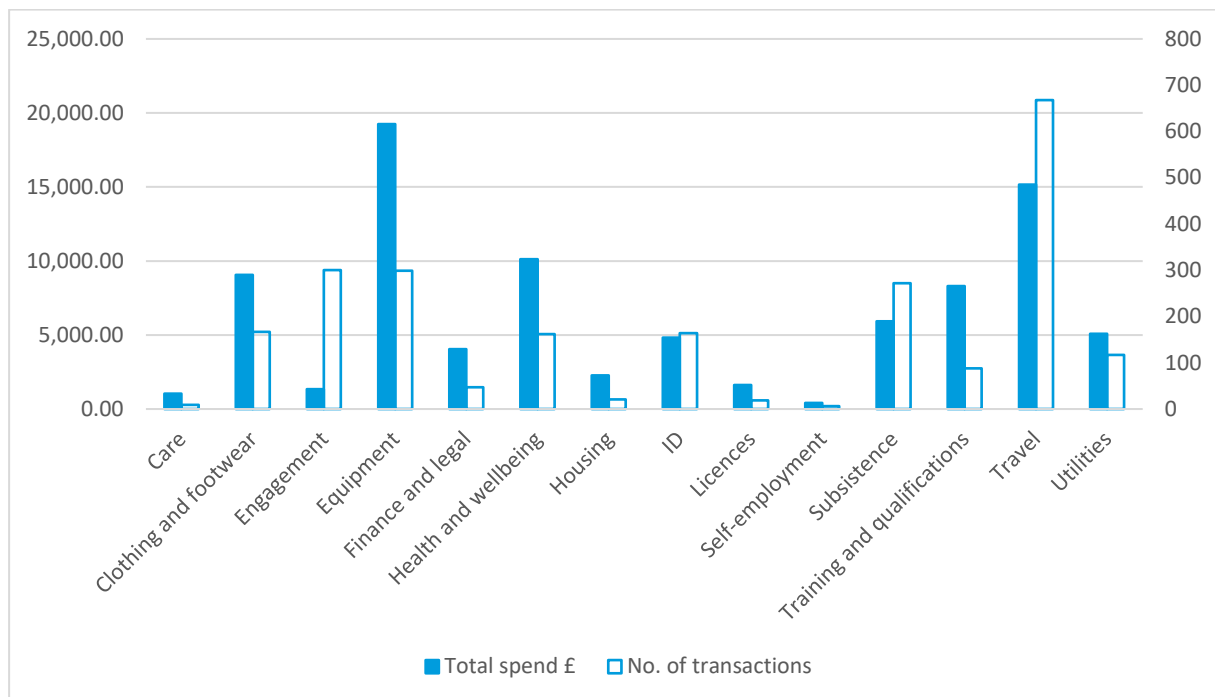
Source: CRM data (LCRCA)

Part C: Programme evolution

This section aims to chart how the HiW programme evolved during Phase 2 in response to contextual changes. It first considers the various main drivers for change and then how the programme was developed in response to these. Some key milestones are shown below in Figure 7 (preparation for Phases 2 and 3 has taken place during delivery of the prior phase).

Figure 7: HiW Phase 2 timeline

December 2019 to February 2020
- Phase 2 preparation and development (new client journey, new paperwork, new performance monitoring regime, new sustainability plan, new equality and diversity plan, new HiW policy and procedure manual)
- Getting ready to deliver Phase 2 under ESF regulations

March 2020
- As Phase 2 is about to be launched, Covid-19 hits the UK leading to lockdowns and other restrictive measures
- The decision is taken to put Phase 2 on hold and switch focus to staff supporting the Covid response

August 2020
- Change request submitted to ESF to alter the planned Phase 2 delivery period, giving the programme the best chance to achieve its contractual targets

October 2020
- Phase 2 delivery commences on 1 October 2020
- Roll-out of pre-paid cards to EAs follows, to enable efficient and flexible household budget spend (February 2021)

April 2021
- Local authority co-location agreement is brought to an end
- EAs switch to a community-based hybrid working model
- All staff provided with LCRCA laptop, phone and tablet

July 2021
- Development of local-level initiatives designed to bring together clients experiencing similar issues in order to promote social support networks

September 2021
- Matrix Standard accreditation, enhancing programme reputation and credibility

November 2021
- Launch of InForm, bespoke programme CRM

September 2022
- Matrix Standard assessment review (annual check that still working to the required standard)
- Accreditation retained

October 2022
- Change request submitted to ESF to extend Phase 2 by 3 months to maximise use of the funding
- ESF audit completed with 0% error rate and no recommendations or actions

January 2023
- Phase 3 commences on 1 January 2023 and begins registering new clients
- Overlap between Phases 2 and 3 during which results are claimed for completing Phase 2 clients

March 2023
- Phase 2 ends on 31 March 2023
- Remaining Phase 2 clients are transferred to Phase 3

November 2022 to March 2023
- Phase 3 preparation and development

Preparation

Delivery

10. Drivers for change

This section aims to identify the main factors precipitating changes to the HiW programme during Phase 2 and comprises various contextual changes plus lessons from Phase 1.

10.1 Covid-19 pandemic

HiW Phase 2 had been due to start in March 2020, with funding secured from ESF and matched by LCRCA. However, with the arrival of the Covid-19 pandemic, a decision was taken to delay the start of Phase 2 for six months and to put in place an emergency programme of support using funding remaining from Phase 1.

At the onset of the pandemic HiW Employment Advocates carried out welfare checks on all Phase 1 clients by phone. Around half the Phase 1 clients were contactable and of these, 304 asked to be contacted again, with the frequency ranging from daily to monthly. Themes of the calls included housing, benefits, employment, mental health and addiction.

In addition, a new element was introduced to the programme: the Covid Response Phase. This offered up to 12 weeks of support to any LCR resident who needed help to stabilise their situation, regardless of whether there were other household members also willing to join the programme. They were allocated an Employment Advocate, who worked with them depending on their needs, for as little as half an hour, e.g. providing information about food banks or referring them to Ways to Work, up to the full 12 weeks, e.g. sorting out a problem with benefits or housing. At the end of the 12 weeks, if the individual met the programme criteria, they would be 'soft-registered' as a client, i.e. their details were taken so that they could be fully registered when the programme re-started if still eligible (there were 71 people on this 'waiting list'). If they did not, but were still in need of support, they were referred to an appropriate service such as Citizens Advice.

The pandemic had the effect of further disadvantaging the HiW client group: it acted more severely on the health of people who were physically vulnerable, and the control measures such as lockdowns disproportionately affected people who were economically vulnerable.[6] Many services moved online; for example, while jobcentres remained open, for the majority of customers face-to-face assessments were suspended and support from Work Coaches was provided online or by phone.[7]

10.2 Policy and labour market context

The UK Industrial Strategy was launched in 2017 with the aim of addressing long-term economic challenges including regional gaps in pay and productivity. The intention was for phased introduction of Local Industrial Strategies, led by Mayoral Combined Authorities or Local Enterprise Partnerships, to promote the coordination of local economic policy and national funding streams.

LCR submitted its draft Local Industrial Strategy to government departments in March 2020, with HiW as a prominent case study in addressing the foundations of productivity, and a key action being the continuation of programmes to support people out of economic inactivity through highly targeted support.

However, in 2021, the government announced the replacement of the Industrial Strategy – and the Local Industrial Strategies – with the national Plan for Growth, intended to reflect the post-pandemic economic circumstances. This was followed in 2022 by the Levelling Up white paper setting out how opportunity might be spread more equally across the UK.

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[6] Higgins and Ashton, 'Liverpool City Region Wealth and Wellbeing Programme: Adapting to Covid-19'.
[7] Department for Work and Pensions, 'Jobcentre Guidance on COVID-19 Local Restriction Tiers'.

The Industrial Strategy had a 10 to 20-year time horizon, reflected in the Local Industrial Strategies and offering the potential of long-term funding commitments for programmes such as HiW. Following its withdrawal, the national funding context remains one of repeated competitive bidding rounds, with consequences including duplication between programmes and inability to plan long-term. However, it can also be said that the return to a locally determined economic strategy for Liverpool City Region represented by the 2022 Plan for Prosperity gives more flexibility for employment programmes to develop in line with local needs.

Since emerging from the acute phase of the pandemic, national labour market trends in comparison with the immediate pre-Covid period have been towards lower unemployment but higher economic inactivity.[8] Arguably, in a tight labour market such as at present, those who are furthest from the labour market are even more disadvantaged.

Liverpool City Region has some of the highest economic inactivity and lowest employment rates nationally.[9] In the immediate post-pandemic period its economic inactivity rate reduced, counter to national trends. However, during 2022 economic inactivity increased (to 24%) and the gap with the national average rate (21%) widened again.[10]

In the UK, a person is classed as economically inactive if they are aged 16–64 years, are not in work and are not looking for work. In 2018, across the UK, the most common reason for being economically inactive was being a student (27%), followed by looking after family/home (23%) and being long-term sick (23%). In 2022, the proportion of economic inactivity due to being long-term sick had increased to 27% and it is now the most common reason.[11]

10.3 Funder requirements

Phase 2 was funded by the European Social Fund (ESF) through the European Union Structural Investment Funds (ESIF) Growth Programme for England, under Investment Priority 1.4, Active Inclusion, which had specific objectives:

- To support people with multiple and complex barriers to participation to address these underlying issues and to move closer to or into the labour market
- To engage marginalised individuals and support them to re-engage with education, training, or in employment.

Pre-planning for accessing ESF funding was carried out during Phase 1 and resulted in structural changes to the programme in anticipation of ESF monitoring requirements. For example, it helped with the scoping and specification of the Customer Relationship Management (CRM) system and led to the introduction of policies and plans for environmental sustainability, and equality and diversity.

The programme underwent an ESF audit in October 2022, which it passed with a 0% error rate.

ESF is seen by the HiW programme management team as having a highly positive effect on the programme because of the structure it brought to defining, measuring and reporting, and the extra layer of scrutiny provided by the ESF claims process.

10.4 Organisational change

During Phase 2, a reorganisation within LCRCA resulted in the creation of the People Delivery Board, reflecting an increased focus on programme delivery and performance monitoring activity. Whereas previously, the HiW Programme Manager had reported to the Employment and Skills Board, they now

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[8] Business, Energy and Industrial Strategy Committee, 'Post-Pandemic Economic Growth: UK Labour Markets'.
[9] Liverpool City Region Combined Authority, 'Liverpool City Region Quarterly Economic Update, October 2023'.
[10] Office for National Statistics, 'IDS Datasets: Local Labour Market Indicators'.
[11] Office for National Statistics, 'INAC01 SA: Economic Inactivity by Reason (Seasonally Adjusted)'.

report primarily to the People Delivery Board and are line-managed by the Head of Programmes. Figure 1 in Part A of this report shows the arrangement following this change.

The People Delivery Board is a thematic group brought together to oversee LCRCA programmes with a 'people' focus, e.g. homelessness, employment, skills. It considers performance metrics but also the thematic relationships between these programmes and with wider LCRCA outputs and outcomes, helping to make the strategic links with other LCRCA initiatives such as the Be More platform, Boot Camps scheme and employer brokerage services, and with wider community infrastructure.

The Programme Manager continues to provide reports to the Employment and Skills Board also, since HiW supports LCRCA's strategic priority to see more people in employment and skilled work to meet opportunities in LCR. Both Boards are chaired by portfolio holders who are elected members from constituent councils. The Boards receive reports and may ask for additional information or scrutiny before feeding up to Mayoral level.

The corporate performance monitoring cycle includes a quarterly review of delivery against objectives, as part of which the Programme Manager reports to the Corporate Performance Team which checks that the programme is performing in line with corporate plans and targets.

In 2022, there was a change in programme personnel when the Programme Manager postholder was recruited to another position within the organisation. The vacant post was advertised and a Senior Officer within the existing HiW team was appointed. Changes to team roles are discussed later in this report, with the eventual Phase 2 structure being illustrated by Figure 2 in Part A of this report.

10.5 Phase 1 evaluation

Phase 1 was the subject of two evaluative pieces of work. A qualitative, formative evaluation by the Heseltine Institute focused on the mechanisms by which the programme was leading to improvements and drawing on detailed interviews with client households.[12] This fed into a quantitative, summative evaluation by AMION to understand programme outcomes and impacts, value for money, and the policy and delivery lessons learnt, which made six recommendations:[13]

- Ensuring that there is clear differentiation and alignment with other support
- Continuing to work to embed HiW delivery alongside other local services
- Retaining and developing the advocacy role
- Identifying the right clients for the programme
- Enhancing data sharing protocols and establishing an enhanced LCR-wide CRM
- Ensuring greater consistency across LCR.

11. Programme response (Phase 2)

This section describes how the HiW programme evolved in preparation for and during Phase 2, particularly in response to the contextual changes and lessons learnt that are discussed in Section 10 above. Figure 8 shows the relationship between these drivers for change and the areas for change within the programme, highlighting the key innovations that took place.

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[12] Tyrrell, 'Households into Work: Interim Evaluation of Pilot Programme'.
[13] AMION Consulting, 'Impact Evaluation of the Households into Work Pilot'.

Figure 8: Changes during HiW Phase 2

Programme response and **key innovations**	Drivers for change				
	Covid-19 pandemic	Policy and labour market context	Programme funding	Organisation-al changes	Phase 1 evaluation
Consistency across the city region - **Centralisation of EA role** - **CRM introduced**					✔
Client identification and recruitment - **Pre-registration period introduced** - **Social media**		✔			✔
Team roles - **Partnership and Engagement Officer recruited** - **Pre-loaded payment cards for EAs**				✔	✔
Data and monitoring - **Pathway Star tool in use** - **Matrix Standard achieved**	✔		✔	✔	✔
Links with local services - **Local-level initiatives**	✔	✔			✔
Equality, diversity and sustainability - **Action plans** - **Digital inclusion initiatives**	✔		✔		
Differentiation from and alignment with other support - **Participation in Economies for Healthier Lives research**		✔			✔

11.1 Consistency across Liverpool City Region

The Phase 1 impact evaluation identified some inconsistencies in the way the programme was implemented across the city region, in particular EAs within different local authority teams working to different procedures regarding the use and administration of the household budget and the completion of client records.

There have been two significant changes in Phase 2, intended in part to address this. Firstly, the bringing of the EAs in-house, whereas they were previously co-located with local authority employment teams and using their procedures and systems (see Section 11.3.2). Secondly, the introduction of the CRM (see Section 11.4.1). In addition, the programme management team has been strengthened and now includes posts with specific responsibilities for monitoring and compliance (see Section 11.3).

Centralisation of the EA role should make it easier to shape the overall team to meet the differing needs across the city region, while ensuring that EA performance is managed and monitored in a consistent way. It can be seen (in Figure 13) that Wirral residents were somewhat under-represented on the programme in Phase 2. When we compare this with the Phase 1 situation, we can see that the pattern of unemployment and economic inactivity across the city region has shifted. There have been relative increases in Sefton and Wirral, and while in Sefton the programme has kept up with need – at least in terms of numbers of clients engaged – in Wirral it appears to have fallen behind. The structural changes made during Phase 2 will facilitate any ongoing imbalances to be identified and addressed during Phase 3.

