

Commercial in Confidence



## Wheatsheaf Trust

**ASSESSMENT SERVICES**  
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## 1. Organisation – Information, Introduction and Overview

Wheatsheaf Trust, established over fifteen years ago, is a charity working to promote social inclusion through the provision of advice and support centred on education, training and employment. Its charitable objects are *‘the relief of unemployment for public benefit in such ways as may be thought fit including the provision of advice and assistance to find employment’*. The website summarises their beliefs – *‘We believe that everyone has something to contribute to society, everybody can be helped to reach their potential, and we are all entitled to a second chance in life. Employment, and the development of skills, provide the best route out of poverty... enlarging their options and helping individuals and families discover what they are truly capable of. Whether they are out of work or in low paid jobs, we are committed to helping improve the prospects of everyone who comes through our doors’*.

Wheatsheaf provides services across South Hampshire (and has recently expanded to include the Isle of Wight), with bases in Southampton, Havant and Gosport. Staff also deliver services through outreach and partner premises.

This is the fifth time the Trust has been assessed against the **matrix** Standard – having maintained accreditation consistently since 2004.

Information, advice and guidance (IAG) is the core of all services delivered by the Trust. Since the last assessment some contracts have concluded and new contracts have been developed, inevitably this has led to some internal restructuring. Wheatsheaf’s work is now organised under three strands, each with its own Project Manager: the Work Programme; the National Careers Service; and Youth Provision (which comprises a number of contracts such as Future All, a contract with Hampshire County Council to work with young people who are NEET (not in employment, education or training) and work with the Youth Offending Service - YOS). Each strand has a team of Key Workers (advisors) – previously advisors were more generic, working across contracts – now they are dedicated. Overall there are eighteen advisors, supported by a small team of Customer Service Assistants and volunteers.

Wheatsheaf has always had a relatively flat management structure, though since the last assessment has developed the post of Operations Manager – Key Workers report to the relevant Project Manager – Project Managers report to the Operations Manager - the Operations Manager reports to the CEO.

Changing contracts/funding since the last assessment has meant that overall there has been a decrease in the number of service users, and also a reduction in the number of delivery sites, however, the Trust is beginning to see this reversing – with indications of increasing customer numbers (Wheatsheaf relocated its head office/main site in 2015 and the associated ‘open day’ resulted in an increase in referrals/new service users); and expansion to the Isle of Wight.

At the last assessment three areas for continuous improvement were identified, these were reviewed as part of the annual Continuous Improvement Check process and have been addressed as follows:

- Development of social media – the use of Facebook in particular has been developed in the last year to the extent that this is now identified as a strength (see later)
- Formal evaluation of the effectiveness of signposting – this was initially tackled through caseload reviews which took place within team meetings. More recently a staff survey specifically asked *‘which external agencies who are also working with our clients are the most important for you to engage with when supporting them to prepare for and enter work and why’* and *‘thinking of when you have signposted a client to another agency for a particular package of support that has gone well for them... what elements of that support do you think it would be good if Wheatsheaf could offer in house’*.
- Reviewing resources – this was a challenge in relation to the wealth of hard copy resources accumulated, but has been addressed, in some respects by default through relocation and site closure. Most resources are now on line in any event, and an interview with a Customer Service Assistant confirmed that it is part of their role to maintain hard copy materials.

Other significant changes since the last assessment include the appointment of a new CEO who has taken over from the Trust’s founding CEO; the development of a Social Enterprise initiative (offering real jobs to customers); and a redesign of the Trust’s website.

## 2. Areas of Particular Strength

A number of strengths were identified during the assessment. These are detailed below. The numbers in brackets refer to the element and criteria of the **matrix** Standard.

- Wearsheaf provides a truly client centred service – there were numerous examples of how programmes had been built specifically around individual service user’s needs, for example where traineeships had been developed specifically for individuals, or where ‘favours’ had been ‘called in’/personal contacts exploited to provide work experience or job trial opportunities. One member of staff said *“I go through a list of options with them, but then say if there’s nothing on there you like, let’s add other things”*. Another described how he saw it as his role to *“fish out”* what the service user wanted and put together a package in support of that. Other staff noted that service users *“know they need something, but they don’t always know what... my role is to show them what’s out there, help them identify their skills... expand their horizons”*. Advisors also frequently reflected Wearsheaf’s belief that *“one size does not fit all”* and that key to success was finding an approach that worked for each individual. As a part of this, a number of clients were at pains to point out how ‘forgiving’ the Trust was – willing to give them a second chance if they *“mucked up”* or even if they *“kicked off”*. Throughout the interviews with service users there were frequent references to being treated with respect, as an individual, and of being offered opportunities specifically related to their circumstances and ambitions (1.3, 3.3, 3.4, 3.5)
- As noted as a strength in previous assessments, Wearsheaf has a clear and well understood ethos and set of values – throughout interviews with staff they gave examples of practice and referred to these as illustrations of *“the Wearsheaf way”*. This was about being client and solution focussed; working with individuals (and in some cases the wider family) holistically; being creative and flexible in approach; and working with customers for as long as necessary to achieve results. This clarity of ethos has been maintained even though the nature of contracts has become much more target focussed, and there is pressure to work in ways counter to Wearsheaf’s approach. The new CEO has been keen to sustain the organisation’s values whilst adapting to the external contract environment. This has been well communicated to staff – *“we recognise [with staff] that the ‘one size fits all’ is in the room, but work with them to achieve balance”*. This is a good example of the Trust’s considerable professional integrity as well as strong leadership and management (1.2, 1.3)
- Staff are competent and passionate – all staff interviewed talked about ‘loving’ their jobs, and most have been with the Trust for some considerable lengths of time. There were many examples of progression to different roles and of training opportunities (in particular ensuring all advisors hold or achieve level 4 IAG qualifications, and all Project Managers – PRINCE 2). But the most frequently cited reason why staff felt such positivity was the culture of the organisation, within which they are encouraged to use their skills and bring their own style of delivery. They talked about not being micro-managed, about being allowed to *“think outside of the box”* and *“try out different approaches”*. They were open to learning from peers, even swapping customers if they felt they were not making progress.

