Research Report DCSF-RR097

Activity and Learning Agreement Pilots

Programme Theory Evaluation

Working Paper 3
Activity Agreement Provision

Becci Newton, Claire Johnson and Harriet Fearn

Institute for Employment Studies

department for
children, schools and families

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Introduction and research aims

The Activity and Learning Agreements (ALA) Pilots were launched in 12 areas of England in April 2006. Activity Agreements (AA) operated in eight of the 12 areas and were designed for young people aged 16 or 17 who are not in employment, education or training (NEET). Young people had to be NEET for 20 weeks to be eligible. They received a weekly allowance (three variants of which were tested in different pilot areas) and continuous support, and in return agreed to take part in tailored activities designed to help them progress towards an employment or education and training outcome. Learning Agreements (LA) were aimed at 16 to 17 year olds in jobs without training (JWT) and also operated in 8 of the 12 pilot areas. Under a Learning Agreement, young people took part in agreed activities, which included undertaking a designated course.

This paper is part of the programme theory strand of the ALA Pilots evaluation. This is a realist evaluation method which focuses on identifying and testing some of the key 'theories' that underlie the ALA policy to explore which components of the policy work (or don't), how, for whom, why, and in what circumstances.

This is the third paper resulting from the 'focused studies' element within the programme theory evaluation and explores the theories related to provision and brokerage. It is based on research undertaken among a sample of young people in three Connexions Partnership areas who signed up to the AA between December 2007 and April 2008. The aim of this particular study was to gather evidence in relation to three theories:

Theory 14 (the 'menu of choice' theory): If the policy provides a 'menu of choice' to the young person then there is a greater likelihood of being able to provide them with activities they need and want in order to progress. This assumes the 'menu of choice' is varied enough to appeal to young people with different interests and aspirations and has the capacity to be tailored to what the young person wants to do and when they want to do it. Conversely, constraints on the 'menu of choice' may have a negative effect and may lead to disengagement by the young person, unless they can be overcome OR negotiated around to achieve an agreed alternative. The fit between activities is also important to ensure there is some form of development between them - although the need for this may be a constraint, from the perspective of the young person.

Theory 15 (the 'discretionary fund' theory): By giving Connexions staff access to a discretionary fund for each young person, they will be able to use it to lift specific or immediate barriers preventing the young person from progressing.

Theory 16 (the 'broker' theory): For an agreement to work, the broker must access provision that meets young people's needs, and to do this effectively a) they need to be fully informed about the range of provision available to them (including things which might be off-menu), b) they may need to negotiate with the young person about what provision best suits them/ is most appropriate and c) the provision needs to be responsive and available (ie at the most appropriate point in the young person's activity plan).

Methodology

The study was qualitative in approach and a matched-case method was used. The first stage of this was a series of in-depth interviews with 45 young people who had signed up to the AA. As part of these interviews the research team asked young people for permission to contact their Advisers (to provide the matched-case). The target of matched Adviser interviews for 30 young people was achieved. In addition to the interviews, an analysis of data from the process evaluation was conducted to gather further information about provision across the three Connexions areas in the study.

Key Findings

The 'menu of choice' theory

In practice, a mix of menu-centred and young person-centred approaches was used. Advisers in Areas 1 and 2 tended to use a list, calendar or diary of activities with young people to prompt their choices, however they would try to source off-menu provision if the young person wanted it. Advisers in Area 3 did not use a list directly with young people although they sometimes used a training directory to provide information on work-based training or course options.

The 'menu of choice' appeared to be varied enough across all of the three Connexions areas, despite the difference in approaches they used to setting out the 'menu' to young people. There were few examples where young people had not been able to do something which they really wanted to do, and many examples where young people had been able to take part in a wide and varied range of activities (in particular those who did not have a clear idea about their future goals, who could try out various different areas of work or learning through taster-style provision).

Some provision gaps were identified. The most consistent gap across all the three areas was a lack of work experience placements. This was a particular issue for work-focused young people (in particular if they wanted to do some work-based training).

A few young people had missed activities because they felt they had not particularly wanted to do them, or had felt uncomfortable about saying 'no'. This was generally in cases where there had been a more menu-led approach.

A key aspect of the Adviser's broker role was about negotiating constraints: however, some constraints or barriers were difficult to overcome purely via more flexible provision because they were associated with issues centred within the young person, such as severe lack of confidence in group situations or health barriers. In these cases referrals to specialist support services was needed. Some Advisers felt that the 20 week AA period was not long enough to achieve outcomes with young people in these situations, especially if the main problem did not become apparent until several weeks into the AA.