11.2 Client identification and recruitment

The Phase 1 evaluation identified the importance of engaging the right client group from the outset. There have been developments during Phase 2 in the way referrals are handled and in how the programme is communicated.

11.2.1 Referrals

In Phase 1, the four main referral routes were the same (Jobcentre Plus, other organisations, self-referral, client referral), with Jobcentre Plus as the most common. During Phase 2, Jobcentre Plus referrals have been overtaken by those from other organisations (see Figure 5). The programme team has continued to expand its relationships with referral partners through, for example, EA outreach work and the appointment of a Partnership and Engagement Officer. Voluntary sector organisations can play an important role in engaging residents who are unwilling or reluctant to directly approach mainstream services, perhaps due to lack of awareness, confidence, or trust.

Phase 1 demonstrated that it was often challenging to sign up more than one household member to the programme, and so the household definition was relaxed part way through this pilot phase. The impact evaluation also found that, while clients who were supported alongside other clients in their household found the approach helpful, it did not necessarily lead to better outcomes. Then, during the Covid Response Phase when the offer of support was opened to all LCR residents a large number of referrals from single-person households was received. In response to the experiences of these earlier phases, in Phase 2 the programme did not specifically target multiple-client households, although it retained a 'household approach' to providing support, using a flexible definition of household that could encompass a client's close friends and family members even if they lived separately. The high proportion of single-person households in Phase 2 (33%, see Figure 20) suggests that there would be an unmet need had the programme stuck with its initial focus on households with more than one potential client.

During Phase 1, there was feedback from EAs that they would register clients who would turn out to be uninterested in finding work, or so distanced from the labour market that 12 months would be insufficient support. For Phase 2, a pre-registration period was introduced, giving the EAs four weeks from the first meeting with a client, during which they would gather the paperwork needed to support eligibility but also build understanding with the client so as to have a clearer picture of their suitability for the programme. This was reinforced by the addition of an 'Aspiration' section to the registration form, which EAs and clients complete together.

The programme makes a 'referral commitment' – a promise that if a referral is made in to the programme and refused, feedback will be given to the individual and the referral partner on the reason for the refusal. This has helped build credibility between HiW and its referral partners, of which there are many (more than 200 in Phase 2), due to the outreach efforts of the team and the fluidity of the voluntary sector and government partners because of policy changes and time-limited programmes. Furthermore, if the individual engages with an EA but is found to be either ineligible or unsuitable for the programme during the pre-registration period, they will be referred to another organisation or programme that can help them. Figure 9 illustrates this process.

The number of referrals received in each quarter (3-month period) has remained fairly steady throughout Phase 2, as has the proportion accepted (around 45%).

Figure 9: Referral process
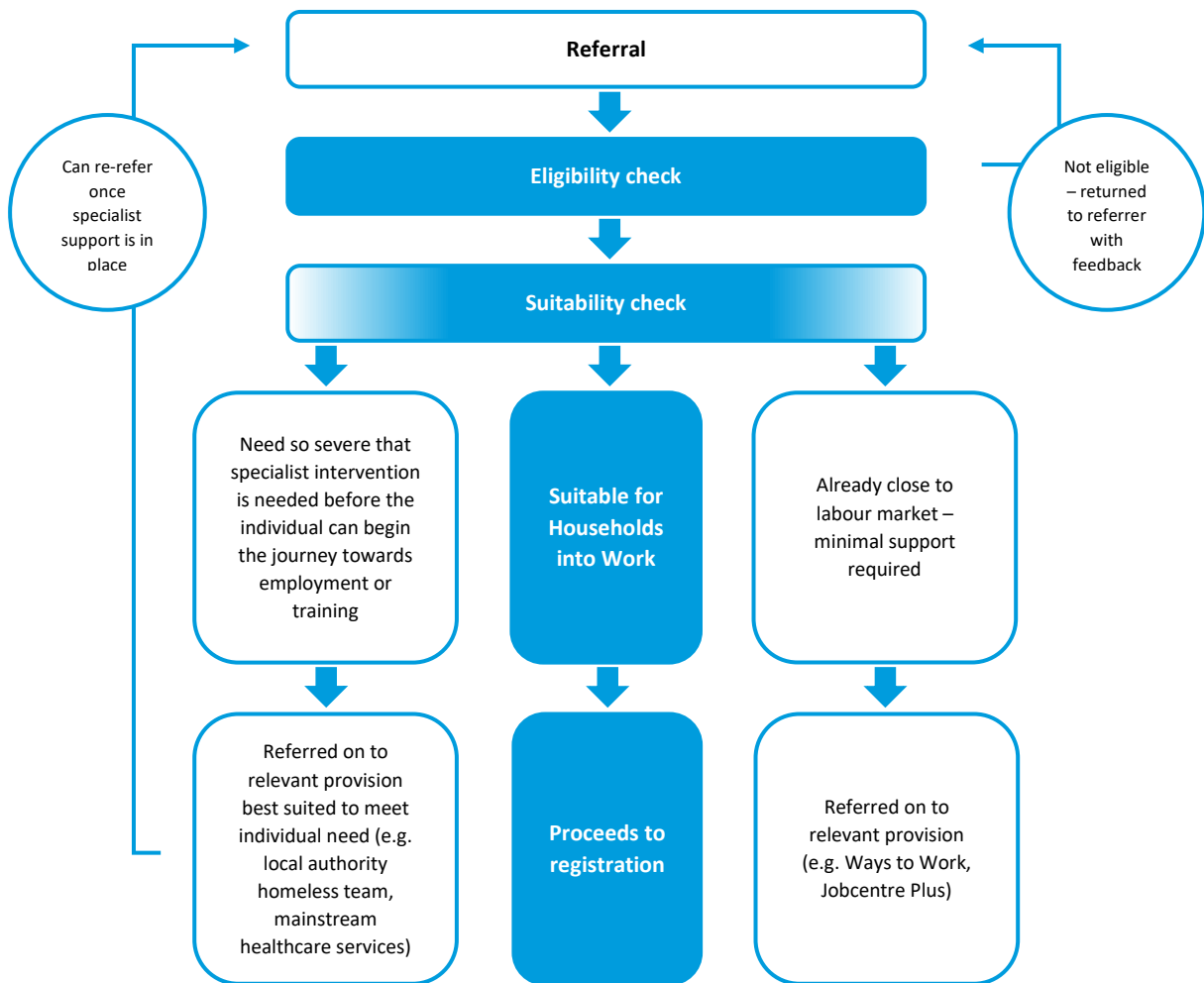
11.2.2 Communications

The Phase 1 impact evaluation noted that 'referrals to the programme were achieved via personal relationships with other organisations rather than formal marketing', but also that the case studies being collected provided 'marketing collateral' able to be used to raise awareness and understanding of the programme with both referral partner organisations and potential clients.

Effective communication helps to address Phase 1 recommendations on continuing to embed HiW programme delivery alongside other local services and identifying the right clients.

In Phase 2, programme communications have been strengthened in various ways:

- **Ongoing development of the programme website** at https://www.liverpoolcityregion-ca.gov.uk/households-into-work
- **Establishment of a Facebook page** at https://www.facebook.com/LCRHouseholdsIntoWork/
- **Production of a series of videos featuring HiW clients and their experiences on the programme** available on the LCRCA YouTube channel at https://www.youtube.com/@lpoolcityregion
- **Continuation and development of a monthly email update to stakeholders**
- **Appointment of a Partnership and Engagement Officer who co-ordinates these activities as well as team building, client and partner feedback, awareness-raising events etc.**

As of February 2024, the Facebook page (started in July 2021) has 370 followers. It is updated multiple times per week with varied and well-presented content providing information about the HiW

programme and a flavour of what it means to take part. Posts are frequently shared by partners and other local organisations, although there may be scope to encourage this further. The email update includes a link to the Facebook page.

The client case study YouTube videos were uploaded to the LCRCA channel in August 2022, with the compilation video 'Households into Work – our impact' having over 500 views to date. They complement other videos on the programme in general and some of its specific initiatives; these might usefully be grouped together as a Households into Work playlist.

11.3 Team roles

The programme team structure is as shown in Figure 2. The central programme management team following Phase 2 comprises five staff, having had three at the outset, and roles have been redefined. Benefits of the expansion include removing some of the administrative burden from the EAs – particularly in relation to funder monitoring requirements – freeing them to focus on supporting clients and building local networks. Outreach has also been strengthened by the addition of the Partnership and Engagement Officer role.

Ending the co-location agreement with local authorities and bringing the EAs fully in-house enabled the rebalancing of EA numbers across the different local authority areas.

Staff are provided with opportunities to progress within their career; for example, during Phase 2, a Senior Officer within the team became the Programme Manager, a Programme Support Officer progressed to being Senior Compliance Officer, Administrator was undertaking a Business Administration Apprenticeship, and an EA became a Team Leader.

An annual team development day takes place in the summer with the aim of enhancing relationships with and between staff who for the most part spend their time out in the community with their respective caseloads.

11.3.1 Partnership and Engagement Officer

A new post of Partnership and Engagement Officer was created in July 2022 to support programme communication with a range of audiences and purposes including:

- HiW team building
- Client and partner feedback
- Awareness-raising among organisations that might refer clients into the programme or to whom clients might be referred for support
- Wider publicity, e.g. through an effective social media presence
- Programme monitoring, e.g. through a monthly update featuring good news stories.

11.3.2 Employment Advocates

During Phase 1, Employment Advocates were funded by LCRCA but based within the local authorities. This arrangement was useful for Phase 1 because it assisted in building local knowledge, and because the CA was a relatively new organisation at the time with little 'brand recognition' among the public.

With the onset of the Covid pandemic, the programme team including the EAs rapidly developed a fully mobile way of working. Whereas previously EAs had called into their respective local authority offices to check in with colleagues and drop off paperwork, they now went directly to meetings and completed documentation online. Client meetings might take place in cafes, libraries or community centres. It became unnecessary (and less cost-effective) for the EAs to have an office base.

In April 2021, the EAs were brought in-house to LCRCA, with information sharing agreements with local authority employment teams remaining in place to assist referrals between programmes. Making

this change facilitated a rebalancing of staffing numbers between the local authority areas and paved the way for the introduction of the CRM, which would have been significantly more complex had there been several different IT and security systems to comply with.

When offices reopened following the Covid lockdowns, the EAs did not revert to being desk-based but retained their more agile approach. It became more client-focused: 'where would you like to meet me?' Outreach was improved as EAs built better networks and a higher profile in localities. This was also driven by the need to provide relevant and accurate, highly localised information during the Covid Response Phase.

EA mobility has been supported by the introduction of the CRM, being an online system, and it has also had a wider impact on their role. In replacing a document-based system it has simplified the process of recording and retrieving client information, and EAs have indicated that they find it easier and more intuitive to use. It has provided them with a tool to manage their caseloads, with built-in prompts when tasks are due, and this facilitates their performance being benchmarked against colleagues and managed by team leaders. It has allowed more flexibility in their interactions with clients; for example, form completion can be paused and returned to later if the person becomes distressed during the conversation, with the information remaining easily accessible but safely stored in the meantime.

Pre-loaded payment cards were rolled out to EAs at the start of Phase 2, enabling greater efficiency and flexibility in agreeing spend against household budgets.

Programme management staff describe the main resource of the HiW programme as the expertise and commitment of its EAs. This is borne out by the responses to the client feedback survey, discussed in Part A, and is emphasised in the Phase 1 evaluations. Following Phase 1, the EA caseload was reduced from 45 to 30 clients in recognition of the value derived from being able to spend time with clients in an unpressured way, and the potential stresses of the role.

Based on a typical month during Phase 2 (September 2022), in any given month, HiW will be supporting around 450 participants who will be at various points in their journey of support with the programme. On average, participants will have 8.5 interactions with their Employment Advocate per month, which might be made up of contact by telephone, message/email or face-to-face; action planning or updates; assistance from the household budget; a progress review using Pathway Star; or referral to another organisation or service for specialist support.

Interactions between programme participants and their Employment Advocate tend to be more frequent in the early stages of their journey as the issues to be resolved are likely to be more numerous or complex. As these issues are dealt with, and through the support of the programme, the participant gains resilience and confidence and the need for such frequent contact reduces.

The EA job description and specification requires a qualification and experience in either information, advice and guidance (IAG) or counselling services. There is an intensive induction process for new EAs covering both corporate and programme policies. The EA dashboard within the CRM provides access to a policy portal and highlights any changes to policies, requiring the user to confirm that they have read the updated information. A programme of mandatory training is in place for EAs including Safeguarding and Prevention, and Equality and Diversity. Other training and support for EAs introduced during Phase 2 includes being issued with lanyard panic buttons as a safety measure, stress management training, and the opportunity to take part in the horticultural training offered to clients through the SucSeed local-level initiative.

The Matrix Standard assessment found that there was a robust approach to performance management and caseload review, with EAs having a good understanding of their contribution to contractual performance indicators. They have frequent meetings with their Team Leaders, who take a proactive approach informed by the performance information provided by the CRM.

Feedback from EAs has helped shape the programme, for example the introduction of the pre-registration period, which gives them time to assess a client's suitability for the programme and make a recommendation as to whether the client is registered. EAs also had instrumental input to the design of the CRM.

11.4 Data and monitoring

Changes were made to several components of programme systems and processes, and how these were used to manage and monitor programme performance, as outlined below. They include the introduction of a Customer Relationship Management system (CRM), which has been transformational.

11.4.1 CRM

The Phase 1 evaluation by AMION noted that 'without a shared CRM system to enable client information to be shared between organisations and ensure that it is recorded in a consistent manner, there has been a need for ad hoc approaches to information sharing, and ongoing resource to be invested in data cleansing and review.' These issues have been addressed by the CRM, combined with bringing the EAs in-house. There remain data sharing agreements between LCRCA and each of the six local authorities, allowing HiW to quickly and easily refer clients to local authority programmes, and vice versa.

The Employment Advocate role is a distinctive feature of HiW, providing one-to-one support to households throughout their time on the programme, assessing needs, connecting services and managing the journey of change. The innovative nature of the role means it can sometimes be difficult for practitioners to benchmark their performance. As this position was newly created, a new set of competencies and metrics against which performance could be measured was required and in response to this, a Workload Analytics Tool was developed and rolled out at the end of Phase 1.

At the same time, the programme management team was preparing for the transition to ESF funding and the associated monitoring requirements. This resulted in structural changes to the programme to enable the necessary data to be collected and was invaluable in the scoping and specification of the online CRM that was subsequently introduced.

The CRM was an ambition from the start of Phase 2 and was operational from November 2021 having been around a year in development. The HiW team worked with Homeless Link to create the system, known as InForm, basing it on a CRM that Homeless Link had previously built for the LCRCA Housing First initiative, but tailoring it to the precise needs of HiW.

The relationship with Homeless Link and its flexibility as a small organisation means that further adjustments to the system are straightforward to make, although certain system development principles are kept in mind; for example, considering the impact on the EAs in their use of the system and maximising the ability to compare data year on year.

The CRM is now the home for all client information and many of the programme processes, as well as providing a performance management tool for EAs and team leaders. A wide range of output and outcome reports can be produced to support funding claims and internal LCRCA reporting.