This enthusiasm becomes apparent in each advisor's work with their customers – *"I don't know who was more excited [when customer secured an interview] – her or me... to be honest I think it was probably her"* (customer) (1.7, 3.2, 3.3)

- The Trust 'celebrates' customer achievements – all advisors are required to write up a selection of client evidence (case studies) each month to illustrate outcomes achieved, some of these are then featured in newsletters or on the website. Around the outside of jobs boards and training boards within each centre are stars capturing outcomes achieved by customers. Staff routinely share information about their clients so that they know each other's caseloads (customers interviewed commented that they were personally welcomed by whoever was around when they came in, not just by their specific advisors – *"It's like they're your family... they all ask how it's going, not just the one you're seeing"*). This 'celebration' is well used both to inspire other service users, but also as a way of internally acknowledging and recognising the considerable work the advisor has invested in the customer (4.2)
- The Trust has utilised resources to create pleasant, welcoming and conducive environments for service delivery. Wearsheaf has undertaken a careful review of venues in light of changing contracts/funding. This has led to the closure of two sites and the 'mothballing' of another, but also investment in relocation and the creation of well used and valued customer spaces. The new site in Southampton has a café area (free tea and coffee) with access to a good number of computers and customer telephones. It is modern and attractive, and service users interviewed commented on how welcome they were made to feel and how they felt they could *"come in at any time"*, and how the quality of the space made them feel valued – *"It's a bit too nice for us... but seriously it makes you feel good coming here"* (2.1)
- Wearsheaf has a long history of working in partnership and is very well known in the area (the Trust is frequently alluded to during other organisation's **matrix** assessments). This continues as a strength. Following the opening of the new Southampton Office an open day was held to which the Trust's extensive list of partners and contacts was invited. It was a successful event and resulted in an upturn in referrals/new customers. Partnership work has become increasingly important to the Trust – previously the majority of customers were referred by Job Centre Plus – the changing nature of contracts means that this is no longer the case – and so staff have worked hard to strengthen relationships to ensure that as many potential service users as possible are made aware of the services on offer. This work also supports signposting so that customers can access specialist support – some agencies also now come in to Trust premises to deliver, further facilitating this (e.g. money advice, EU Welcome Project) (1.8, 1.6, 3.6)
- At the last assessment Wearsheaf was encouraged to develop the use of social media. This was slow to take off, with the first forays being senior management tweeting. Last year one advisor felt that the Trust was falling behind in its use of social media and so prepared a proposal for the senior management team. This was approved and she was given the go ahead to develop the use of Facebook, as well as being supported to attend social media training. Facebook is now well used to advertise jobs, link to other useful providers, notify about events, publish hints and tips. Customers can also ask questions and give feedback.

A formal policy has been developed to handle misuse and user statistics are analysed to review what content is proving most interesting to customers. The advisor noted that there is still much potential for development – but what has been implemented since the last assessment makes this an area of strength (4.7)

### 3. Areas for Continuous Improvement

Areas for continuous improvement were identified during the assessment which may develop or enhance the service delivered. These are detailed below and for the organisation to consider as part of its ongoing continuous quality improvement actions. The numbers in brackets refer to the element and criteria of the **matrix** Standard. These will form the basis for discussion at the Continuous Improvement Checks (CIC) conducted twelve and twenty-four months from the date of this Assessment, along with any other notable developments.

- The Trust may wish to consider reviewing how service users are made aware of the organisation's safeguarding policy and procedure. Whilst all customers reported that they felt safe (indeed a number noted this as something they especially valued about Wheatsheaf), they were not always clear about who they could speak to if they had any concerns (other than their advisor). Also with regard to safeguarding – staff have yet to be trained in Prevent duties, although this is planned for the near future (1.4)
- The Trust could consider providing more in depth induction training for volunteers to ensure that they are familiar with organisational policy and practice, and in particular that they are able to support the delivery of IAG in an impartial and objective manner. Whilst there is nothing to suggest that current volunteers in anyway do not do this, providing training would ensure this remains the case (1.3, 3.3, 2.3, 2.5)
- Wheatsheaf might consider undertaking a demographic analysis of customers to ensure that there are no communities that are 'missing out' on services, and that customers from different communities are progressing equally. Now that there is more emphasis on 'generating service users' – this information is especially relevant. This data is collected on a contract by contract basis but is 'owned' by the primes so not readily accessible. The Trust might look therefore at other ways of collecting and analyzing this data (1.3, 1.6)

The annual **matrix** Continuous Improvement Check will allow the organisation to demonstrate on an ongoing basis the developments they are continuing to make in order to support individuals <http://matrixstandard.com/continuous-improvement-checks/>. These may include the Areas for Continuous Improvement above.

Please note that annual Continuous Improvement Checks are mandatory and non-completion within the required timescale will impact on your organisation's accreditation.