The 'fit' between activities and how they were sequenced was important to build progression into the AA and to ensure that young people recognised the benefits of each activity they had done. Activities did not necessarily have to be incremental - there was a role for trying things out and changing track if the young person found they did not want to pursue a particular course of action. Having a broad enough menu of choice to provide the flexibility for young people to do this was crucial, so that they did not feel 'boxed in' to a particular pathway.

Building in fall-backs and safety nets was a useful ploy adopted by Advisers to ensure that the young person was progressing in different ways.

Overall, the AA was generally flexible enough to be tailored to what young people wanted to do and when they wanted to do it, although this was inter-dependent on the other provision theories. Use of the Discretionary Fund and brokerage from the Advisers were crucial components of whether the menu could be tailored to individual needs and could provide timely provision.

The Discretionary Fund (DF) theory

The DF was seen as an extremely useful tool by both young people and the Advisers. Advisers appreciated the flexibility it gave to the programme and felt it allowed them to be more person-focused when exploring possible courses or equipment the young person needed. Young people in turn appreciated that they could get help with work or course-related equipment they may need. Overall young people had a sound, if not detailed, understanding of DF.

The DF was seldom used to buy in bespoke provision or courses for an individual young person, but was more often used to create new, tailored provision that could benefit a number of young people with similar needs. This new tailored provision helped to build a more comprehensive 'menu of choice' in all three regions. All Advisers felt that the DF was an important part of the programme as it allowed young people with very specific or unusual career goals to benefit from the AA.

Some Advisers felt that there could be more flexibility in the ceiling of DF as some young people did not need any money spent either on bespoke courses or equipment. Their 'budget' could be used to offset equipment or provision for young people who needed more financial support[1].

Spending the DF was not taken lightly by either young people or Advisers. Advisers expected the young people to prove that they deserved the money spent on them and young people were aware that there were limitations to what could be spent.

There was little difference between the two urban areas in their approach to using DF for bespoke provision and equipment. The rural area spent less on bespoke provision for individuals due to the increased costs of travel. They worked extremely hard to make up for the lack of funds by spending the DF on tailored courses or opening out provision explored for one individual to a wider range of young people.

Overall the results of the study indicated that the DF helped to remove specific or immediate barriers for the young people so they could progress. This supports the theory regarding DF that was identified during the programme theory process. The study also found that having the DF helped to broaden the 'menu of choice' available to young people, and assisted the brokerage role by involving young people in decisions about how the DF might be used.

The brokerage theory

Brokerage was a key element of the AA for young people and their Advisers. It offered a link between available activities and meeting the needs and aspirations of young people. All young people valued the support from their Advisers and the option of negotiating activities rather than being told what they would do.

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[1] Local guidelines may exist on the amount of DF available to individuals, however central policy envisages some flexibility in its use.

Advisers' experience of researching and sourcing activities in addition to those available through the menu led to broader views of available provision which could then be 'sold' to young people. Important to this were formal and informal mechanisms for Advisers to share their experiences with others.

However, examples from one of the urban areas particularly demonstrated that certain young people could be encouraged to research the specialist provision they wanted. This process was felt to deliver benefits to the young person in terms of study skills but also in encouraging them to find out more about their chosen option to help clarify its appropriateness.

All Advisers emphasised the need to set out the benefits of provision to ensure young people were involved in activities that would meet their needs. With some young people, the process of getting them signed up to provision that was peripheral to their core goal was sometimes lengthy and this demonstrated the role for the regular review meetings. These established a supportive working relationship through which Advisers could raise opportunities and challenge perceptions. However, some young people needed little, if any, persuasion to engage in provision and, in these cases, the negotiation might focus more on establishing a learning or work path, best suited to the individual, so that activities could build towards this.

There was little evidence that a delay to an activity caused particular difficulties to individuals. The reason for this was the Advisers' skills in setting expectations appropriately: if young people could see that provision that met their core goal was scheduled, they could be persuaded to participate in peripheral and contributory activities in the interim. In this way, activities could be used as an incentive to help sustain engagement in the AA.

There was evidence that provision could come *too soon* for certain young people whose underlying barriers did not become evident until they tried to engage, or later in the programme. Advisers recognised the potential danger in this: if a young person tried to engage, but failed, it could have a negative effect on their confidence and self-esteem which in turn could impact on their outcomes at the end of the Agreement.