Programme management, team leaders and EAs each have their own dashboards appropriate to their tasks and caseload. When a client referral first comes in to a team leader, they create an entry on the system, logging the date the referral was received, its allocation to an EA, and when registration is due. This then appears on the EA's home screen as part of their caseload. The EA completes the registration form and Pathway Stars within the CRM, keeping a contact log of all the interactions with their clients and adding notes where appropriate, which might include flagging client contact preferences or any known risks that might be relevant to client or EA protection. Because the CRM is

cloud-based it can be used on a mobile or tablet, and client email addresses and phone numbers are hyperlinked so that EAs can easily initiate contact from within the system.

The ESF pre-planning period was influential in developing the CRM. During this time, a data collection and reporting structure was created to meet ESF requirements using a system of spreadsheets and paper-based documentation, which then moved fully online during the Covid pandemic. When the CRM was introduced, it essentially replicated this system so there was already familiarity among the EAs, who were then supported with user guides and training sessions to transition to the CRM. In other words, the change to ESF funding had the effect of focusing the scope and specification of the CRM. It did restrict further development of the CRM during Phase 2 to minor enhancements that would not necessitate an ESF change order, but feedback from Phase 2 was incorporated into the version of the CRM in use for Phase 3.

11.4.2 Pathway Star

Pathway Star was developed and tested with Triangle Consulting during Phase 1 and finalised for the beginning of Phase 2. It is now available as a product that anyone can buy a licence for.[14]

Prior to Phase 2, there was an expectation that a star would be completed every eight weeks but the timing of the first star was not stipulated. Phase 2 saw the introduction of a 4-week pre-registration period and it is now a requirement that the first star is completed during that time, to set a baseline for future measurement. With the first star, the EA is aiming to 'paint a picture' of the prospective client's circumstances through the lens of what is limiting them in moving towards employment; for example, a higher debt with an agreed payment plan in place might be less of a barrier to work than a lower debt with a loan shark that is causing considerable anxiety. The EAs are also trained not to look to score everything low simply because a client is at the outset of their journey on the programme; there may be areas where they are not experiencing difficulties affecting their ability or capacity to look for work.

During Phase 2, stars were due every 6 weeks (more frequently than Phase 1). The initial star is supported with a detailed narrative completed in the CRM by the EA, who then adds notes to explain the reasons behind movement ('steps') in subsequent stars. The final star is completed within the 4 weeks prior to a client's end date on the programme.

The programme Senior Compliance Officer and Team Leaders are trained as 'super-users' in Pathway Star so that they can oversee its use, checking that it is being used correctly and consistency. To retain super-user status, they are required to undertake annual training to a specified number of hours.

Most EAs come to the role with some experience of this type of tool, although processes may vary; for example, the Ways to Work programme uses the Work Star.

The CRM assists EAs in managing Pathway Star completion: they each have an individual dashboard that shows when stars are due and provides reminders. The EA dashboard was designed in collaboration with the EAs.

11.4.3 Matrix Standard

When the Employment Advocates were brought in-house, a decision was taken to apply for the Matrix Standard for the programme, since this was held by each of the local authority teams with which the EAs had previously been co-located.

The Matrix Standard is owned by the Department for Education and delivered locally by the Growth Company. Introduced in 2002, it offers a quality assurance framework for information, advice and guidance (IAG) services. Its purpose is to assess and improve the quality of organisations that offer

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[14] Triangle, 'Pathway Star'.

career guidance, employability support and related services, ensuring they have robust systems in place to meet the needs of their clients.[15]

The initial Matrix assessment of HiW took place in September 2021 and was passed. A 'continuous improvement check' was passed in September 2022 and further checks will take place annually.

11.4.4 Client feedback

A client feedback process was set up towards the tail end of Phase 1, prompted by the aim of achieving the Matrix Standard and with the main purpose of providing an additional performance monitoring tool. A text with a link to an anonymous survey is sent to all clients once they reach the three-month point on HiW. This is repeated every few months during their time on the programme, and on completion.

Each quarter, the Partnership and Engagement Officer collates the data by area for sharing with the respective Team Leaders and with programme management.

There were 479 responses to the survey during Phase 2. It is not possible to say how many clients this represents, since each client may complete the survey multiple times and it is anonymous. However, there is a spread of responses across the six local authority areas and at different stages of the programme. Of those responses:

- 99% agreed with the statement 'I found my Advocate helpful and supportive'
- 98% agreed with the statement 'I was happy with the frequency of contact'
- 91% agreed with the statement 'The approach and support I received was different to any other programme I have done before'
- 79% of responses from those who went into employment agreed with the statement 'My Advocate was a positive factor in me gaining employment'.

These were the questions relating to the way the programme was delivered. Part A of this report contains a discussion of the outcome data provided by the survey.

11.4.5 Case studies

Case studies can be useful for getting a richer picture of how the programme can impact on an individual. The CRM facilitates the compilation of case studies as it a simple process for an EA to run a report that provides a timeline of all the interactions with a particular client. A standardised form has been produced so that they can translate this timeline into an anonymised summary that sets out the client's situation on referral, key aspects of how they and the EA have worked together during their time on the programme, and their situation on completing the programme. These anonymised case study reports have been used to create the client journey maps at Appendix 2.

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[15] Matrix Standard, 'Matrix Standard'.

11.5   Links with other local services

The Phase 1 evaluation highlighted the importance of continuing to embed HiW delivery alongside other local services. The crucial role of neighbourhood-based groups and organisations was also emphasised by the experiences of the Covid pandemic. The HiW programme responded by further strengthening local networks and developing its own local-level initiatives. See Sections 11.2 and 11.7 for more specific discussion of the links with referral organisations, including other employment support provision.

11.5.1   Building local networks

During the Covid Response Phase, the EAs carried out welfare checks on previous clients. They wanted to make sure people knew what support was available to them locally, and they were also able to combat misinformation, for example myths around lockdown regulations. The team found that this process greatly increased their knowledge of local services. Not all EAs took part in this work because some were volunteering for other, local authority led Covid support initiatives and this also contributed to organic growth of networks.

These pandemic experiences highlighted the importance of securing tailored, neighbourhood-based support for clients, and led to an increased emphasis on network-building within the EA role in Phase 2. EAs are expected to keep their ear to the ground for changes in the services available within their areas and to establish relationships with relevant organisations. In the limited, 12-month time available, they aim to build sufficient resilience within their clients that they can continue their journey towards or within employment without setbacks, and community support is seen as an important part of this.

Anecdotally, Phase 2 has seen EAs referring to and leveraging support from a greater number of existing organisations, leading to a reduction in household budget expenditure, and this has been enabled by broader and stronger networks.

A Partnership and Engagement Officer has been added to the programme management team, which is a communications role encompassing awareness-raising among organisations that might refer clients into the programme or to whom clients might be referred for support.

11.5.2   Local-level initiatives

Self-reported incidence of mental health issues is high among HiW clients, and more so since the Covid pandemic. In response to this, several 'local-level initiatives' have been developed to tackle issues such as isolation and poor mental health and to improve physical and emotional wellbeing. These are designed to bring together clients who are experiencing similar issues, in an informal setting. They include:

- Pebble in the Pond (Knowsley) – an informal group which met over the course of 12 weeks and discussed coping mechanisms and confidence building whilst also looking at some employability skills
- Walk Your Way (St Helens) – a fortnightly walking group with walks designed and led by participants, fostering confidence and a sense of responsibility; Employment Advocates attend the walks and conduct their regular appointments in a 'walk and talk' setting
- SucSeed (Knowsley) and Halton Gardening Group – bringing participants together at local allotments where they can learn transferrable skills and benefit from being outside; recent work has been undertaken to link with a local training provider so that clients can complete a qualification in Horticulture.

Employment Advocates have observed that these initiatives foster not only individual resilience but 'community resilience', as clients build support networks.

> **Case study: community resilience**
>
> One week, one of the local group regulars failed to attend after confirming that he would. He messaged the rest of the group to apologise and to explain that he had, in his words, 'messed up' by having a drink, having a history of alcohol misuse. The group responded with messages of support, one group member sharing that they had been in the same situation previously. The group encouraged him to be positive, saying that if he could continue on his path of so many good days and so few bad days, then he would be doing brilliantly. A few members of the group decided to meet at the weekend and encouraged this person to also attend. They arranged to meet for a cup of tea and a chat. This was the beginning of these members forming a splinter group, a positive development as it meant they had created a self-sufficient support network able to last beyond their time on the programme.

11.6   Equality, diversity and sustainability

While the programme has always operated in line with LCRCA policies relating to equality and diversity, as well as environmental sustainability, the move to ESF funding introduced an extra layer of scrutiny in these areas, beginning with the requirement to produce programme-level policies and plans. Programme management staff found that this exercise along with other elements of ESF pre-planning provided a useful framework for honing programme operation.

11.6.1   Equality and Diversity Action Plan

The Equality and Diversity Action Plan sets out objectives and actions including in relation to:

- Ensuring that the programme is accessible to all eligible LCR residents
- Tailoring support to individual needs
- Promoting awareness of relevant policies

As part of the Action Plan, and enabled by the CRM, the programme has monitored referrals from groups that were felt to be at risk of under-representation on the programme such as women, people from ethnic minority groups, people with disabilities, and people with childcare responsibilities. An equity audit of the programme is being undertaken as part of Economies for Healthier Lives, a collaboration between LCRCA, the University of Liverpool, Liverpool John Moores University, the city region's six local authorities and public health departments, and Jobcentre Plus. The research will use anonymised CRM data and compare with census data to understand whether different groups are proportionately represented on the programme and whether they experience different outcomes.

11.6.2   Sustainable Development Plan

The objectives and planned actions of the Sustainable Development Plan cover, for example:

- Minimising waste and energy consumption
- Minimising travel and using 'green transport' where possible
- Promoting awareness of relevant policies

An area where this resulted in change during Phase 2 was printing and paper use. Considering environmental sustainability issues as part of the ESF pre-planning process highlighted that the introduction of the CRM would present an opportunity to consolidate the move to paperless processes begun during the pandemic.

There was a tangible result in that, where Phase 1 resulted in 44 archive boxes of paper, Phase 2 generated only four.

11.6.3 Digital inclusion

Alongside the Action Plans, liaison with other LCRCA teams has given rise to targeted opportunities such as the digital inclusion work described below, and an active travel initiative discussed in a later section.

The programme team has collaborated with colleagues in LCRCA's Digital Inclusion team to assess and address digital exclusion among clients. LCRCA considers digital connectivity to be 'critical infrastructure…facilitating the ability to learn, work, shop and socialise, as well as providing access to vital public information and services.'[16] A survey of 260 current HiW clients was undertaken between November 2022 and January 2023, by means of face-to-face interviews with Employment Advocates. Interim results (from December 2022) included:

- 84% stated that being online was important to them
- 55% stated they had a disability
- 55% stated that cost was the main barrier to using the internet more
- 20% stated that [lack of] confidence was a barrier to using the internet more
- 13% had no internet access at all
- 8% had no access to an internet-ready device at home
- Of those with no internet access, 44% were classed as disabled
- Of those with no internet access, 100% stated that cost was the main barrier.

HiW has also made changes to its CRM to enable information about an individual's digital connectivity and skills to be collected upon registration. This means that the Digital Inclusion team will have access to data moving forward without the need to consider surveys (which has already enabled targeted LCRCA digital inclusion support for HiW clients during Phase 3).

Between September 2020 and March 2021, the HiW team worked collaboratively with Jobcentre Plus on the delivery of Pathways to Work, which provided over 280 eligible people with a laptop, desk, chair and 2 months of broadband. Further digital inclusion initiatives have taken place during Phase 3 of the programme (see Section 12).

11.7 Differentiation from and alignment with other support

The LCRCA Skills Strategy 2018–2023 set a target of a higher percentage of the city region's working age population in employment, and a higher percentage of those in employment being in good quality jobs. It was in this context that HiW was launched, and it has been a key element of each of the subsequent annual skills action plans. In the LCRCA Skills Action Plan 2022–23, other support aimed at those furthest from the labour market included:

- **Ways to Work** – This programme has operated throughout the city region since 2016, delivered by each of the local authorities and coordinated by LCRCA. It assists participants aged 16 and above to access services and support to address challenges impacting on their ability to work or seek work, helping them to move into or towards sustainable employment by providing personalised, case-managed advice and practical support including financial support where necessary.[17]

- **Restart Scheme** – The Restart Scheme was announced by DWP in 2020 to help more than a million people across the country who were unable to find work as a direct impact of the pandemic. Referrals are over a three-year period beginning in July 2021 with an initial focus on those who had been on Universal Credit for between 12 and 18 months, subsequently expanded to a wider range of claimants. The scheme provides up to 12 months' tailored support for each

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[16] Liverpool City Region Combined Authority, 'Liverpool City Region Digital Strategy 2021-2023'.
[17] Centrifuge, 'Evaluation of Ways to Work: Liverpool City Region, Final Report'.

participant, aiming to break down employment barriers, and is delivered in the North West by G4S.[18]

- **New Horizons** – Funded by ESF from 2020–2023 and delivered by a local consortium led by The Women's Organisation, New Horizons offers support to those living in LCR who experience specific and multiple barriers accessing job search, training and education opportunities that enable them to compete effectively in the employment market. Specialist advisers take a person-centred approach in offering advice, training and support. The focus is on accessibility for BAME communities, those with a disability or long-term health condition and those with socio-economic barriers.[19]

Since these initiatives are related in their aims and, in the case of the first three, are undertaking similar activity, they are potentially targeting the same clients. Not included in the Skills Action Plan 2022–23 but also operating in a similar space during that time have been:

- **Work and Health Programme** – One element of a 10-year, national programme of change to see one million more disabled people in work by 2027, the Work and Health Programme is commissioned by DWP and delivered in the North West by two providers: Ingeus and the Growth Company. It provides participants with up to 15 months of personalised support, which may be extended for a further 6 months to provide in-work support. While its primary focus is on disabled people, it is also a voluntary option for other priority groups. Prior to the introduction of Restart in 2020, it received mandatory referrals for people who were long-term unemployed.[20]

- **Supporting Families** – Previously known as the Troubled Families programme, Supporting Families is a £165 million programme announced by government in 2021, working to support people to leave abusive relationships, get the right joined-up support for those with mental health issues and help people to find work. Families are assigned a dedicated keyworker, who works with every member of the family and brings local services together to resolve issues at an early stage, before they develop into more significant problems.[21]

- **Directions** – Funded by ESF and beginning in 2019, Directions was a partnership of 15 local organisations working collaboratively to tackle the diverse issues faced by women, people from BAME backgrounds, and those living with disability across Liverpool City Region, and to support them to explore and build pathways to employment.[22]

- **Talent Match Plus** – Talent Match started in 2015 and was initially a five-year National Lottery funded programme in 21 areas across England to help young people along the path to sustainable employment.[23] The Liverpool City Region scheme was led by Merseyside Youth Association and provided bespoke mentor support to young people aged 16–29 who had been out of education, employment or training for at least a year. It continued until 2023 with funding from ESF and the Youth Futures Foundation.[24]

The timelines for the above-listed programmes are illustrated by Figure 10, which is indicative of the context for HiW but not comprehensive; there will be other employment support activity within LCR. It also does not necessarily indicate an increase in activity, because new programmes may be a replacement for similar provision that has ended. For example, the Work and Health Programme replaced the Work Programme (2011–2017), and Supporting Families replaced Troubled Families

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[18] Department for Work and Pensions, 'How the Restart Scheme Will Work'.
[19] The Women's Organisation, 'New Horizons'.
[20] Department for Work and Pensions, 'Work and Health Programme Evaluation'.
[21] Ministry of Housing, Communities and Local Government, 'Next Phase of £165 Million Programme for Vulnerable Families Launched'.
[22] The Women's Organisation, 'Directions'.
[23] The National Lottery Community Fund, 'Talent Match'.
[24] Merseyside Youth Association, 'MYA Talent Match'.