## 4. Methodology

The following methods were used to gather evidence against the **matrix** Standard during the assessment process. Unless indicated otherwise, interviews were face to face.

- The Assessment took place at Wheatsheaf's main office in Southampton, although staff and customers from both Gosport and Havant travelled to the main office for interviews
- An introductory meeting with the Project Manager for the National Careers Service and QA (quality assurance) – **matrix** lead, to set the Assessment in context and discuss changes since the last Review and second Continuous Improvement Check (CIC)
- Interviews with the CEO and DCEO to discuss organisational strategy, leadership and direction
- Interviews with the Operations Manager and Project Managers for each of the three strands of work to explore contract management, objectives and performance
- Eleven advisors and one customer services assistant were interviewed to gain an insight into service provision
- Three volunteers were interviewed to understand their role in service provision
- Three partners were interviewed by phone to discuss working relationships and the benefits these provided for the organisation and people accessing services
  - CfBT – National Careers Service Prime
  - People Plus – Work Programme Prime
  - Skills Training UK – youth provision delivery partner
- 26 service users were interviewed mainly in small groups (with one, one to one interview). This provided an understanding of how the services are delivered and how people have benefited from them
- Whilst reinforcing the fact that a **matrix** Assessment is not reliant upon paper-based information, the following provided an opportunity to examine policy and practice: Strategic Plan 2013 to 2016 and draft plan for 2016 to 2019; staff survey; examples of Operations Manager's Friday Bulletins; publicity and promotional materials; individual project evaluation reports; Continuous Quality Improvement Approach; observation templates and guidance; numerous client evidence sheets; key policies; performance data; website
- A tour of the premises – examination of resources in café area – the jobs board, training board, TV screen, feedback board, hard copy resources
- Eight staff attended the feedback session on the final day

## 5. Findings Against the matrix Standard

### 1. Leadership and Management

*The way in which the organisation is led and managed to develop an effective service*

Wheatsheaf's overall aims are captured within the strategic plan. These are divided into performance improvement goals and targets, and change goals and targets, and include broad areas such as *'develop expertise to support marginalised client groups'* and *'track and develop evidence base of sustainable progressions'*. The plan then also captures annual performance measures which are updated each year such as the number of clients, the number of advice and guidance sessions and the number of job outcomes achieved. The current strategic plan runs to the end of March 2016, and the new plan, currently in draft, includes objectives such as *'to be making a demonstrable difference to the life chances of our target beneficiaries that is measured and evaluated in a robust manner and presented in a report form to demonstrate both the differences made to clients lives and also the costs avoided by the public purse'* and *'to be delivering a programme supporting clients to achieve in work progression addressing barriers faced by working clients who are on low pay and still benefit dependant'*. The CEO described how the objectives in the new plan had been put together reflecting the current environment, using input from a recent staff survey, and informal discussions with staff and board members – he described that once the new strategy is signed off by trustees he will *"go on a roadshow"* presenting the plan to staff. In addition to the overarching aims and objectives, each contract has specific aims and objectives, generally relating to engagements and outcomes – these are profiled and performance against them monitored by a dedicated staff team. As reported in previous assessments, Wheatsheaf's style of management is to give staff broad objectives e.g. *"let's look at how we can claim more job outcomes"*, rather than *"worry them too much with the specific targets, we've found that to be counterproductive"* (manager) – Project Managers are responsible for the closer analysis of performance against objectives.

Wheatsheaf's ethos and values are well embedded and understood by staff and this was apparent throughout the assessment. There is a close relationship between staff and managers with a relatively flat management structure. The CEO described *"getting out to the offices, attending events... reflecting on results, discussing challenges and looking at the future"*. Staff confirmed that the most recent all staff 'meetings' took place just before Christmas. These together with a recent all staff survey have informed the development of the new strategic plan. Senior managers also engage in national debates including submitting evidence to Commons Select Committees, and contributing to national consultations – staff appreciate the fact that managers seek to influence change, and partners also commented that the Trust will challenge and seek dialogue over issues that arise during delivery. When contract funding for the YOS initiative ended, senior managers sought charitable funding to keep the provision going because it was seen as effective and valuable work. All of these factors contribute to leadership and management being an area of strength for the Trust. On a day to day basis there are robust processes in place including one to one supervision sessions, team meetings and a formal appraisal process to support this.

The trust has in place suite of operating policies (all due for review later this year) including confidentiality and equality & diversity – these were examined during the assessment. Staff were able to describe how they implemented these policies, for example by explaining to customers how their personal information would be used and stored, who has access, and why they were asking the questions they were asking; or in relation to equality – building relationships with specialist organisations in the area to ensure that minority groups are made aware of the support available, and *“giving everyone a second chance”*. In relation to this the Trust might consider undertaking an analysis of the demographics of the customer base in order to check that all local communities are accessing services and progressing. With regard to impartiality – this is an area of strength – Wheatsheaf’s client centred approach was evident throughout interviews with customers and staff with descriptions of IAG focussed completely on individual service user’s circumstances and ambitions – no two ‘stories’ were the same, and staff were ‘proud’ to describe how they delivered bespoke IAG. The Trust’s professional integrity is evident in the way in which it carefully considers new work and how it can be delivered within the context of the ethos and values – in relation to producing the new strategic plan the CEO described how discussions had taken place around *“what contracts we want to win, if they are a good fit, remembering we are a charity first and foremost”*. The Trust has also refused to work with the funding extrapolation model preferred by the prime, choosing instead to employ dedicated staff to collect and work with actual data – the only provider to do so. There is a formal Code of Conduct for staff which covers a variety of areas including gifts and hospitality.