A final point is that some Advisers noted that the AA is not appropriate for some young people, for instance those with significant personal or contextual barriers to engagement (such as health / mental health problems or insurmountable problems in the home environment). For some of these young people, the 20-week timescale was not long enough and the AA did not offer the depth of emotional or psychological support these young people required. Often these young people had been referred for additional counselling, treatment for substance misuse, or other medical or personal-related support.

1 Introduction

The Activity and Learning Agreement (ALA) Pilots were launched in 12 areas of England in April 2006. Activity Agreements (AA) were designed for young people (aged 16 or 17) not in employment, education or training (NEET) and operated in eight of the 12 areas. Young people had to be NEET for 20 weeks to be eligible. They received an allowance (three variants of which were tested in different pilot areas) and continuous support, and in return agreed to take part in tailored activities designed to help them progress towards an employment or education and training outcome. Learning Agreements (LA) were aimed at 16 to 17 year olds in jobs without training (JWT) and also operated in eight of the 12 pilots areas (ie both pilots operated in four areas and they each operated separately in four others). Under a LA, young people took part in agreed activities, which included undertaking a designated course. If successful, young people may receive a monetary bonus (and in two areas their employers received wage compensation).

The evaluation has three main strands:

- **a quantitative element**, using surveys of young people to measure the impact of the pilots in comparison to a number of control areas

- **a programme theory element**, focusing on testing some key aspects of the policy to identify what works or doesn't and why

- **a process evaluation**, examining how the pilots have been set up and delivered, and the main implementation issues.

1.1 What is 'programme theory evaluation'?

Programme theory evaluation is considered a useful tool for conceptualising programmes, guiding evaluations, planning empirical research, and analysing *why* programmes are successful (or not). It seeks to identify the 'theory of change' that lies behind an intervention and assess to what extent, why and how this change has occurred. In doing so, any unintended as well as intended outcomes are considered. The results of this type of evaluation are *explanatory* rather than providing a clear-cut answer on whether a policy 'works', and can be fed back into the policy design in order to make improvements.

The guiding principle of this approach is that policy interventions are originally underpinned by theories. Pawson et al. (2004) sum up the basic 'if-then' logic of this as follows:

> *'If we deliver a programme in this way or we manage services like so, then this will bring about some improved outcome.'*

The theories that underpin interventions are informed by assumptions about a) the reasons driving behaviour and b) what might cause that behaviour to change. But these theories are also mediated by individual, social and institutional effects that influence how policy is delivered. Hence, a key focus of programme theory evaluation is to examine how policy mechanisms are *supposed* to work and compare this to how they *do* work. The evaluation can then assess whether there is any gap between the two, and if so, explore the extent, nature and causes of that gap, and resulting impacts on outcomes.

The outcome is not to provide an unequivocal answer about whether the ALAs ‘work’, but rather to highlight the components that inform the successful operation of the policy (as well as ones that hinder it). This will help to refine the theories implicit within the policy design to better articulate what works, for whom, how and in what circumstances, so that this learning can be embedded into any subsequent revision of the policy, or nationwide roll-out.

The programme theory approach to evaluation adopted by this study has two main elements. The first is to identify, assess and refine the theories that underpin the ALA policy (the ‘theory elicitation’ stage). The second is to then test these theories via empirical research, of which this study forms a part.

1.2 Background

The theory elicitation stage presented 25 different theories and sub-theories which were formulated based on a review of related research and in-depth interviews with a number of key policy architects and stakeholders. These theories and sub-theories were collated under different elements of the ALA policy: financial incentives, agreements, personalised support, flexible options, brokerage, and progression. Earlier focused studies concentrated on the role of the financial incentives in participation in the AA and the role of personalised support in participation in the LA. Focused Studies 3 (Activity Agreement) and 4 (Learning Agreement) consider flexible options and brokerage.

1.3 Hypothesis and research aims

This paper is based on research undertaken among a sample of young people in three Connexions Partnership areas who signed up to an AA between December 2007 and April 2008. The aim of this particular focused study was to gather evidence in relation to the following theories:

Theory 14 (the ‘menu of choice’ theory): If the policy provides a ‘menu of choice’ to the young person then there is a greater likelihood of being able to provide them with activities they need and want in order to progress. This assumes the ‘menu of choice’ is varied enough to appeal to young people with different interests and aspirations and has the capacity to be tailored to what the young person wants to do and when they want to do it. Conversely, constraints on the ‘menu of choice’ may have a negative effect and may lead to dis-engagement by the young person, unless they can be overcome OR negotiated around to achieve an agreed alternative. The fit between activities is also important to ensure there is some form of development between them - although the need for this may be a constraint, from the perspective of the young person.