(2012–2021). Similarly, the ESF funding for New Horizons has now come to an end, but LCRCA is in the process of commissioning new 'community-led employment support' to be funded by UKSPF.[25]

In 2023, as part of the Spring Budget, the Government announced a £2 billion package of measures to target the biggest economically inactive group: disabled people and people with long-term health conditions. New programmes include:

- **WorkWell** – Launched by DWP and the Department for Health and Social Care to address 'the rising flow of people out of work', WorkWell will support sick or disabled people to start, stay and succeed in work through integrated work and health support. Integrated Care Boards, in partnership with local authorities and local Jobcentre networks, are able to bid for funding to design and deliver a local pilot programme responding to population needs. Individuals will be referred to WorkWell through their employer, local services within their area, primary care providers such as GPs, Jobcentre Plus or themselves through self-referral.[26]

- **Universal Support** – There are two strands to the first phase of the Universal Support programmes, beginning September 2023: 1) Pioneer, a new element to the Work and Health Programme providing work placements and wraparound support from a personal adviser; 2) Individual Placement and Support in Primary Care (IPSPC), providing employment support to people with mild to moderate mental or physical health conditions who will be referred to the service by healthcare professionals such as GPs and practice nurses and will receive employment support and advice integrated with their normal health treatment.[27]

Figure 10: Concurrent employment support programmes for adults in LCR
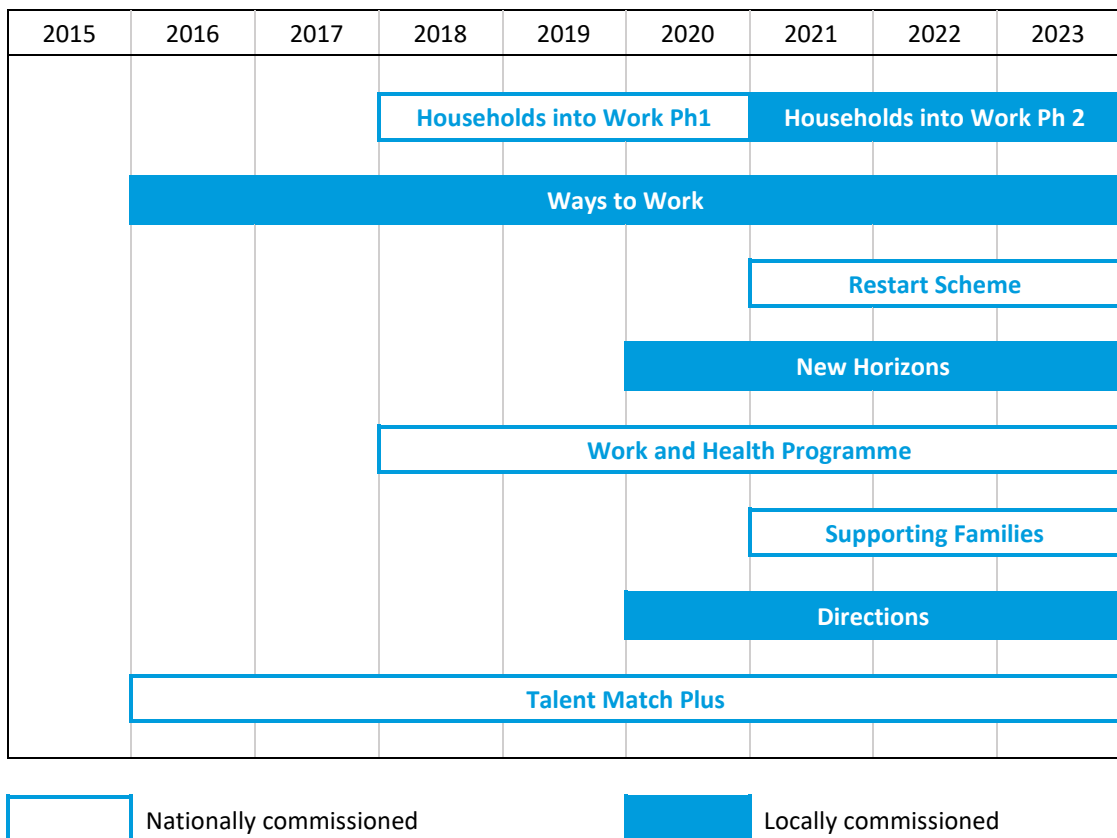
[25] Liverpool City Region Combined Authority, 'UKSPF Community-Led Employment Support'.
[26] Department for Work and Pensions and Department of Health and Social Care, 'Guidance: WorkWell'.
[27] Department for Work and Pensions, 'Press Release: 25,000 People to Be Helped into Work as Government Ramps up Roll-out of Flagship Universal Support Scheme'.

It remains a crowded field, as it was when the Phase 1 impact evaluation raised a concern regarding 'the blurred lines between these programmes, and whether clients with similar needs are directed to different programmes and therefore being provided with inappropriate levels of support.' In a similar vein, the Matrix Standard assessment noted that the HiW conversion rate of referrals to registrations was relatively low at 45%, mainly due to individuals being referred to the programme who were either already considered job-ready, or who were at the other end of the scale, i.e. too far from being job-ready.

While the original household focus of HiW was a distinctive factor, it necessarily evolved into something broader during Phase 1 and the programme sought instead to differentiate itself by the intensity and duration of support, and the emphasis on outreach and advocacy. These continued to be key features throughout Phase 2; however, other concurrent programmes made similar claims.

HiW is structured to allow EAs to spend quality time with each client. Each EA has a caseload of 30 clients and, as long as overall employment targets are met, they are free to focus on resilience outcomes in a way that is client-led and without pressure. This flexibility has been enhanced during Phase 2 by a reduction in caseload (from 45) and the more mobile way of working facilitated by the introduction of the online CRM. The EA's aim is not necessarily to get a client into work during their time on the programme, but to get them to a point where they feel ready to look for work. This is an important principle in understanding the contribution of HiW within the wider landscape. For example, Ways to Work is geared towards employability – providing CV advice, work placements and so on. Some HiW clients are referred on to Ways to Work at the end of their 12 months on the programme, as the next logical step in their journey. Other clients are readily employable when they join HiW, but need help with stabilising their situation before they can look for work. Restart was formed to support economic recovery post-Covid and within Liverpool City Region it initially took clients who would likely otherwise have been referred to HiW. However, Restart is unable to provide the same level of support as HiW and now refers clients to HiW in some cases where there are more complex needs. This happens on a mainly ad hoc basis due to good relationships between the respective team leaders, and there may be scope to similarly strengthen links with Ways to Work to promote referrals in as well as out.

The HiW team has a clear understanding of who its clients are and how it can help them. People who meet the eligibility criteria are suitable clients if they have issues that are preventing them from seeking work and are beyond simple employability issues but not so overwhelming that they require specialist intervention first and foremost, e.g. from homelessness or addiction teams. The programme offers tailored support to clients to help them stabilise or improve these issues so that they can move towards a point where they feel able to look for work.

However, there was for Phase 2 (and continues to be) no explicit, consistent statement of programme objectives. Having evolved from its initial proposition, the programme would benefit from clarifying its offer, particularly in relation to other programmes. This would support the further development of the work that has already taken place to strengthen programme communications and would assist those making strategic decisions about employment support in the city region – because balancing the overall provision to minimise duplication goes beyond what can be done at programme level. In this respect it is useful that the programme continues to provide updates to the LCRCA Employment and Skills Board through the relevant Policy Lead, even though its primary reporting line is now within the delivery function of LCRCA.

When considering how best to frame the programme, it will be instructive to consider client experiences particularly in relation to other support they may have received or been offered. The client feedback survey developed during Phase 2 is a useful source of information. Of the responses received from Phase 2 clients (some of whom will have completed the survey multiple times as they progressed through the programme), 91% agreed with the statement 'The approach and support I received was different to any other programme I have done before'. More weight could be added to

this by including a further question to understand which responses came from clients who had previously participated in a similar programme. Client comments included:

"I have only been on programme for a few weeks but I can honestly say that I have never had this level of support from anyone else."

"I have only just started working with [my Advocate] but the level of compassion that she has shown to myself and my daughter has been wonderful…This isn't something we have experienced before…"

"The level of support is exceptional, it really does make a difference..."

"[My Advocate] listened to me when no-one else did."

In December 2022, two HiW clients took part in ARCFEST, an event bringing together health and social care providers, NHS commissioners, local authorities, public advisers and the Innovation Agency, to learn more about health inequalities, with the aim of overcoming barriers to translating research into practice. The event was focused on mental wellbeing and the HiW clients were on a panel organised by Economies for Healthier Lives to discuss employment support programmes for people with health issues. This allowed the audience to hear first-hand about the challenges people face in their day-to-day lives and how services like HiW can help them address those challenges. It also helped inform EHL research plans.

12. Further development (Phase 3 and beyond)

The HiW programme is now in its third phase and continues to be developed and refined. Recent innovations include:

- **Performance indicators** – Monitoring now refers to 'journey measures' (Pathway Star, skills development, work-related activities and job search) and 'destination measures' (employment, education or training outcomes) to better reflect the main purpose of HiW, i.e. to help people who, although willing, are not yet able or ready to seek employment. Journey and employment measures have targets attached, both overall and for individual EAs. Destination measure targets are no longer split between unemployed and economically inactive.

- **Data** – A series of dashboards has been created within the CRM and will be shared with LCRCA research teams to provide insight to the demographics of HiW clients.

- **Digital inclusion** – Based on the results of the survey during Phase 2, programme participants have been able to access repurposed LCRCA mobile phones and SIM cards pre-loaded with texts, calls and data. A further initiative with Lloyds Bank Academy and partners including Vodafone has seen 50 programme participants identified to receive a free package including a tablet, a mobile phone and associated training and advice, and there are plans for future cohorts beyond this initial group.

- **Active travel** – The programme team has worked with LCRCA's Active Travel team to provide items such as bikes, bike locks, helmets, walking boots, waterproofs and rollerblades to HiW households using money from the Government's Capability Fund, a revenue grant supporting local transport authorities to enable 'walking, wheeling and cycling' in their areas.[28] This is in recognition of the potential health and wellbeing benefits of these activities, as well as to encourage programme participants to use sustainable modes of travel, whether for work or other purposes.

- **Student nurse placements** – LCRCA's Housing First team originally arranged placements for second year nursing students from Liverpool John Moores University so that they could observe

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[28] Active Travel England, 'Capability Fund 2022 to 2023'.

the barriers Housing First participants were facing with accessing key services, with the aim that in the future when the nurses meet homeless people in healthcare settings, they will have a better understanding of their circumstances. These placements now incorporate three days spent with HiW Employment Advocates.

Some of the initiatives proposed or in the pipeline are:

- **Data** – There are potential wider uses of anonymised HiW data, e.g. in bus reform plans. Other teams have approached HiW as a way to access data on a traditionally hard-to-reach group, and the CRM facilitates this by enabling accurate collection, presentational options, and secure sharing.

- **Paramedic placements** – The HiW team is planning to trial a placement scheme for student paramedics from LJMU, based on the existing student nurse placements.

- **Quality assurance** – The shift to ESF funding for Phase 2 required a tight focus on compliance, which resulted in new systems and standards being introduced to the programme. These have been consolidated during Phase 3 and the lens is now one of continual improvement – remaining open to scrutiny and to further adjustments that can create a better service. The annual Matrix Standard checks provide the framework for this.

- **Mental health** – Very high incidence of poor mental health among clients has been noted throughout all phases of the programme and the management team is considering whether more detail can be collected at registration as a way of better understanding the types of mental health issues clients are facing and how these might be addressed both by the programme and more widely.

- **Lived experience** – LCRCA has established a Lived Experience Group through which people with lived experience of homelessness have direct input to related policy design and implementation, and is considering how this might be expanded to influence other policy by including a broader range of voices.

- **Funding** – Phase 3 runs until the end of March 2024, and beyond this the Government's Shared Prosperity Fund (UKSPF) is a potential funding source. Pre-planning for this has begun, and may lead to adjustments in programme monitoring to meet UKSPF reporting requirements. The flexibility to do this without major impact on the EAs is one of the benefits of the CRM.

Figure 11: Gardening group for HiW clients in Knowsley

Part D:
Conclusions and recommendations

13. Conclusions

This evaluation has considered the outcomes of HiW Phase 2 and the processes by which it has achieved them, with a particular focus on how the programme has been adapted and developed during Phase 2 to respond to contextual changes and lessons learnt. This concluding section presents the key findings, which are all interlinked but are summarised as:

- **Achievements – beneficial, well-managed, responsive**
- **Key features – locally designed, community-based, person-centred**
- **Reflections – complex needs, the value of data, programme alignment.**

13.1 Achievements

13.1.1 Beneficial

The HiW programme was successful in meeting or exceeding its Phase 2 targets. These were targets set as part of the ESF funding agreement and consisted of output targets relating to the numbers of beneficiaries in total and from specific disadvantaged groups, and result targets relating to the numbers of beneficiaries moving on to employment, education, training or job search.

Achievements against these quantifiable targets is recorded, evidenced and reported in accordance with strict ESF requirements. The programme systems were improved so as to be compliant, with the introduction of the CRM having a transformational effect in several areas including, for example, performance management and continual improvement. The CRM enables collection and analysis of quantitative data over and above that required for funding purposes. For example, an equity audit being carried out as part of the Economies for Healthier Lives initiative will use CRM data to investigate the outcomes of different HiW client groups.

The quantitative evidence is supported by qualitative data from case studies and responses to a regular client feedback survey. This provides an important additional dimension: while the hoped-for long-term impact of HiW is more LCR residents in employment, its client cohort is people who are facing one or more issues that are barriers to them seeking or sustaining employment, and its main aim is to help them address those issues so that they can begin to consider looking for work. The barriers faced tend to be multiple and complex, and their interaction and impact are highly individual.

Pathway Star offers a way of measuring the individual client journey – of quantifying the quality of change, by considering different areas of life and defining stages of progress. The information it provides can then be aggregated across the programme, which makes it possible to say that Phase 2 clients on average saw improvements in all eight of the areas covered (i.e. skills, stability at home, money, healthy lifestyle, emotional wellbeing, family and relationships, friends and connections, confidence and aspirations).