Staff talked about the main areas of legislation and regulation impacting on their work including health & safety, benefits rules, employment law and safeguarding. Policies in relation to these were examined (health & safety, safeguarding vulnerable adults, child protection & safeguarding). With regard to safeguarding – the Trust has recently drafted an Anti-Radicalisation Policy and produced a guidance document *‘Safeguarding people who are vulnerable to being drawn into violent extremism and/or terrorism’*, this is to be supplemented by Prevent training in a few months’ time. Once this is complete and tying in with the scheduled review of all policies, the Trust might want to consider how to ensure customers are made aware of safeguarding procedures during their ‘induction’. Benefits regulations were described as having the biggest impact on advisor’s work with the need to maintain knowledge of changes and developments – for example staff described how universal credit is about to be rolled out in the Gosport area and so staff have requested (and been provided with) training. Staff also described how most customers had little or no knowledge of regulations around permitted work and that this is also an area they needed to keep their knowledge up to date in. They also reflected on needing to review what changes might come out of the government’s budget statement (which was being announced during the assessment visit).

Working towards outcomes for customers is at the centre of Wheatsheaf’s approach. Across the Work Programme and National Careers Service contracts the ultimate outcome is a sustained employment, for youth provision this might also be the case – moving young people from *“being NEET to EET”*. However, staff described how they worked with service users to set shorter term outcome goals as stepping stones towards ultimate outcomes. *“For some customers, talking about getting a job straight away would actually demotivate them so you might have goals around developing confidence”*; *“For some young people it might be about them developing a routine initially”*; *“We find and set outcome goals...”*

*we're looking for progression between sessions, but that might be in very small ways at first*". Some customers though did talk about having short, medium and long term outcome goals. In all cases the goals and objectives are set by the customer and advisor together and are reviewed at every session – *"the plan is a living document; we review it at every session and set new goals"*. Depending on the contract, goals and progress against them, is captured in the requisite paperwork e.g. Employment Action Plan for Work Programme customers. Hard outcomes are a contractual requirement of the majority of funding streams and so are monitored on a routine basis.

In the past service users were for the most part referred to Wheadsheaf, almost all from Job Centre Plus. This is still the case for Work Programme customers, but for National Careers Service customers this has changed, with the new prime delivering directly in Job Centres, meaning the Trust has to market directly to potential customers or reach them via other agencies and services they are accessing. This has resulted in staff working to build stronger relationships with existing partners and networks, and establish new relationships. The nature of the youth work contracts has also changed and is much more targeted on those identified as NEET by the County Council or those referred by the youth offending team. The Trust has developed new publicity materials and redesigned its website, as well as developed the use of social media as a response to these changes in the ways in which it now needs to reach potential customers. Staff also described attending more events to promote the Trust – *"I did a stand at a jobs fair thing just before Christmas, had a tombola draw game which brought people over"*; *"I go to the last session [of adult education classes at a local community centre] to tell them about how we can help them take their next steps"*. An open day to welcome partners and 'friends' to the new premises in Southampton saw an immediate upturn in new customers/referrals after a period of slightly declining numbers.

Staff described how they had relative freedom to deliver IAG in ways which they felt would work best with individual customers, and how this was something they particularly valued about working for Wheadsheaf – *"They recognise your skills and experience, trust you to work with clients in the way that you feel will produce the best results"*; *"They recognise your expertise"*; *"They probably think I'm a bit mad, but as long as what I'm doing gets results..."*. Staff have also input to the new strategic plan and discussions about future practice – a recent staff survey asked questions such as *'...what have been the most effective techniques for engaging clients, achieving progression, sustaining positive outcomes'*; *'what techniques do you think work best with young people, people with a physical disability or health condition, people with mental health issues, people with an offending background'*; and *'reflecting on when programmes have gone well why do you think Wheadsheaf has been successful'*. Feedback from customers has also been used to influence provision – a number of examples were given of how service users had given feedback about the layout of the new offices and how this had been used to reinstate a reception desk and give more space when sitting with advisors at the computer. Clients are routinely asked to provide suggestions for developments and improvements but outside of comments immediately after the move, nothing germane has yet been received.

Working in partnership continues to be a strength for Wheadsheaf, and is particularly important now that the Trust needs to directly target potential customers. The Trust is very well known within the local area and one partner described how they would be *"an obvious choice"* when establishing new initiatives.

Staff described how it was a major part of the senior management team's role to *"be out there, making the relationships"*, but they also described how they themselves had built strong local networks with providers. The CEO described *"looking at stakeholder's strategic objectives and seeing how we can contribute to those"*. Many of the customers interviewed described having first come to the Trust via a third party. Advisors described how they were able to signpost and refer customers to a broad range of services because of the relationships they had built. A number of organisations and agencies now come in to Wheatsheaf to deliver services to customers, and room hire in the new building also contributes to building links. Whilst the Trust has always had close relationships with other organisations in the area, these have been strengthened more recently and have contributed to extending the organisation's reach as well as enhancing service provision.