Theory 15 (the ‘discretionary fund’ theory): By giving Connexions staff access to a discretionary fund for each young person, they will be able to use it to lift specific or immediate barriers preventing the young person from progressing.

Theory 16 (the ‘broker’ theory): For an agreement to work, the broker must access provision that meets young people’s needs, and to do this effectively a) they need to be fully informed about the range of provision available to them (including things which might be off-menu), b) they may need to negotiate with the young person about what provision best suits them/ is most appropriate and c) the provision needs to be responsive and available (ie at the most appropriate point in the young person’s activity plan).

The overarching aims of the project are to:

- Explore the extent and impact of choice of provision on young people's progress - do they really get a 'menu of choice' and what happens when they want to do things which are 'off-menu'? In what circumstances does this occur, and among which types of young people?

- Examine what constraints on choice exist - from the perspectives of the young person *and* their Adviser.

- Explore whether and how such constraints are overcome - and the impact when they cannot be overcome. What impact do such constraints have on the Adviser / client relationship and on the young person's engagement? Is this different under different circumstances and for different young people?

- Investigate how choices are *negotiated* between the young person and their Personal Adviser (PA) or project worker. What happens when there is a gap between what the young person wants to do and what the Adviser a) deems appropriate and b) can actually offer? In what circumstances can such gaps be hurdled, and for which young people?

1.4 Methodology

1.4.1 Research design

The methodology was based on a qualitative, young person-centred case study approach. Our strategy was to interview the young person, and then ask for permission to approach their Adviser for interview. In addition, data from the process evaluation was reviewed. The research design comprised:

- 45 in-depth qualitative interviews with young people currently or previously participating on the AA

- 30 in-depth qualitative matched interviews with young people's Advisers

- a review of interview data from the process evaluation focusing on provision, including material on providers' views of the AA.

1.4.2 Area selection

Unlike the earlier study into the financial incentive (Johnson et al., 2008) the particular variant of AA on offer was not integral to the research since provision was unlikely to differ by variant. However, the process evaluation had shown that Connexions Partnerships differ in terms of range and accessibility of provision. Depending on the set-up and size of the Connexions Partnership there can also be differences *within* areas, for example between local authorities. Our priority was to ensure coverage of different contexts and that the areas covered by the research included urban, suburban and rural settings.

1.4.3 Generating the sample

Due to data protection restrictions, it was necessary to liaise with each Connexions Partnership to generate the sample. All three areas were asked to conduct an opt-out among all young people who had signed up to the AA within a specified timeframe. The timeframe varied slightly, depending on the volumes of young people in each area, but concentrated on joiners from the preceding 3-4 months.

During the opt-out period, only a small number of young people said they did not wish to have their details provided to IES. Once this period was over, the remaining contact details were supplied to IES and stored securely in line with data protection regulations.

1.4.4 Fieldwork

Recruitment for the study was conducted by telephone. A small-scale pilot was undertaken in mid-April in order to test the research instruments and the approach to fieldwork. Six face-to-face interviews with young people were booked for the pilot, of which four were conducted (one cancelled and one was a ‘no-show’). All four young people who were interviewed at this stage gave permission for their Adviser to be contacted. The Advisers working with three of the four ‘pilot’ young people were then interviewed. After the pilot, only minor revisions were made to the topic guides.

Main-stage fieldwork took place between mid-April and the end of May 2008. All interviews were undertaken by Criminal Records Bureau (CRB) - checked researchers from IES. An incentive of a £20 High Street voucher was offered to young people to take part in an interview. The aim was to conduct 45 interviews with young people who had signed up to the AA and 30 interviews with their Advisers. Some Advisers were interviewed about two different young people. Although scheduling of the Adviser interviews took longer than anticipated, the method was otherwise unproblematic and the target numbers of interviews for young people and Advisers were both met. There were a small number of no-shows and cancellations among young people but replacement appointments could be found. Almost all of the interviews with young people were undertaken face-to-face, with a small number of ‘mop-up’ interviews carried out by telephone towards the end of the project. Around half of the Adviser interviews were conducted by telephone.

It should be noted that this study was qualitative in design and therefore, although designed to map the various types of pathways that young people followed through the AA, it is not possible to assign quantitative measures to these.

All the young people’s names have been changed in this report to protect their identities.