From Phase 3 onwards, 'journey measures' such as Pathway Star progress and skills-development activities will have targets attached, alongside the 'destination measures' of employment, education and training outcomes.

While it can be said that the programme has achieved its targets, it is more difficult to say how well it compares with other interventions or indeed with no intervention. Construction of a comparison group using DWP data was an intended strand of the Phase 1 impact evaluation but did not go ahead

due to lack of DWP capacity at the time. However, in 2022, DWP launched the Employment Data Lab, which does offer this service. It could be utilised in future HiW phases to assess the extent to which HiW assisted clients to achieve better outcomes than individuals with similar characteristics who did not participate in the programme. This in turn would assist in target setting for subsequent phases.

The Employment Data Lab is able to examine labour market outcomes at 6, 12, 18 and 24 months. Since HiW is about more than just labour market outcomes – the journey as well as the destination – other data sources such as those already used would still be necessary to tell the whole story of its impact, but information about the sustainability of destination outcomes would be valuable additional information.

13.1.2 Well-managed

The HiW programme has an established team, which appears cohesive and engaged. The programme management function is well-resourced, minimising the administrative burden on EAs and enabling compliance, continual improvement and effective communication. It operates within a corporate governance structure that provides both strategic and operational oversight. During Phase 2, the programme passed an ESF audit with a 0% error rate and achieved Matrix Standard accreditation for its information, advice and guidance service. The team recognises that external scrutiny from funders, evaluators and assessors (such as the Matrix Standard) can be to the benefit of the programme.

Staff are subject to the corporate policies and procedures of LCRCA and have a suite of HiW-specific documentation to guide their day-to-day work. There is a programme of mandatory and supplementary training in place. A frontline role such as that of an EA, working with people facing some quite severe difficulties, has a particular set of stresses and strains attached. There are measures in place to monitor and manage the pressures on EAs; for example, stress management has been added to the EA training programme. Interviews with EAs have not formed part of this evaluation but will be carried out as part of the 3-yearly Matrix assessment and might also be included within any Phase 3 evaluation to help understand how they can best be supported.

With the introduction of the CRM, each member of the team has quick and easy access to programme information that is relevant to their role. This is beneficial for EAs in managing their caseloads, for Team Leaders in managing EA performance and for the programme management team in monitoring and shaping the overall programme. It also facilitates provision of specific, accurate information to external parties such as funders and researchers, whether for programme compliance purposes or to contribute to wider policy development.

13.1.3 Responsive

This evaluation has traced how the HiW programme has evolved during Phase 2 in response to changes such as the Covid pandemic, subsequent developments in the labour market and relevant policy, different corporate governance structures and a new funder, as well as to lessons learnt during and since the pilot phase.

Some of the programme changes have been significant in their impact on working practices, such as the introduction of the CRM, and EAs no longer being office-based. Some have been very much led by client needs, such as the addition of group activities in some locations – the local-level initiatives – and the redefining of the household focus to be more inclusive of different types of household while retaining the holistic consideration of each client's situation.

The agile way in which the programme has been able to continually adapt and refine its operation can be attributed to being designed and delivered at local (city region) level rather than being part of a nationally defined and regulated programme, which is discussed further below, and to the way it has been managed, as outlined above.

Ongoing continual improvement will be supported by systems and processes that have been established during Phase 2, including the CRM, the Matrix Standard, and the client feedback survey.

13.2 Key features

13.2.1 Locally designed

Employment support provision nationally is a mixed bag of centralised and localised. The majority of DWP's employment support schemes are centrally designed and nationally contracted.[29] The Work and Health Programme is mostly centralised, being delivered across England and Wales to the same design except for selected areas where designated Local Government Partners were allowed to manage their own contracts. Meanwhile, the DWP and LCRCA-funded HiW Phase 1 was one of five pilots designed locally by combined authorities to address their specific priorities within the overall aim of helping disadvantaged jobseekers overcome barriers to work.

ESF is one of the European Social Investment Funds and was available to UK employment support programmes seeking new funding until the end of 2021. It was used to match DWP funding for national programmes, e.g. the Work and Health Programme, but also provided an opportunity for supplementary localised provision, e.g. HiW Phase 2, providing it aligned with ESF priorities and could deliver ESF-specified results.

Being locally designed has meant that HiW has been tailored to local issues (such as comparatively high levels of ill health) while making the most of local knowledge, expertise, networks and other opportunities. These are the type of advantages cited by the House of Commons Work and Pensions Committee in recommending that DWP should, as standard, devolve all future employment support programmes.[30] It has also afforded flexibility: the freedom from rigid central policies and procedures has enabled it to be responsive to change and feedback.[31]

13.2.2 Community-based

From the outset of the pilot, HiW has looked to tap into existing local networks in order to engage clients and match them up with appropriate support. This aspect of the programme has only been strengthened over the course of Phase 2.

EAs have moved out of the office and now work on a community-based hybrid model, meeting clients in locations like cafes, libraries and community centres, and keeping records using the online CRM. The EA job description includes, as primary responsibilities, to generate appropriate referrals within local areas through developing and maintaining relationships with key partners, stakeholders and providers of services, and to work alongside other organisations to tackle a range of issues in order to facilitate support for participants.

A new role of Partnership and Engagement Officer has been created to enhance programme communications in general, including with potential clients, referral organisations and support providers, and part of which is to facilitate publicity and awareness-raising events across LCR.

Furthermore, an understanding has developed of the importance of community resilience: the idea that individual resilience can be boosted by positive social relationships, and that a resilient community is one that can collectively support its individual members. To this end, various local-level initiatives have been developed during Phase 2, designed to bring together clients who are experiencing similar issues – often related to isolation and poor mental health – in an informal setting such as a walking or gardening group, to help them build their own support networks.

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[29] House of Commons Work and Pensions Committee, 'Plan for Jobs and Employment Support'.
[30] House of Commons Work and Pensions Committee.
[31] Jarvis, 'Learning from What Works: How Mayoral Combined Authorities Are Tackling Long-Term Unemployment'.

13.2.3 Person-centred

Perhaps the most defining feature of HiW is the nature of the support offered by the EAs. This was a theme of both Phase 1 evaluations, which drew on client and EA interviews, and has continued to come through strongly in relation to Phase 2, via the client feedback survey in particular. There are many client comments praising the skills and attributes of the EAs – their knowledge, flexibility, patience and kindness – and suggesting that the relationship with the EA was central to client achievements on the programme.

While HiW aims to help clients move towards a working life, it recognises that their barriers to employment may be many and varied and so it considers each client's situation individually and holistically. In this way, it retains its original, distinctive household approach – understanding that the people around a client are likely to have an effect on their ability and willingness to work. It also looks beyond that, to the client's engagement with services and with the wider community, aiming to give them the confidence and resilience to access support for themselves if and when they need it in the future.

Figure 12 below is adapted from a diagram in one of the Phase 1 evaluation reports and illustrates how the flow of relationships through widening circles of support helps strengthen client resilience by building capabilities.

Figure 12: Flow of relationships

Building capabilities

4
Community

3
Services

2
Households into Work
1:1 support

1
Household

Client

Circle 4: The next step – translating capabilities into knowledge exchange in the community

Circle 3: Connection with service providers – participating in training, volunteering or receiving specialist support, e.g. debt management; developing new networks

Circle 2: Relationship with Employment Advocate – the first step in building capabilities

Circle 1: Existing relationships

Source: Adapted from Tyrrell[32]

EAs provide bespoke, personal support to each client, designed according to their needs but also their neighbourhood – the services that are accessible to them within their own community. In other words, EAs are not selecting from a fixed list of support organisations but are expected to continually have their ear to the ground for what is available in an area. They also help clients prioritise their support by looking at which areas need stabilising first; for example, getting a debt repayment plan in place.

The job description and person specification for the EA role emphasises the requirement to work collaboratively with the client in a way that builds their confidence. It specifies experience of advocacy: engaging with services on behalf of people who do not currently feel confident or capable

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[32] Tyrrell, 'Households into Work: Interim Evaluation of Pilot Programme'.

of representing themselves, and challenging behaviours and attitudes towards people who are disadvantaged. EAs are expected to have NVQ Level 3 or above in information, advice and guidance, or similar qualifications or experience.

The household budget is a nominal sum allocated to each client that the EA can use on a discretionary basis to assist with costs that would otherwise present barriers to achieving outcomes. These might be course fees, or associated childcare, but might also be food, or a top-up for the electricity meter, if that is what is required to stabilise the client's immediate situation. Before drawing on the household budget, the EA will look for alternative sources of appropriate support such as charity hardship funds, and the average spend per client in Phase 2 has been less than £60. However, its availability enhances the responsiveness of HiW support that is valued so highly by clients.

The Phase 1 qualitative evaluation highlighted that the voluntary nature of HiW supported the person-centred approach. Some clients had become risk averse, reluctant to try new routes to improving their circumstances, having faced benefits sanctions in the past when something didn't work out. However, during their time on HiW, if they were unsure about a course of action, they were unafraid to discuss it with their EA and if necessary step back and try something different, in the knowledge that they would not be adversely affected.[33]

The importance of personalised support is noted by the Commission on the Future of Employment Support in its recent Interim Report, which also finds that the evidence base for sanctions is weak and that sanctions-led approaches can be counter-productive.[34] Another recent report by IPPR urges a shift from 'transactional support' to 'relational support' in employment services, referencing HiW Phase 1 as an example of highly person-centred (relational) support.[35]

13.3 Reflections

13.3.1 Complex needs

By definition, the HiW client group is made up of people who have at least one issue in their lives that is creating a barrier to them seeking or sustaining work. In practice, many clients have multiple such issues, often severe or interacting in a way that makes them complex to address. This can be seen in the case studies, the client feedback survey, and in the registration data showing that 67% of clients had two or more support needs (with 50% having three or more, and 30% having four or more).

The same is true for other programmes working with people considered to be distant from the labour market. For example, an evaluation of the Work and Health Programme found that key workers often referred to having participants with 'complex' or 'more complex' needs, describing them as participants who had barriers to work beyond those directly associated with work and health, in terms of personal challenges such as alcohol or drug abuse, serious debt problems, and homelessness. A majority of key workers surveyed said that the needs of the participants they worked with were more complex than anticipated.[36]

Complexity also means that it is not a simple sliding scale between short-term unemployed, long-term unemployed and economically inactive. Some economically inactive people only need minimal help to be back in work, while someone who has until recently been in stable, well-paid employment might be in a situation where various issues have quickly spiralled out of control.

Mental health was a particularly prevalent issue among HiW clients, with 52% citing it as a support need. A recent report by the House of Commons Work and Pensions Committee describes the 'crisis of confidence' placing so many people at a disadvantage in the labour market. It refers to research

[33] Tyrrell.

[34] Campbell et al., 'Work in Progress. Interim Report: Executive Summary.'

[35] Wilkes and Parkes, 'Working Together'.

[36] Department for Work and Pensions, 'Work and Health Programme Evaluation'.

conducted by Mind, in which around a third of adults and young people said their mental health had deteriorated significantly since March 2020. Often this was linked to isolation: 88% of young people said that loneliness had made their mental health worse during the pandemic.[37]

Evidence continues to build for the negative impacts on mental health of the pandemic and associated control measures such as lockdowns. No doubt many HiW clients were affected in this way, and HiW aimed to adapt its support accordingly during the Covid Response Phase and beyond. However, for the HiW client cohort, mental health was already a significant issue prior to the pandemic. Indeed, the prevalence of mental health as a support need was even higher during Phase 1, at 65%.

It is important that participants in HiW and similar programmes – through the person-centred approach – are supported to build their overall confidence and resilience so that outcomes can be sustained. The impacts of this go beyond increasing the proportion of people in employment, potentially also reducing the burden on other public services such as health and social care. Recruitment, training, support and performance management of key workers (HiW EAs, for example) should continue to acknowledge the complexity of issues they may deal with. It takes time to overcome complex barriers to work and particularly to move towards not just employment but sustained employment – not just a job but a good job.

13.3.2 The value of data

The introduction of the online CRM has demonstrated the value of accurate, organised client records and the ability to interrogate them to better understand and shape the programme. The CRM has been an important data source for this summative evaluation but has also been used in a formative way by generating regular reports throughout Phase 2 to inform each level of programme administration and governance.

For data validity, it is important that the CRM is used in a consistent manner. All HiW programme staff are trained in its use with some being designated 'super-users' and undertaking annual CPD to ensure they have up-to-date knowledge, which they can pass on to others. Given how central the CRM now is to programme systems and the value of accurate information, it may be appropriate to update job descriptions to ensure related responsibilities are clearly allocated.

Data handling is subject to LCRCA policies and procedures on security and confidentiality. Data sharing agreements with local authority employment services facilitate referrals to and from the HiW programme. The CRM is able to be configured so that individuals see only the information that is applicable to their role; for example, it has been possible to create dashboards to share specific reports made up of collated anonymised data with the LCRCA research team. The more that reports (e.g. case studies) can be generated within the CRM with identifying data automatically stripped out, the easier it is to ensure confidentiality is maintained.

A valuable extra dimension is added by qualitative data. During Phase 1, in-depth interviews were carried out with a sample of clients and programme staff as part of the evaluation. During Phase 2, case studies and a client feedback survey have been introduced, and a series of videos have been produced with clients. HiW should continue to include and strengthen the voices of those with relevant lived experience when developing the programme. The LCRCA Lived Experience Group might be one route for this.

The CRM has generated opportunities for anonymised HiW data to be used by researchers to investigate a whole range of issues in relation to the client cohort; for example, a collaboration with LCRCA colleagues has looked at digital inclusion, and a collaboration with the University of Liverpool and Liverpool John Moores University (Economies for Healthier Lives) is exploring the potential for better integration of health and employment support. Research such as this can then inform the continual improvement of the HiW programme; for example, through the digital inclusion initiatives

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[37] House of Commons Work and Pensions Committee, 'Plan for Jobs and Employment Support'.

introduced in Phase 3 and by addressing any issues raised by the Economies for Healthier Lives equity audit of the programme currently underway. LCRCA should continue to explore opportunities for knowledge exchange utilising HiW data.

13.3.3 Programme differentiation and alignment

There are several programmes operating in the same space as HiW and this Phase 2 evaluation echoes the concern raised in the Phase 1 impact evaluation that insufficient differentiation between them may lead to inefficiencies and inequalities; for example, if potential clients are not being referred to the programme that best suits their needs.

Responsibility for this is largely above programme level, and many of the local employment support programmes are nationally commissioned. However, there was for HiW Phase 2 (and continues to be) no clear, explicit statement of programme objectives. Having evolved from its initial proposition, the programme would benefit from clarifying its offer, particularly in relation to other programmes. This would support the further development of the work that has already taken place to strengthen programme communications, and would assist those making strategic decisions about employment support in the city region. Ideally, the objectives would form the starting point for a defined theory of change linking context, inputs, activities, outputs, outcomes and impacts, providing a framework for future evaluation.

LCRCA has a crucial role to play in shaping employment support provision for the city region. It can draw on a range of information sources including programme evaluations, and research collaborations such as Economies for Healthier Lives, to understand what works best and where there might be gaps or overlaps, and can use this information to make strategic decisions about funding and commissioning. These responsibilities should be clearly allocated within the LCRCA governance structure, whether to the Employment and Skills Board or other appropriate group or groups.