## 2. Resources

### *The assets invested and applied in providing an effective service*

Wheatsheaf manages resources well, focussed on providing an effective and ‘enjoyable’ experience for customers. Many of Wheatsheaf’s customers are mandated to attend and advisors described how this can initially feel at odds with the ethos of the organisation, but how the solution to this was to *“make it irrelevant, make it so they want to come and then it isn’t an issue”*. Part of this is about ensuring that the facilities are welcoming, accessible spaces. As described senior managers will also endeavour to raise charitable funds to enable work to continue or to enhance provision. Careful financial management is also apparent when faced with difficult decisions – since the last assessment this has led to the closure of two sites and the mothballing of another, and unfortunately at present looking at voluntary redundancies. Part of setting up a social enterprise initiative has been to make the Trust less dependent on contract funding and there is a strategic aim of income from social enterprise making up 30% of the Trust’s turnover within 3 years. Going forward managers described how future funding would be *“more of a mosaic of different commissions”* and how this might lead to *“SMARTER ways of working, perhaps going back to multi-disciplinary teams”*. Staff reported having access to all of the resources that they needed for effective delivery, and customers commented on the quality of the environment. A senior manager said *“the aim is to keep it comfortable at the bottom”* – focus resources on delivery and look to make savings at a management level – the DCEO is leaving soon and the post is not being filled.

Staff and volunteers described how most of the resources that they used with customers are now online, however some hard copy resources are still used – for example local papers, a jobs board and a training board (staff and volunteers populate these with current vacancies and training courses available). The Customer Service Assistant interviewed described how it was part of his role to keep these up to date. Some ‘resources’ are linked to contract delivery e.g. the Work Programme’s ‘About You’ booklet and ‘Employment Action Plan’ template. Other resources referred to included the National Careers Service website (which both staff and customers noted as being very helpful), ‘I could’ and ‘Plotr’. Staff described how the choice of which resources to use with customers was very much dictated by their judgement of what each individual might find engaging and useful – very much echoing the ‘one size does not fit all’ approach of the Trust. They also described how team meetings were used to compare experiences of using different tools and resources and sharing ‘reviews’.

All advisors are expected to hold at least a level 4 IAG qualification or to acquire this within 18 months of appointment – this is noted within one of the appendices to the strategic plan which also outlines progression routes and the qualifications and experience that are required to progress to each role. The document also describes the skills and experience required of volunteers – the Trust might consider building on this to devise some induction training for volunteers to ensure that they are able to deliver ‘in the Wheatsheaf way’. Interviews with staff confirmed that they held the requisite qualification and many had originally acquired this with Wheatsheaf’s support. Managers described how when recruiting staff, their commitment to the Trust’s ethos and values was as important as their experience, and one member of staff said *“we pick the right staff – we don’t have to work hard to get customers to talk to us”*.

As described, staff are supported in acquiring formal qualifications if they do not already possess them. All Project Managers have completed PRINCE 2 qualifications since the last assessment. There are also ample opportunities for career development through promotions and taking on different roles. Most staff have been with the Trust some time and have held different positions. They described how senior managers had specifically invited them to apply for or take on new roles linking this to their previous experience or interests – *“She saw me working with young people and said – do you want to give this role a try?”* The Trust works hard to retain staff when contracts end to keep the expertise they have developed. The current Operations Manager was previously a Project Manager and the Customer Service Assistant interviewed was previously a customer. There were numerous examples of customers progressing to become volunteers and also an example of one progressing from that to become an advisor. Staff also gave examples of short courses they had attended recently – cyberbullying, legal highs, psychoactive substances, safeguarding; and one described how *“if we feel there’s a gap [in knowledge] one of us might go out and visit a specialist then bring that learning back, or we’ll invite them to a team meeting”*. Staff gave examples of training they had also recently requested both as a group (universal credit) and individually (a level 6 qualification). Staff also talked a lot about learning from each other. A partner described how she had been asked to come in and work with advisors on ‘solution focussed interventions’ and how one of her health coordinators was going to provide some input around *“getting customers to focus on something other than their health issues”*. Learning and development needs are identified through the performance appraisal process and on an ongoing basis through team meetings and one to ones.

A manager described the induction he had put together for a new (maternity cover) member of staff - this included one to one time with the CEO to look at strategy and the future, time with the DCEO to go over operations, time with staff responsible for claims and contract compliance to understand requirements, working together for a while, and the opportunity to reflect. An advisor who had changed contracts within the Trust described having an opportunity to shadow an existing advisor on that contract for a few days for his induction. All staff interviewed felt that whether they were entirely new or were changing roles within the Trust, they had had a comprehensive induction which had prepared them well for their role but that in any event *“everyone supports everyone else, so you are never left struggling”*.

### 3. Service Delivery

*The way in which the service is delivered effectively*

Wheatsheaf's services are clearly described on both its website and within hard copy promotional literature. Its renown within the area also ensures that referrers are able to give a good account of what is available when signposting customers – those interviewed confirmed that they had been given a reasonable idea of what to expect. The website describes the Trust's Employment Access Centres (delivery sites) – *'Visitors to the centres find an extensive range of free facilities. Each provides access to phones, computers and newspapers, as well as directories of vacancies and training. They are staffed with advisors, fully trained and happy to offer one-to-one assistance' and 'Wheatsheaf Trust is a charity aimed at helping anyone who needs support...All of our services are tailor-made for the individual. We sit down with them to agree what will work best for them, in a relaxed and friendly environment'*. The flyers and posters give specific examples of what customers might expect *'Whether you are in work or job seeking, you can access support and advice with [long list of areas including CVs, finding a job, apprenticeships/traineeships, and courses and learning]'*. Staff described how they use the first session with the customer to ensure that they understand what is on offer, and for those who are mandated to attend, any sanctions that might apply. Customers interviewed confirmed that they had a good understanding of what Wheatsheaf could help them with by the end of their first advice session. For some programmes this is linked to specific 'paperwork' such as the 'About You' assessment and 'Employment Action Plan'.