1.5 Structure of the Working Paper

The remainder of this Working Paper is structured as follows:

- Section 2 explores young people’s contexts and their initial plans when they joined the Activity Agreement
- Section 3 investigates the ‘menu of choice’ theory
- Section 4 examines the ‘Adviser discretionary fund’ theory; and
- Section 5 assesses the ‘broker theory’.

The concluding section assesses the research findings in relation to the original hypotheses.

2 Young People's Contexts and AA Starting Points

In this section we explore young people's educational and employment contexts prior to joining the AA. We then outline the broad types of activity envisaged on the AA and fit this into a framework linked to young people's contexts and aspirations.

2.1 Experiences prior to AA and why young people signed up

Young people's experiences at school varied: some had quite enjoyed it and got on reasonably well, others liked the social aspect although did not get on well academically. A few had been bullied and were relieved for school to come to an end. Some young people had experienced significant difficulties that led to a withdrawal or exclusion from school and attended either a pupil referral unit or college to complete their compulsory education. A couple mentioned home-schooling (one as a result of school exclusion, the other had been withdrawn from school by their parent because of concerns about bullying). Another couple of the young people in the study sample had stopped attending school at around the age of 14 and had seemingly fallen through the education net and started work instead.

Most of the young people had left school without any qualifications or with qualifications at very low GCSEs (grade Ds and below). Many of these young people had problems with literacy, numeracy, or both. A handful of young people in the sample had achieved quite high GCSE grades including a sprinkling of As and Bs.

The majority of the sample had become Not in Education, Employment or Training (NEET) following school. Many of them just wanted to work but had not been able to find or hold down a job. Some had been considering college but were thwarted by their own lack of motivation to submit an application in time, or because their qualification grades were inadequate. In one case, a young person had to leave the family home before her GCSE results arrived and she had been unable to start college because she did not know her grades.

A few of the sample had found work on leaving school although for most this had not lasted long and they had subsequently become NEET. A smaller number had entered college although most of these had 'dropped out' in the early stages as it did not meet their expectations. Some young people had attended one year programmes and achieved a Level 1 or in some cases a Level 2 qualification.

When asked about their reasons for joining the AA, most young people said it had been because they wanted help. While the incentive payment might have been a linked factor in their decision, help to improve their chances of employment, or to gain a college place, was far more frequently mentioned as the main reason. Only a small group mentioned that the money had been the main motivator (see Johnson et al., 2008[1] which shows that the incentive alone is not the attraction of the AA. For many, the decision to join the AA was motivated by the incentive linked to the one-to-one support, activities, meeting new people or relieving boredom).

[1] Johnson C, Newton B, Usher T, Hillage J 'Activity and Learning Agreement Pilots: Programme Theory Evaluation: Working Paper 1: Incentivising Participation in Activity Agreements', DCSF Working Paper RW028, January 2008.

2.2 The framework of provision for Activity Agreements

The Activity Agreement is designed to be a *personally negotiated* action plan between a Connexions Personal Adviser (PA) and the young person, identifying specific steps they should take to move into education, training or employment (preferably with learning) in return for access to financial support. The AA itself can last up to 20 weeks and, within this time, the policy envisages that young people will require a range of activities to enable them to progress. The amount of time spent on activities per week can be built up over the 20-week period, at the discretion of the Adviser and depending on the needs and progress of the young person.

Table 2.1 shows the broad types of activities that can be done as part of the AA and these can be seen as 'journey-based' in concept[1]:

- **Engagement at the outset** (with reviews throughout) focusing on assessing the aspirations and needs of young people. This type of activity enables barriers to be identified and where possible overcome through the other types of provision.

- **Development and personal development** help to break down immediate barriers to enable young people to interact with longer term study and vocational options as well as gain valuable skills and certificates.

- **Exit activities** at the end of the AA aim to ensure young people have goals and plans to sustain their engagement.