The overall context for design and delivery of employment support is set by central government. Full devolution of employment support would enable LCRCA to develop more coordinated provision, working with local partners such as the NHS through the Cheshire and Merseyside Integrated Care System, as well as to be more responsive to local needs and opportunities. The current centralised funding context as with many public services is one of short-term policymaking and repeated bidding rounds, contributing to fragmentation of provision at local level. In the absence of full devolution, this could be alleviated with longer funding commitments and bidding processes that allow more time to gather evidence and meaningfully involve partners in the development of scheme proposals.

14. Recommendations

Table 8 is a summary of the main recommendations arising from this Phase 2 evaluation according to where responsibility for implementation would sit.

Table 8: Summary of recommendations

Recommendations for: **LCRCA People Delivery Board and HiW programme management team**

Inclusion:

14. Monitor the representation and outcomes of different groups and consider targeted activity, e.g. to improve access to the programme for under-served groups or to prioritise support where it will have most benefit

15. Amplify the voices of those with lived experience when developing the programme, e.g. through the LCRCA Lived Experience group and programme evaluations

16. Ensure Employment Advocates receive appropriate training and wellbeing support, and include their perspective in the next programme evaluation

Communication:

17. Develop clearly stated aims and objectives for the current phase to help position the programme in relation to other support; review and adjust if necessary for subsequent phases

18. Clearly articulate the offer of support from HiW, and the types of organisations that can make referrals to the programme, with a view to improving the suitability of referrals and increasing the proportion that translate into registrations

19. Continue to develop relationships with both referral and support organisations at local level, so as to match clients with the most accessible and appropriate support for them, helping to build both individual and community resilience

Data:

20. Continue to refine data collection to provide the information that is most useful, e.g. add a question about previously accessed support in the registration questionnaire

21. Register as a User Organisation with the DWP Employment Data Lab, to enable benchmarking and assist target setting

22. Continue to explore opportunities for research and knowledge exchange using HiW data, e.g. to identify and communicate gaps in broader service engagement and delivery that hinder HiW clients in their journey towards sustained employment

Recommendations for: **LCRCA Employment and Skills Board**

23. Review current employment support provision, utilising the range of information sources including programme evaluations and research collaborations to understand what works best and where there are gaps and overlaps

24. Use the available evidence to make strategic decisions about funding and commissioning to improve the efficiency and effectiveness of employment support provision

25. Consider whether key features of HiW (locally designed, community-based, person-centred) could beneficially be translated to other areas of service delivery

26. In service areas that are not locally devolved, make the case for longer-term funding commitments and sufficient time within bidding processes to gather evidence and meaningfully involve partners in developing proposals

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Appendix 1: Client characteristics

The following sections explore some of the client characteristic data in more detail. In some instances, it has been possible to make a comparison with data for all Liverpool City Region residents from the Annual Population Survey, a labour market survey encompassing population, economic activity and inactivity, and qualifications.[38]

Unless otherwise indicated, figures in the following section are representative of all Phase 2 clients, i.e. those registering between 1 October 2020 and 31 December 2022, of which there were 1,528 in total. (Although Phase 2 continued until 31 March 2023, from 1 January new clients registering formed part of Phase 3). In most cases, percentages have been rounded to the nearest whole percentage point.

A1.1   Distribution across LCR

Figure 13 compares the percentage of HiW registrations that were from each local authority area (during Phase 2) with the percentage of total LCR unemployed/inactive that were from each local authority area (during 2021 and 2022). It indicates that, while the pattern of worklessness across the city region is broadly reflected by HiW, Halton and Knowsley were somewhat over-represented on the programme while Liverpool and Wirral were somewhat under-represented.

Figure 13: Breakdown of HiW clients by local authority area
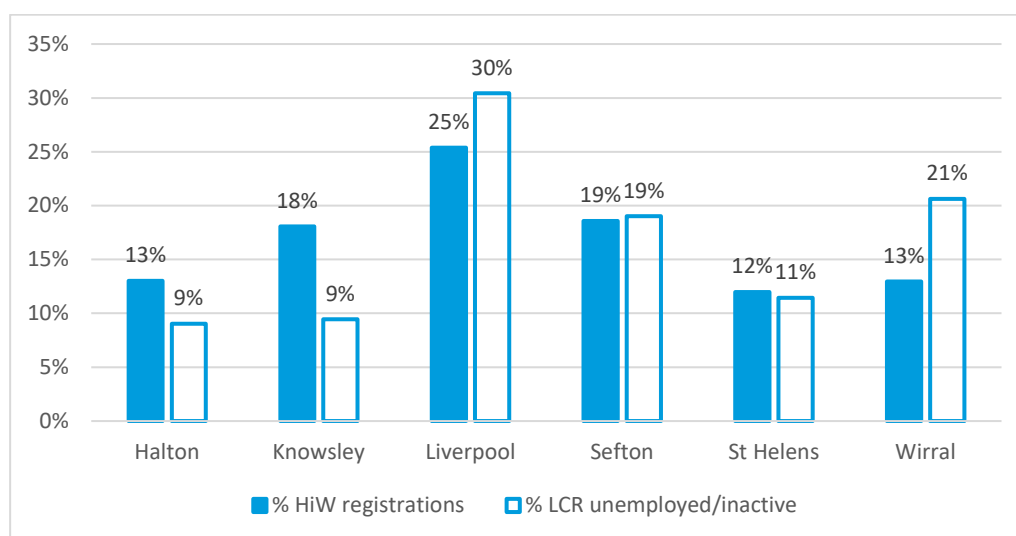
Sources: CRM data (LCRCA) and Annual Population Survey (Nomis)

A1.2   Age, ethnic group and gender

Figure 14 compares the percentage of HiW clients that were within each age range on registration with the percentage of total LCR unemployed/inactive that were within each age range (average of 2021 and 2022). It shows that the programme was best at engaging clients aged 25–49 and less successful in engaging people who were either younger or older. The age of the EAs might be an influencing factor since they also tend to be in the middle age brackets.

Figure 15 shows the percentages of HiW clients within each high-level (aggregated) ethnic group. Annual Population Survey data from Nomis categorises ethnic group only at the level of White or Non-

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[38] Nomis, 'Dataset: Annual Population Survey'.

white and taken as an average across 2021 and 2022, shows that 10% of unemployed or economically inactive LCR residents were Non-white, which compares with 11% of HiW clients.

The gender split of HiW clients was 52% female and 48% male (rounded to the nearest 1%) with 'other' and 'prefer not to say' comprising less than 1%.

Figure 14: Age of HiW clients
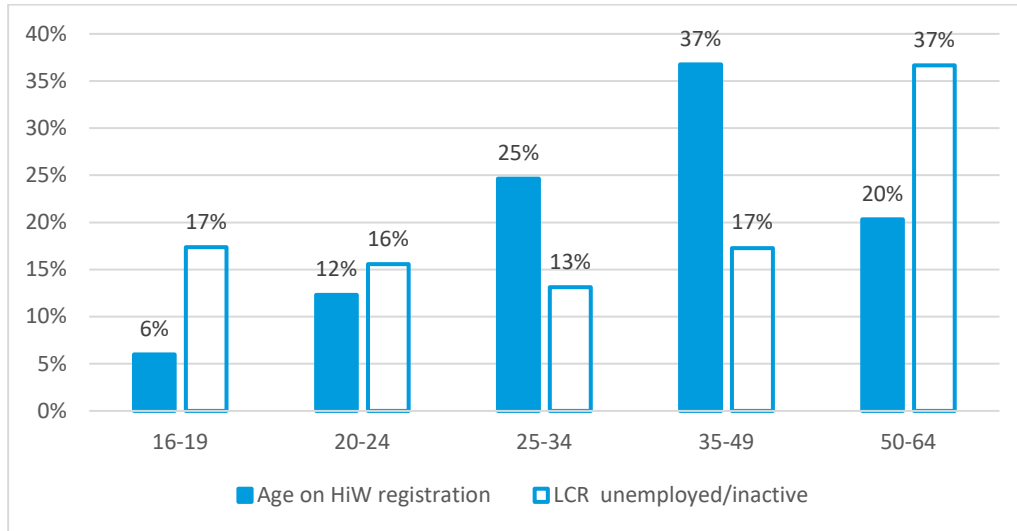
Sources: CRM data (LCRCA) and Annual Population Survey (Nomis)

Figure 15: Ethnic group of HiW clients
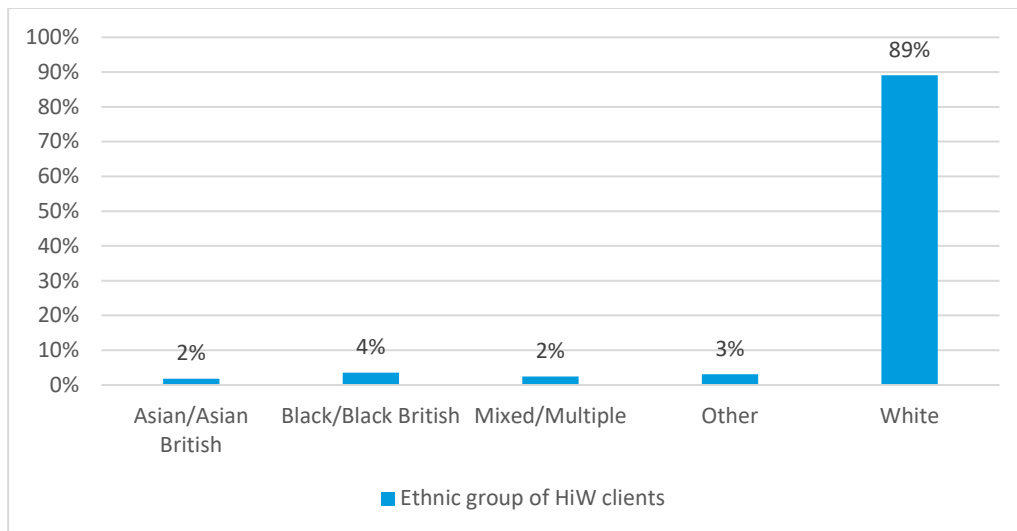
Source: CRM data (LCRCA)

A1.3   Employment status

To be eligible for the programme, clients must be either unemployed or economically inactive. Both are categories of people without a job; simply put, people in the unemployed category are actively seeking work whereas people in the inactive category are not. The Office for National Statistics describes the main economically inactive groups as students, people looking after family and home,

long-term sick and disabled, temporarily sick and disabled, retired people and discouraged workers (people who say their main reason for not seeking work is they believe there are no jobs available).[39]

Of the HiW clients registered during Phase 2, 59% were unemployed and 41% were economically inactive. Figure 16 shows the length of time since last paid employment for all Phase 2 registered clients. Of the unemployed clients, approximately two-thirds were classed as long-term unemployed (unemployed for 12 months or more).

Figure 16: Length of time since last paid employment of HiW clients
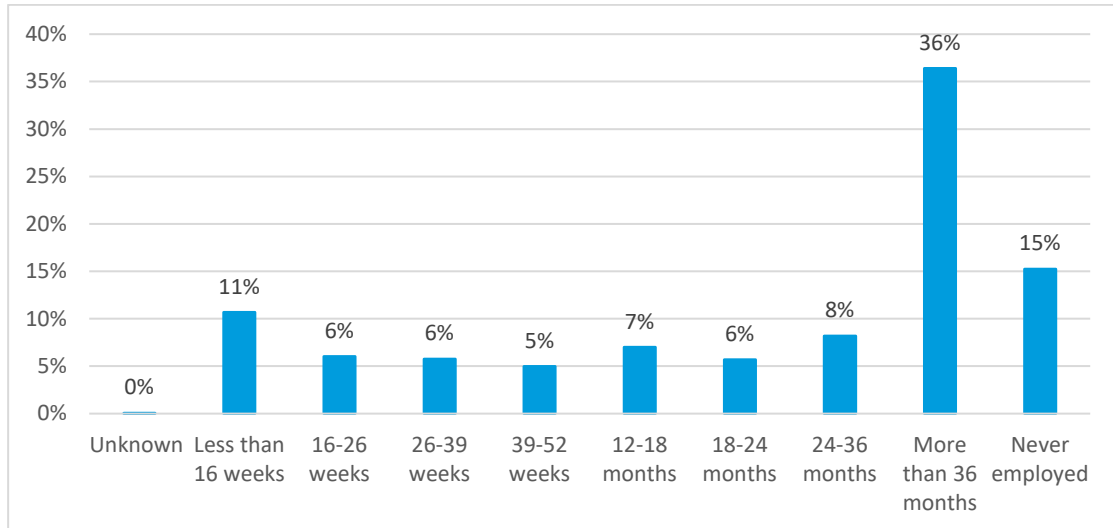
Source: CRM data (LCRCA)

A1.4   Financial situation

Figure 17 shows the breakdown of responses when clients were asked about household income as part of the registration questionnaire. A separate question asking about use of foodbanks was added at the start of Phase 2 to provide additional information about a household's financial situation, and responses show that 24% of clients had used a foodbank within the previous three months.

Figure 18 shows the level of personal debt reported by HiW clients on registration. 54% of clients answered yes to a separate question on whether they had personal debt. The chart represents all clients, with those who answered no included within the lowest debt category.

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[39] Office for National Statistics, 'A Guide to Labour Market Statistics'.