A key feature of the 'Wheatsheaf way' is identifying what approach will be effective with each individual customer. Staff were at pains to explain that this meant adopting a different approach for each and every individual and using their skills, experience and judgement to determine what would work best, as well as being flexible and changing their approach during their work with the service user if necessary. Effectiveness of delivery is measured in terms of progression both in relation to *"claimable milestones"* such as job and training outcomes, and smaller steps such as developments in confidence or improvements in time keeping – *"I start off by giving them an afternoon appointment then gradually bring the time forward – if they make it on time to a 9.30, then I see that as progress"*. Staff gave many examples of approaches they felt contributed to the overall effectiveness of delivery such as going at the customer's pace, the choice of resources and tools, signposting, group vs. one to one delivery, the length of time/number of sessions – *"more time with clients, more IAG, gets better results, it's a no brainer"*, and so on. From a manager's perspective, effective delivery is monitored through reviewing actual outcomes against profiled outcomes – this is reviewed on a weekly basis for most contracts (one partner described reviewing it daily) and any shortfalls identified promptly with remedial actions taken.

Impartiality and the delivery of a truly bespoke service is at the heart of the 'Wheatsheaf way' – this is echoed on the website – *'As the programmes are designed for the needs of each person, the experience for every client is different. One may involve a course based on trade skills like building or bricklaying, with one-to-one life coaching and a group camping trip. Another may involve a work experience placement at a small local company, as well as an informal C.V. skills workshop once a week and involvement in some small-scale music group projects... programmes would benefit any jobseeker, but the key is that each is designed to best fulfil the needs of the particular individual'*.



This was borne out by the descriptions staff gave of customers they were working with and by customers themselves. Staff described how they built their IAG around what the customer was seeking to achieve, but also made it clear that this was about progression, and where relevant, any mandatory requirements.

All staff described how a significant part of their role was to help customers understand that they had choices and what those choices were. An area that a number of advisors referred to was customer's understanding of the different 'types' of work they might consider (e.g. permitted hours, in work benefits) – and that part of their role was to ensure an understanding of this which often broadened service user's horizons. Staff also described working with customers to encourage them to have more than one ambition so that different avenues could be pursued. They commented that statutory providers can sometimes limit customers ambitions – *“there is a bit of a pattern of [agency] sending them here to get their CSCS card and support getting a job in construction. When you talk to them, you find they might not even have an interest in construction, but nobody has bothered to find out what they actually have an interest in”*. Customers interviewed reported having been presented with lots of different options such as short in-house courses, external short and long courses, work placements, volunteering, support in job clubs and so on. They also described how staff had helped them to identify vacancies and offered support in the application process – but in all of this they were clear that they had the choice of which options to pursue.

Staff support customers in the pursuit of their choices through a range of means – internal short courses and workshops on areas such as developing confidence and self-esteem to 'hard skills' such as interview techniques; one to one support from volunteers through the job clubs at each site; help using IT to jobsearch and apply for vacancies; access to telephones; making calls on behalf of or beside customers; advocating on behalf of customers; or accompanying them to appointments and so on. Customers gave many examples of how advisors and volunteers had supported them and noted that it was the supportiveness of Wheatsheaf staff that set the organisation apart from others they had worked with – *“they might spend an hour with me, then I know they spend hours afterwards researching opportunities for me”*. Since the last assessment the Trust has set up a social enterprise arm to *“offer stepping stone jobs to customers”* – this has successfully secured a number of contracts in gardening, cleaning and maintenance.

Part of the support provided by staff can include signposting to other organisations and lots of examples of this were given by both staff and customers. These included bereavement counselling, support with substance misuse, functional skills courses, domestic violence support, financial advice and, very commonly, housing. Because advisors generally work with customers over a period of time, the efficacy of this signposting is monitored through ongoing work – *“I always ask how they got on”*. Staff also described 'warm handovers' – supporting service users in accessing services by attending the first session with them to ensure they were comfortable at the venue and with the staff there. The effectiveness of signposting has also recently been included in an all staff survey, and has always been discussed between advisors in team meetings. Both staff and customers noted the importance of addressing issues that can be barriers to finding and sustaining employment – *“I wasn't really in a position to even think about work, I need to get all this other stuff sorted first... they helped me find people who could help me... so now I'm getting there, and can actually see myself getting a job one day”*.

#### 4. Continuous Quality Improvement

*The way in which the service provided is reviewed and improved on an ongoing basis*

Wheatsheaf monitors performance against contractual objectives and targets on a routine basis. Since the last assessment a dedicated post has been created to produce the data to enable managers to undertake this work. This ensures that any issues are picked up quickly and attended to. Historically, the Trust has also produced evaluation reports when projects (e.g. Progress, Phase 2 – viewed during the assessment) have come to an end – this ensures that any learning is not lost. Managers described how performance is also reviewed via team and manager’s meetings. The Operations Manager sends out ‘Friday Bulletins’ which report on performance – e.g. *‘Wheatsheaf made up 8.77% of starts in the South East but accounted for 17.57% of sustained job outcomes’*. These approaches have enabled the Trust to identify areas where they need to focus attention currently these relate to being able to claim more job outcomes and the need to enhance in work support to customers (Work Programme); as well as the need to increase the number of people accessing services (National Careers Service). This has fed in to the new strategic plan. Reviewing the data has also shown, that in line with the national picture, there are fewer JSA customers and more ESA customers – one manager described how this more challenging group require different skills of advisors and how this has led to training and development being provided. The CEO also described how the Board and senior management team meet to undertake *“a forensic analysis of performance and achievements against the strategic objectives”*. Objectives in the 2013 to 2016 plan that have been achieved include expansion to a new territory (the Isle of Wight) and *‘development of new income streams supportive of core delivery’* (establishment of the social enterprise). The latest annual report notes *‘We aimed to register 1000 new clients during the year and support 120 young people. We also set ourselves a target of 500 job entries for our clients across all of our activities and aimed to provide employability training to 650 participants during the year. At the end of the year we: had enrolled 1700 adults and 260 young people; achieved 668 job entries; ran training courses for 791 participants’*.

Wheatsheaf ‘celebrates’ customer outcomes and so is keen to capture these. Every month advisors are required to select a few of their current cases and write them up as ‘client evidence’ – these are then used on the website, in newsletters and are shared within teams to recognise the work of staff and inform work with service users. A review of the website confirmed that there are many ‘success stories’ and customer quotes – these are all dated and refreshed on a regular basis. Outcome data is also aggregated as part of the contract management process within which it is used to identify areas for focus – such as in work support. Staff also described how they looked at customer progress information to identify patterns and trends and use this information to devise additional input such as group workshops – *“we saw that maybe they had slipped a bit in terms of moving forward, so decided to do a group session going back to basics, look again at goal setting”*. Staff and managers described how ongoing progression was key and how they used client evidence (along with other QA approaches) to identify areas for improvement such as bringing in someone to work with staff to look at ‘solution focussed interventions’ - moving customers beyond their focus on their health issues.

The Trust collects feedback through a variety of means – the requisite National Careers Service/CfBT 4 question customer satisfaction survey, simple ‘smiley face’ feedback slips prominently positioned around every office, through the collection of quotes, and through occasional specific surveys and focus groups – but the most useful feedback comes through conversation with service users – *“I ask if they feel it went well, and if so what I did that worked... what I did for them that I will then be able to do for someone else”*. There is a feedback board on which all comments and quotes received are posted. Feedback questions include – *‘how helpful were the advisors... did you get the help you needed... how useful were the resources... how would you rate the advice and guidance’* and *‘is there anything we can improve on’*. Customers confirmed that they were aware of how they could give feedback and all said they would feel most comfortable giving feedback to their advisor. In reality very little in the way of constructive criticism is fed back, however comments were received after the move, about the absence of a reception point and about how customers disliked the arrangement whereby they sat next to advisors at their workstation when going through things on the computer – both of these were immediately addressed. Feedback was also received about the mothballing of the Millbrook site which was experienced as a loss – in response staff took time to explain the background so that now customers, whilst still not happy, understand why the Trust had to take the decision.

The effectiveness of formal partnerships is reviewed through the associated contract review meetings and attached QA mechanisms. Partners described how the Trust was proactive in relationships and keen to maintain a dialogue – *“they are quite comfortable in challenging us, I see that as a good thing, it makes you have to justify what you are asking them to do”*. Networks and other relationships are ‘reviewed’ informally generally through advisors discussing the efficacy in terms of referrals and the quality of support provided to customers signposted – this is discussed in team meetings, but has also recently been included in a staff survey. Staff described how reviewing relationships had enabled them to identify gaps and then seek to build relationships to plug these – *“money advice is a good example for this, now we have someone coming in to deliver to our customers”*; and to identify gaps in their own knowledge which they were then able to address through visits or inviting providers in to give presentations.

Wheatsheaf has a formally defined approach to QA – the ‘Continuous Quality Improvement’ cycle. This comprises three elements – advisor performance, customer experience, and contract performance. For each area there is a list of evidence sources e.g. advisor performance evidence is derived from appraisals, observations of practice and feedback from customers. Staff described how there were internal observations and observation by primes, and how observations were linked to appraisals. There are also routine file audits. There is a nominated person responsible for QA and they described some new initiatives that are being introduced – centre observations – recording ad hoc examples of practice and general reflections on the functioning of the three centres; and ‘paired working’ - focussed on peer learning and encouraging reflective practice.

There is a formal and comprehensive performance appraisal process in place, with each staff member having their review around December every year. One manager described the type of personal objectives that a member of staff might be set and how these reflected the overall strategic objectives –

*“it might be something like improving claiming job outcomes, or recognising that footfall has dropped, engaging in more outreach activities – overall the objectives will be about bringing up performance, the organisation’s performance that is, and about identifying any training and development needs”.* The objectives are then followed up three monthly or six monthly depending on job role. It is Wheatsheaf’s style that advisors have a *“subtle awareness of targets, but I prefer them to focus on the client and their effectiveness with them”.*

Use of social media has improved significantly since the last assessment with a nominated member of staff developing the use of Facebook as described earlier. In addition senior managers have started tweeting. Customers described how the Trust stays in touch through texts – *“like reminding to come in today, or when I’ve got an appointment”.* A group texting package was purchased, but was not popular with staff and customers, so is not used. There is a TV screen with rolling information about the services available on site in the reception/café area; and various websites are used to support delivery. Internally IT is used to monitor performance against contracts.