Figure 17: Annual household income of HiW clients
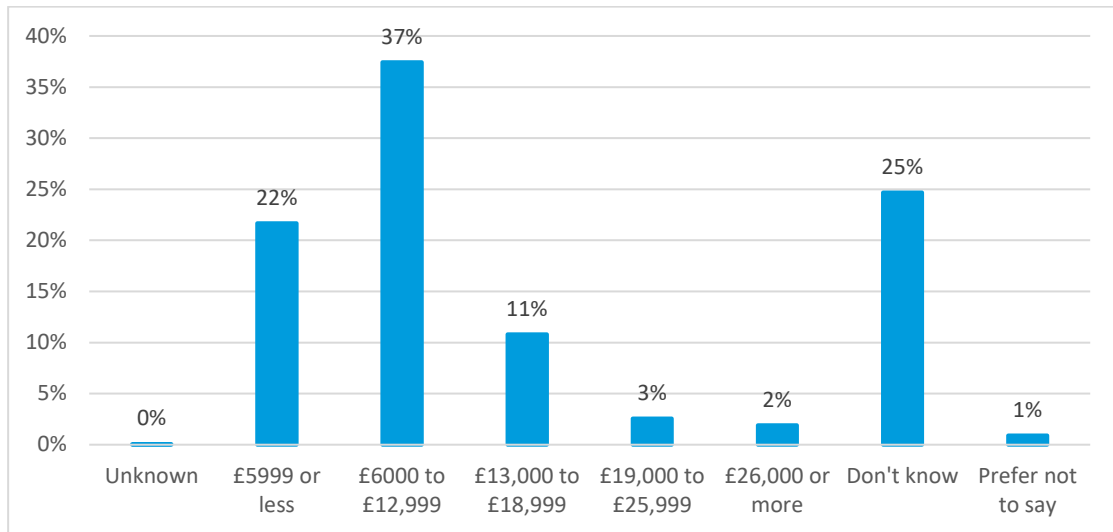
Source: CRM data (LCRCA)

Figure 18: Level of personal debt of HiW clients
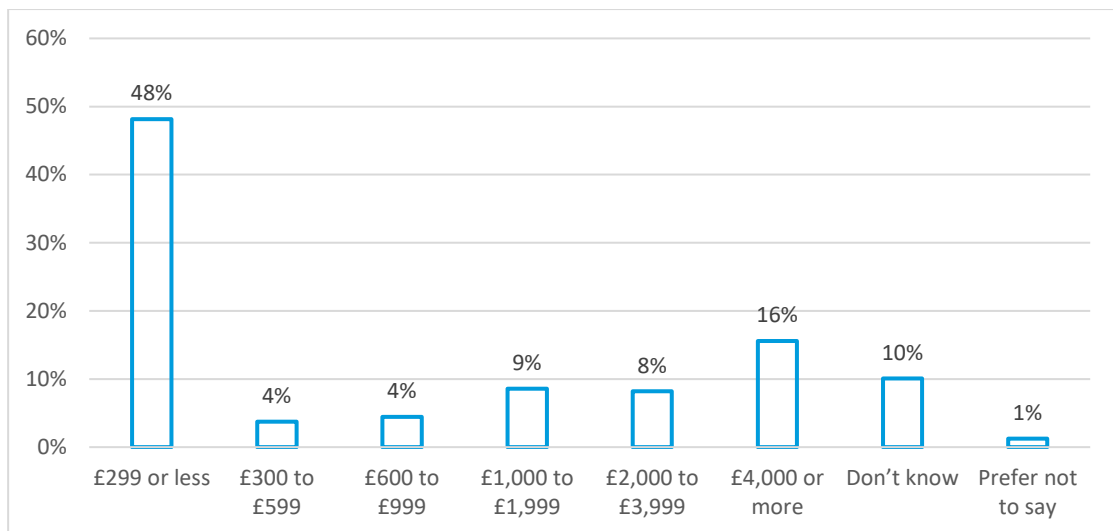
Source: CRM data (LCRCA)

A1.5   Education and skills

Figure 19 shows the level of education of HiW clients with reference to the International Standard Classification of Education (ISCED) levels. These are:[40]

- ISCED 1 – primary education or equivalent (Key Stage 1 or Years 1–6 in England)
- ISCED 2 – lower secondary education or equivalent (Key Stage 2 or Years 7–9 in England)
- ISCED 3 – upper secondary education or equivalent (Key Stage 4 or Years 10–11 in England)
- ISCED 4 – post-secondary, non-tertiary education
- ISCED 5–8 – tertiary education (e.g. degree, diploma, higher level apprenticeship).

21% of clients answered no to a separate question about whether they had basic skills, i.e. entry level, level 1 or level 2 in English, maths or ESOL.

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[40] OECD, 'Education GPS - United Kingdom'.

Figure 19: Level of education of HiW clients
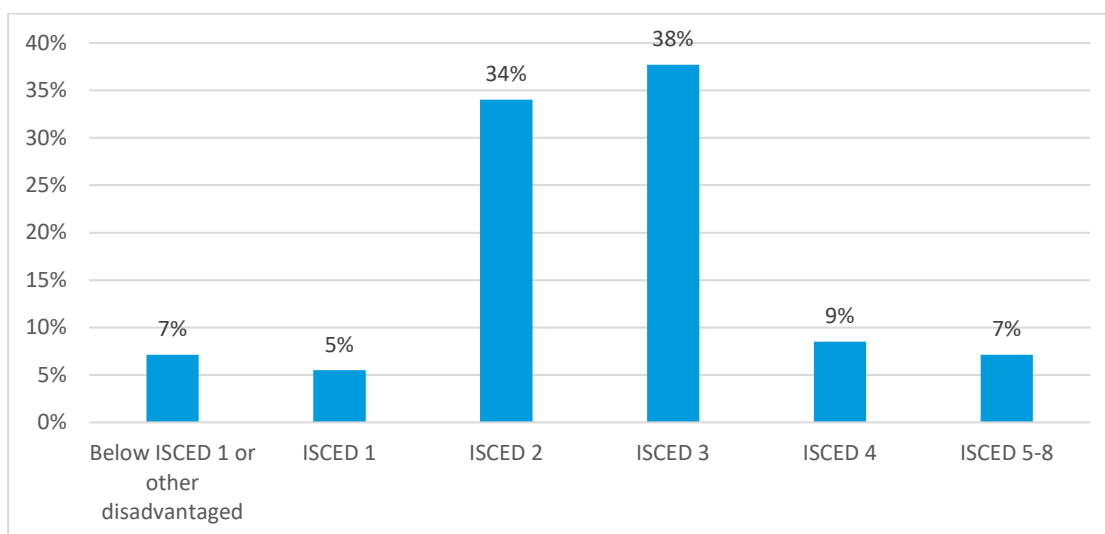
Source: CRM data (LCRCA)

A1.6 Households and housing

Of the 1,528 Phase 2 clients, 84% lived in a jobless household. Many of these are single-person households, as can be seen from Figure 20. However, 229 clients lived in a household where at least one other household member had also joined the programme. At 15%, this is somewhat more than the proportion of client referrals (see Figure 5) but reasons for this include clients being jointly referred by a referral partner, and the significant number of clients for whom referral route is unknown, i.e. not recorded.

Figure 20 also shows the spread of household types supported by the programme, which is indicative of the range of support needs (see Table 5 in Section 6.3).

Figure 21 shows the housing situation of HiW clients at the time of registration. Based on responses to a separate question, 16% of clients were categorised as homeless or affected by housing exclusion. People who are legally homeless are unlikely to be considered suitable for the HiW programme, on the basis that their immediate barrier to work is too great, and they would usually be referred on to a homelessness programme in the first instance. However, this category also includes people who are experiencing the following types of housing exclusion (in line with ESF definitions):[41]

- Houselessness (people in accommodation for the homeless, in women's shelters, in accommodation for immigrants, people due to be released from institutions and people receiving long-term support due to homelessness)
- Insecure accommodation (people living in insecure tenancies, under threat of eviction or violence)
- Inadequate housing (living in unfit housing, nonconventional dwellings e.g. in caravans without adequate access to public utilities such as water, electricity or gas or in situations of extreme overcrowding).

7% of HiW clients were homeowners and 40% lived in social housing, which compares with 59% and 21% respectively across all LCR households, according to Census 2021.

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[41] European Union, '2014-2020 European Growth Programme: Output and Result Indicator Definitions Guidance for the European Social Fund'.

Figure 20: Household composition of HiW clients
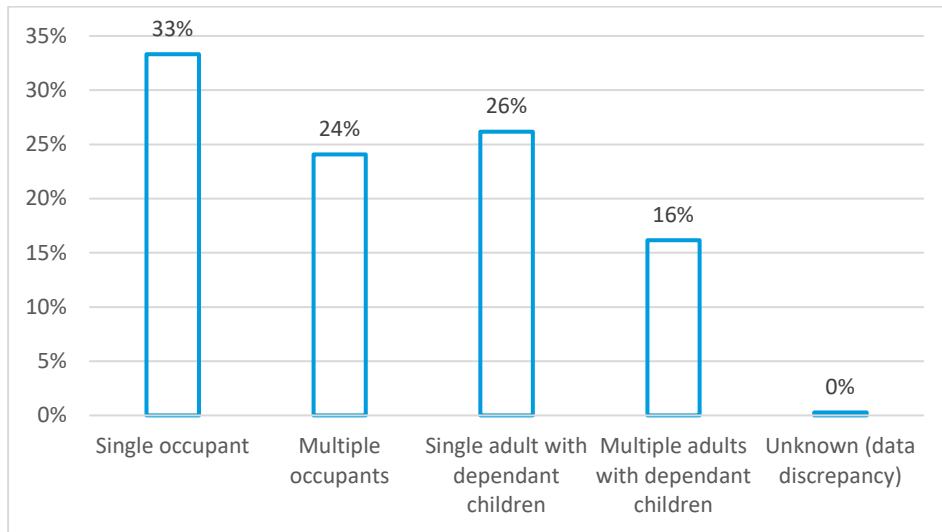
Source: CRM data (LCRCA)

Figure 21: Housing situation of HiW clients
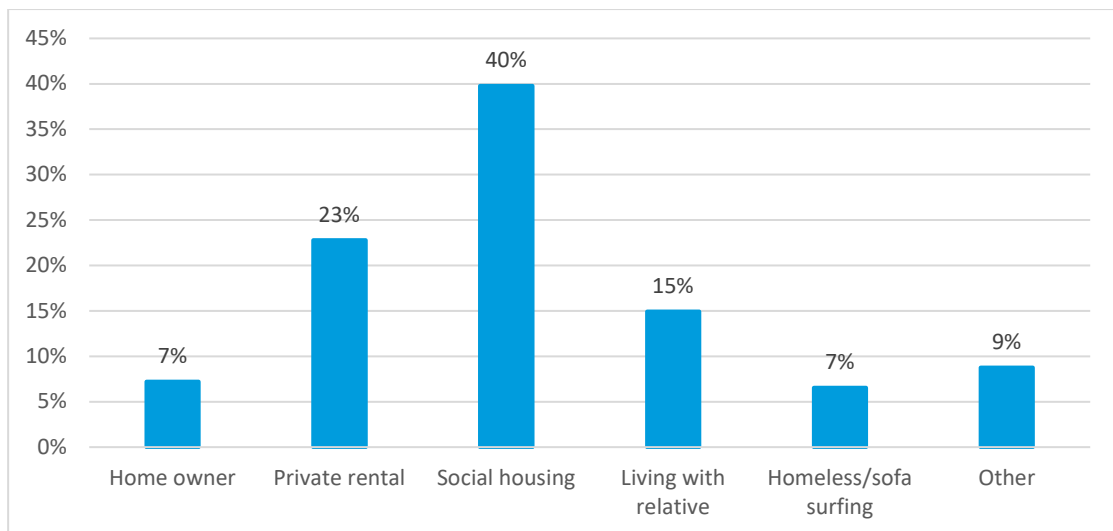
Source: CRM data (LCRCA)

A1.7   Health and disability

Figure 22 gives an indication of the proportions of clients with disabilities and health conditions, and the proportion with a disability and/or health condition that limits their ability to work. It was only from 1 October 2021 onwards that questions on these topics were consistently asked as part of registration; therefore, data from before this date have been excluded and the charts are representative of 854 clients in total. 'Disability', 'substantial' and 'long term' are ESF categories, which are as defined under the Equality Act 2010. Among all unemployed or economically active people in Liverpool City Region, 52% had a substantial/long-term disability in the period 2021–2022.[42] However, this will include people whose consequent barrier to work is significant and beyond the scope of HiW.

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[42] Nomis, 'Dataset: Annual Population Survey'.

Figure 22: Disability and long-term health conditions among HiW clients
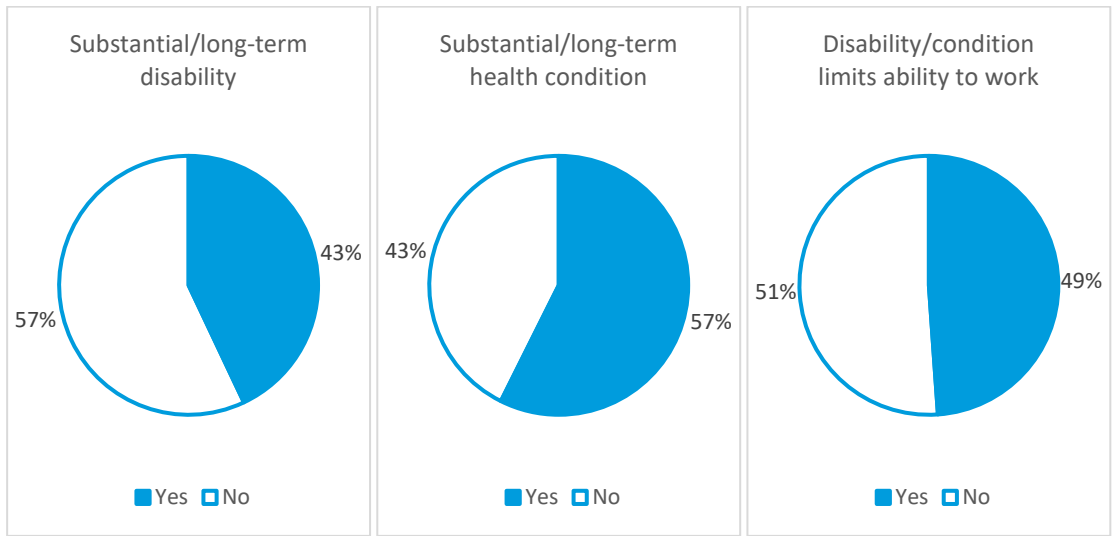
Source: CRM data (LCRCA)

Appendix 2: Client journey maps

Client journey map: Client 1

Client 1's situation at referral

- Out of work around 4 years and has had support from other programmes without success
- Low confidence, was shy as a child and feels as he has got older this has affected him getting into paid work
- Has worked in IT data entry, has completed a course in mechanical and electrical engineering, started a business qualification but did not complete the course due to his dad's health issues
- Volunteers at a local charity shop and this is generally the only time he leaves the house
- Has some concerns about his weight and diet; doesn't have a good diet and lacks confidence to go the gym

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12/10/2021
Referral
Referred to Adult Learning for IT course.

29/10/2021
Household budget
3-month gym membership and gymwear purchased.

10/01/2022
Household budget
Further 3-month gym membership purchased.

14/01/2022
Healthy lifestyle
Client 1 is attending the gym regularly and is starting to feel much fitter. He has started to lose weight and is eating better.

14/01/2022
Confidence and aspirations
Client 1 has grown in confidence and is getting more involved at the shop. He has agreed the EA can put his CV forward for suitable jobs.

14/01/2022
Friends and connections
Since joining the gym Client 1 is talking to more people and making new 'gym buddies'. He says the staff recognise him and he is enjoying the 'new him'.

04/05/2022
Healthy lifestyle
Client 1 has changed gyms as he has found a cheaper one with more machines; he feels his diet and weight continues to improve.

25/02/2022
Emotional wellbeing
Client 1 is feeling very positive and thinks this is due to going to the gym regularly. He feels energetic and says if anything bothers him he seems to just get on with it.

26/08/2022
Confidence and aspirations
Client 1 has improved in his confidence massively and says he wouldn't have been able to do the things he is doing last year. He feels a difference in his self-esteem and is more focused on achieving his goals.

30/06/2022
Money
Client 1 is managing his money well and has paid off his final debt. He now pays for the gym himself.

Client 1's situation on completion

- Continues to volunteer at a charity shop and due to his increased confidence and trustworthy nature he is now a keyholder; he recently dealt with a break-in at the shop and felt confident enough to deal with this even though he said he wouldn't have known what to do if this had happened a few months ago
- Has decided he would like to work in retail, so chose not to do the IT course
- Attended a recruitment open day at a retail outlet; was unsuccessful but gained interview experience
- Has continued attending the gym and is now paying for this himself; he feels much healthier and he has lost weight; he says it has increased his confidence and he feels much more comfortable when approaching and talking with people; his family are commenting that they have noticed a huge difference in him

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This client journey map is based on a real, anonymised case study provided by the Employment Advocate (EA). It does not include every interaction with the client but aims to illustrate how they have moved towards employment with support from Households into Work (HiW).

Client journey map: Client 2

Client 2's situation at referral

- Male aged 31
- Unemployed for 11 months
- Homeless and has spent time sleeping rough
- Was in care as a child and suffered a family breakdown
- Long-term cannabis misuse
- Poor mental health, struggling with anxiety, depression, feels isolated and is overwhelmed when in social settings

16/11/2021
Referral
Request to jobcentre to fund copy of birth certificate.

22/11/2021
Referral
Referred to a local addiction support organisation.

23/11/2021
Referral
Appointment with the Council's housing service, with EA attending for support.

17/01/2022
Stability at home
Client 2 is staying with his mum. He has been supported to access temporary housing but feels this set-up is OK and is more stable.

03/03/2022
Emotional wellbeing
Client 2 reports that staying with his mum and brother is good support for him emotionally. He has felt confident enough to attend the community shop alone. He acknowledges that counselling would help him going forward but feels he is not ready yet.

03/03/2022
Healthy lifestyle
Client 2 has chosen not to engage with addiction support but has reduced his cannabis use by himself. He takes his dog for walks which helps his physical and emotional health.

04/05/2022
Friends and connections
Client 2 has met his EA in community locations and this appears to have helped with his anxiety when in crowded places. He reports that he doesn't mix much with friends as they can be a negative influence, but he plays on his games console and spends time with his brother.

20/03/2022
Household budget
Client 2 has obtained employment as a warehouse operative and has been supported to buy bus passes and new clothes in advance.

08/04/2022
Money
Client 2 is earning a regular wage at the warehouse and is working overtime often. He loves earning money now and is managing much better financially.

08/04/2022
Skills
Since starting work, Client 2 has been learning how to use various machinery and is also doing a forklift qualification. He is picking orders and using various systems and feels he is managing well with new challenges.

Client 2's situation on completion

- Working as a warehouse operative on a 12-week contract with an employment agency and will be taken on permanently after this period
- Received 12 weeks of 'wraparound' support from HiW on starting work
- Reduced cannabis use over time in preparation for starting work, knowing that he would be drug tested
- Is living with his mum and brother and reports his home life is much more stable now
- Has grown in confidence and no longer feels isolated

This client journey map is based on a real, anonymised case study provided by the Employment Advocate (EA). It does not include every interaction with the client but aims to illustrate how they have moved towards employment with support from Households into Work (HiW).

Client 3's situation at referral

- Female aged 41, married with two children aged 16 and 21
- Referred by National Careers Service
- Has not worked for over three years
- Health problems (asthma and fibromyalgia), social isolation, low confidence and aspirations
- Keen to make some progression with her life but does not know how to take the first steps
- Is concerned that her lack of IT skills might hold her back

08/04/2022
Referral
Referral to Age UK digital skills course.

26/04/2022
Referral
Referrals to beginners sewing course and Fit Fans.

27/04/2022
Skills
Client 3 is really enjoying the digital skills course; she feels it has increased her confidence with IT. She has attended the first session of a sewing course and will continue. She has expressed an interest in improving her Maths and English at a later date.

27/04/2022
Confidence and aspirations
Client 3 is growing in confidence now she has started her journey to making changes. She is no longer worried about lack of IT skills as this is being addressed. She is meeting new people and developing new skills. She does not know what she would like to do long term but will discuss this at a later date.

27/04/2022
Healthy lifestyle
Client 3 has enrolled on Fit Fans, a 12-week fitness programme with Tranmere Rovers.

04/05/2022
Family and relationships
Client 3's husband has registered for HiW.

16/09/2022
Referral
Referrals to Level 1 British Sign Language and sewing machine courses.

04/10/2022
Money
Client 3 has paid off a debt which means she now has more disposable income. She manages her finances well in general but is beginning to feel the rise in cost of living.

22/11/2022
Money
Client 3's husband has just started work and she feels their financial situation will improve from now on. She is considering job searching herself in the near future.

04/10/2022
Confidence and aspirations
Client 3 feels her confidence has grown as a result of the changes she has made to her life. She can now see a working future and is considering a teaching assistant course. She also wants to obtain her driving licence.

Client 3's situation on completion

- Completed digital skills course
- Completed beginners and Level 1 sewing courses and has progressed to Level 2
- Completed Fit Fans programme and has re-joined
- Has begun a British Sign Language Level 1 course and may consider a career as a teaching assistant in future
- Has encouraged her husband to join the Fit Fans programme, which he is enjoying
- Having also signed up to HiW, her husband has completed a warehousing course and found employment
- Due to their increased activity, including walking and swimming, they have lost weight and feel much better

This client journey map is based on a real, anonymised case study provided by the Employment Advocate (EA). It does not include every interaction with the client but aims to illustrate how they have moved towards employment with support from Households into Work (HiW).

Client journey map: Clients 4 & 5

Clients' situation at referral

- Married male and female, both aged 31
- Self-referred after meeting the HiW team at a community shop and registered as a couple
- Refugees who have not worked in the UK
- Living in temporary accommodation with their two-year-old son
- Several barriers to work, such as: housing issues, financial/benefits issues, language barrier, digital exclusion, low levels of confidence, poor mental health, feeling isolated with no family or friends

July 2021
Referral
Liaison with housing officer to ensure clients are on waiting list and will not be made homeless. Referral to community centre for help with benefits application.

30/07/2021
Household budget
Purchase of Metro card to help with travel costs.

30/07/2021
Confidence and aspirations
Client 5 has demonstrated the confidence to set a long-term goal of studying for a biology degree.

17/09/2022
Money
The couple are now receiving the housing element of UC to help with rent.

13/09/2021
Referral
Referral to ESOL lessons for Client 4.

30/07/2021
Stability at home
The family have gained stable housing and will be moving in soon. They have asked for help moving their belongings. EA will ask jobcentre to provide wi-fi and laptop once they have moved in.

17/09/2022
Confidence and aspirations
Client 5 still aims to gain full-time employment and is taking the relevant steps such as engaging with ESOL lessons.

17/09/2021
Stability at home
The family has settled into their new home. The move was stressful, but they are happy to have stability.

22/12/2022
Friends and connections
The couple are supporting another refugee locally.

15/02/2022
Emotional wellbeing
Client 5 has begun wellbeing sessions and feels happier now the weather is warmer and the baby is in nursery.

01/02/2022
Referral
ESOL for Client 5, and family activities at local library.

22/12/2022
Confidence and aspirations
The couple have the confidence to start doing things for themselves and have completed nursery application forms for their son without support.

Clients' situation on completion

- The family has obtained stable housing through the Council, along with Universal Credit housing element to help with rent payments; the property is fully equipped thanks to kind donations from the local community; they have access to a laptop and wi-fi
- The couple are now in receipt of the correct benefits and are more financially stable
- They are enrolled on an English for speakers of other languages (ESOL) course at a local college and are finding it useful
- Client 4 is able to consider employment and has completed a CV in preparation for applying for jobs; he has joined a gym and attends regularly
- Client 5 is engaging with an NHS wellbeing service to manage systems of depression; she is considering volunteering at local food banks and has expressed an interest in beauty courses
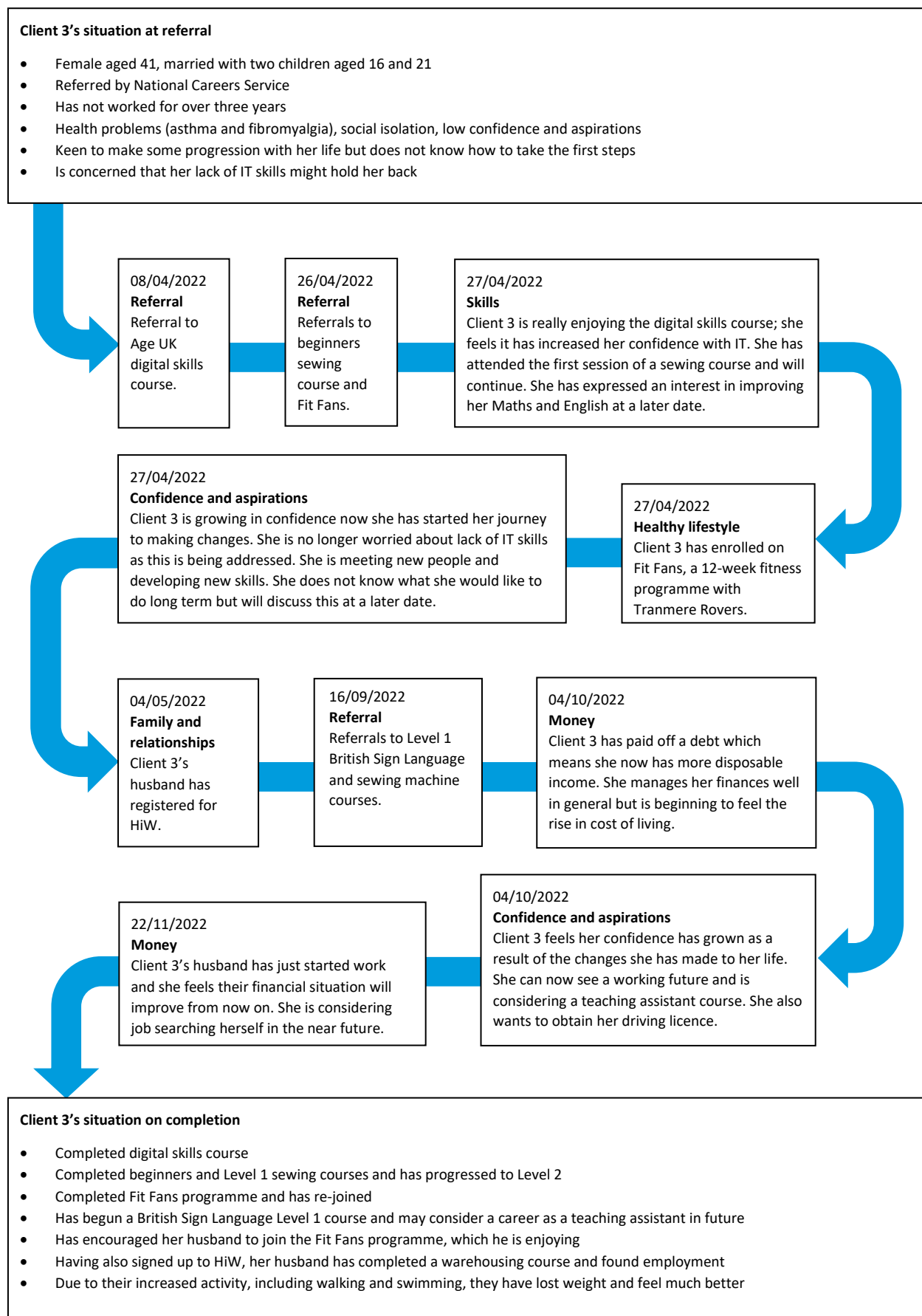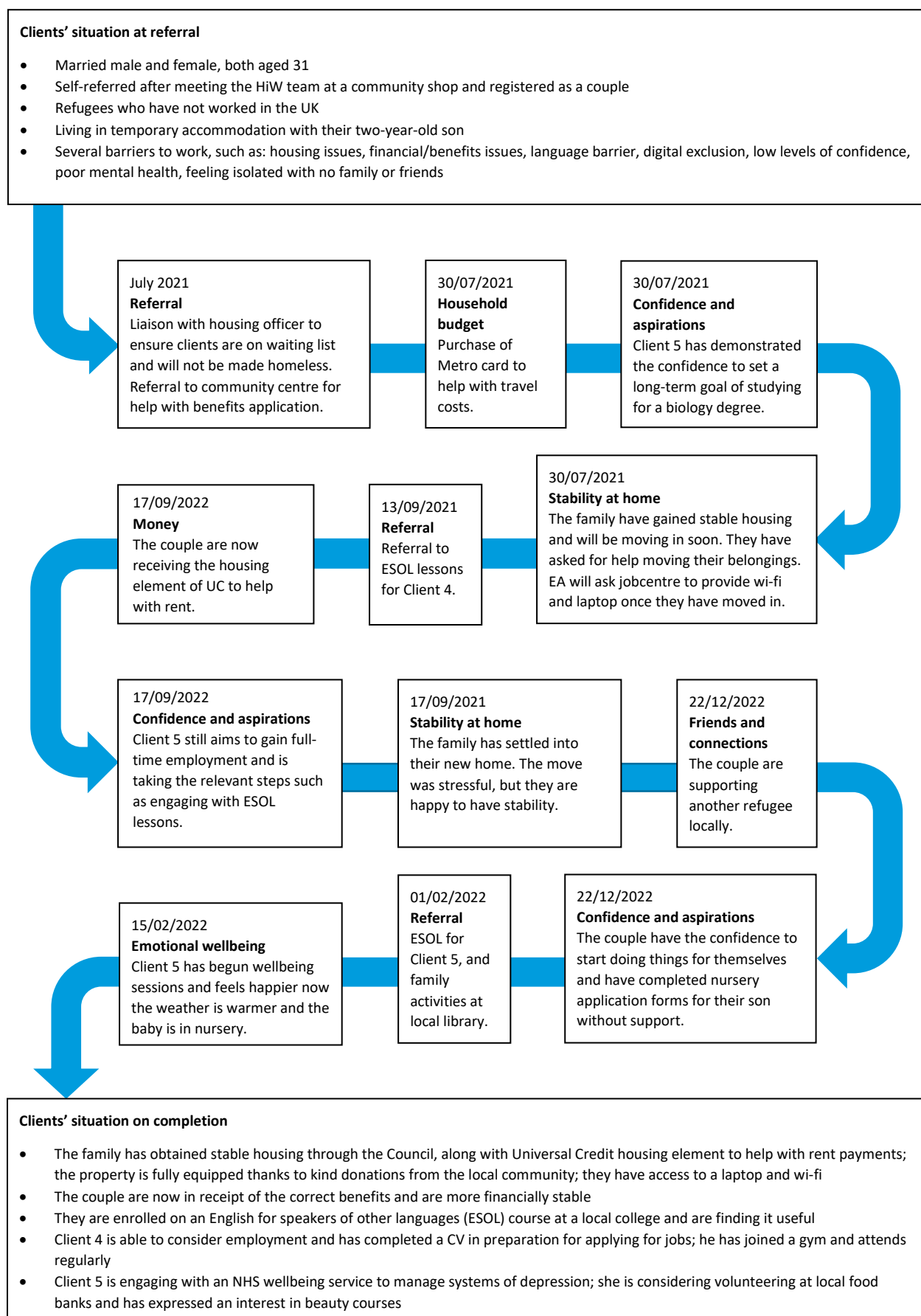
This client journey map is based on a real, anonymised case study provided by the Employment Advocate (EA). It does not include every interaction with the client but aims to illustrate how they have moved towards employment with support from Households into Work (HiW).

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