When considering continuous improvement, staff and managers described how the customer is always at the centre of considerations. All staff were asked what has improved since the last assessment and a number of examples were given – *“Embracing social media, What’s App, texting, Facebook... we’re looking to revise our IT policy as a next step so that customer machines can access social media”;* *“More signposting and referrals to other organisations – staff have developed really good networks and are using these much more”;* *“A closer eye to outcomes maybe, or maybe recording them more effectively to make sure we really are making a difference”.* Wheatsheaf is keen to ensure the quality of service on an ongoing basis – hence its commitment to maintaining **matrix** accreditation over the last twelve years; since the last assessment it has also won the ERSA (Employment Related Services Association) Supply Chain Partner of the Year Award (2014). The CEO described how he had brought in a Welfare to Work expert to *“get an external perspective on how we are doing”.* He also explained how the senior management team keep *“an eye on the ball about future DWP plans to enable us to feed in not just react”.* A manager described how one of the strategic objectives in the new plan is about external evaluation – *“so that we can blow our own trumpet”.*

## 6. Conclusion

Wheatsheaf Trust has again demonstrated that its delivery of information, advice and guidance meets the **matrix** Standard. Many of the strengths identified in previous assessments have been maintained as strengths – in particular a clear and embedded ethos and set of values which puts the service users at the centre of all provision, supported by strong leadership and management. Areas of continuous development identified at the last assessment have been progressed – development of the use of social media is worthy of a specific mention, having now become a strength for the Trust.

Going forward, just a small number of areas for continuous improvement have been identified – the analysis of demographic data will tie in well with the Trusts existing plans to evaluate provision (as captured in the objectives of the new draft strategic plan); and the provision of prevent training is already planned. Looking at improving volunteer inductions will ensure consistent delivery in line with the ‘Wheatsheaf way’.

NB: Continued accreditation is subject to annual Continuous Improvement Checks at twelve and twenty-four months following assessment and three-yearly on-site accreditation reviews. If checks/reviews are not undertaken in a timely way this will have an impact upon the organisation’s accreditation.

Assessment Type	ACCREDITATION REVIEW
Assessor’s Decision	STANDARD MET
Assessor’s Name	JANET LEWIS-JONES
Visit Date	15 <sup>th</sup> to 17 <sup>th</sup> March 2016 (2.5 days)
Client ID	C10968
Assessment Reference	PN101494

## 7. The matrix Standard Evidence Grid

Element 1 Criteria		Met	Not Met	Strength	AfCI
1.1	The service has clearly defined measurable aims and objectives which link to any wider organisational strategic aims.	✓			
1.2	The service is provided with clear leadership and direction	✓		✓	
1.3	The organisation implements policies to promote equality and diversity, impartiality, confidentiality and professional integrity in all aspects of service delivery	✓		✓	✓
1.4	The organisation complies with existing and new legislation which might impact upon the service	✓			✓
1.5	The organisation defines client outcomes and uses them as a measure of success for the service	✓			
1.6	The organisation promotes the service in ways which are accessible to all those eligible to use it	✓		✓	✓
1.7	Clients and staff influence the design and development of the service	✓		✓	
1.8	The organisation establishes effective links with other appropriate partnerships and networks to enhance the service	✓		✓	

Element 2 Criteria		Met	Not Met	Strength	AfCI
2.1	The organisation uses its resources effectively to deliver the service	✓		✓	
2.2	Clients are provided with current, accurate and quality assured information which is inclusive	✓			
2.3	The organisation defines the skills, knowledge, competencies and qualifications, in line with current national recognised professional qualifications and frameworks, for individual staff roles, linked to the aims and objectives of the service	✓			✓
2.4	Staff are supported in undertaking continuous professional development and provided with opportunities for career progression	✓			
2.5	Effective induction processes are in place for all staff	✓			✓

<b>Element 3 Criteria</b>		<b>Met</b>	<b>Not Met</b>	<b>Strength</b>	<b>AfCI</b>
<b>3.1</b>	The service is defined so that clients are clear about what they might expect	✓			
<b>3.2</b>	The service is delivered effectively to meet its aims and objectives	✓		✓	
<b>3.3</b>	The service provided is impartial and objective	✓		✓	✓
<b>3.4</b>	Clients are given appropriate options to explore and understand that they are responsible for making their own decisions	✓		✓	
<b>3.5</b>	When exploring options, clients are provided with and supported to use appropriate resources including access to technology	✓		✓	
<b>3.6</b>	Clients benefit from signposting and referral to other appropriate agencies or organisations	✓		✓	

<b>Element 4 - Criteria</b>		<b>Met</b>	<b>Not Met</b>	<b>Strength</b>	<b>AfCI</b>
<b>4.1</b>	The organisation measures and evaluates the service against its stated aims and objectives and identifies improvements	✓			
<b>4.2</b>	The organisation monitors and evaluates client outcomes to support and improve service delivery	✓		✓	
<b>4.3</b>	The organisation evaluates feedback on the service to build upon its strengths and addresses any areas for improvement	✓			
<b>4.4</b>	The organisation evaluates the effectiveness of its partnerships and networks to improve the service	✓			
<b>4.5</b>	The organisation defines quality assurance approaches which are used to improve the service	✓			
<b>4.6</b>	Staff performance, linked to their role within the aims and objectives of the service, are reviewed and evaluated to improve the service	✓			
<b>4.7</b>	Effective use is made of technology to improve the service	✓		✓	
<b>4.8</b>	The organisation continually reviews improvements to help inform the future aims and objectives of the service	✓			