Table 2.1: The framework of activities

Type of development	Examples
Engagement activities	Introduction; assessment of strengths and areas for development; individualised AA; weekly monitoring; third-party verification (eg of attendance at activities); acknowledgement of achievement; planning next steps; CV development; Forward Action plan.
Development activities	Brokered and funded activities - part-time/bite-sized/other/part of mainstream provision or commissioned for AA. This may include basic skills provision, vocational tasters and personal development. Activities ideally will be accredited (ie lead to a qualification or contribute towards a qualification).
Personal development activities	Aim to develop key skills to raise self-esteem and social / interpersonal skills eg: budgeting skills; citizenship; creative drama / music / media; job clubs; life skills; managing aggressive behaviour; mobility and travel skills; motivational skills/coaching/work with mentor or peers; outward bound challenge; parenting skills; preparation for work courses; sports/coaching activities; summer activity programmes (eg Positive Activities for Young People etc.); vocational tasters; youth service programmes; volunteering.
Study skills, including basic skills	Taught classes and hands-on experience - Skills for Life; financial options for education and training benefits; research and investigation projects.
Employability skills	Bite-sized vocational tasters; work experience; preparation for workplace (punctuality, team work, customer service, dealing with tensions, taking instructions, corporate structures, roles and responsibility, problem-solving); short work-related courses; job search skills; interview skills
Exit activities	Action planning; job and opportunity searching; interview practice; interviews; visits to college or work-based learning providers; personal planning activities.

Source: AA guidance documentation, DCSF

[1] This 'journey-based' concept of engagement-development-exit activities is similar to the approaches used in many welfare to work programmes as well as other programmes aimed specifically at young people, such as Positive Activities for Young People (PAYP). See, for example, CRG Research (2006).

This provided a useful framework against which to review the activity programmes of the young people involved in this study. These programmes necessarily varied and a key factor in this was the young person's focus at the outset and how this developed as the AA progressed. We have conceptualised the types of activities and 'journeys' in which young people might engage in Table 2.2.

This framework is simplistic and some cases do not sit as easily in the categories as others, but it is useful as a starting point. Some young people, for instance, might have a very fixed idea of what sort of job they wanted at the outset of their agreement, while others who wanted to work may not have clear ideas of the career they would pursue, or alternatively, a clear idea of what was required to enter their selected career path. In other cases, there might be personal or contextual barriers which meant that while they might have a particular work or learning focus, the barriers were so great that they might have a long way to travel before they were ready to achieve it.

We test this framework in our assessment of each of the theories and explore the circumstances in which they influence activity programmes. A key factor was that the young people's starting points developed over the course of the AA and some changed altogether: provision needed to be flexible enough to cater for this.

Table 2.2: Ideas for framework on different 'types' of young person case

YP priorities at start of AA	Work-focused	Learning-focused	Lacking clear focus
Characteristics of the young people	Often older Some limited work history / experience - possibly in informal or temp jobs Less well-off (need money) and may be under pressure from family to get a job	School ok - not completely turned off - might have reasonable GCSEs Want to do a job which they realise requires qualifications/ training Not getting pressure to work from family / peers	No clear idea of what they want to do (job / learning) Limited or no work history / experience Isolated socially / geographically Low confidence/ self-esteem a more common issue Possible wider barriers eg substance misuse, health / mental health, housing problems, criminal activity
CORE activities/ goal	Job search CV Interview skills / employability skills Job clubs	Preparation / application for college or training Possibly key skills	Personal development activities: confidence-building, outdoor challenges Teamwork
PERIPHERAL activities	Training / short courses Possibly key skills Voluntary work / work placements	Training / short courses Job or learning tasters CV	Careers advice / intensive IAG Work sampling / voluntary work and / or learning tasters Key skills Possibly training / short courses CV
Other activities (less common/ more case-specific)	Confidence-building Personal development activities	Voluntary work / work placements Confidence-building Personal development activities	

Source: IES

2.3 AA Adviser roles and team structures

The majority of Advisers interviewed in this study had worked on the AA for at least a year, and many since its implementation. In all areas, Advisers had a significant career history in working with young people. Many had a previous role in the Positive Activities for Young People programme (PAYP) or as a school-based or hub-based Personal Adviser for Connexions.

Advisers fulfilled a multiple role including recruiting young people to the AA, sustaining engagement, carrying out weekly review meetings, sourcing and brokering provision, and planning for exit activities. Caseloads varied, and Advisers working solely on the AA were usually dealing with between 16 and 20 young people at any one time.

The structure of teams and types of roles that Advisers were involved in varied between the case study areas:

- **Area 1 - Large urban area:** While Advisers were structured into teams which covered specific localities, a lot of training provision was delivered directly by Connexions. In addition, young people could access a Connexions Access Point away from their home locality. Where bespoke provision was required, most often the brokerage and contract arrangements were led through the pilot manager, although Advisers could also source provision themselves and get it approved centrally.

- **Area 2 - Mainly rural:** Advisers worked in teams to cover specific and quite large areas. The team in each locality sourced and brokered provision, although contracting arrangements were managed centrally. Advisers had a role in tailoring provision to meet the needs of AA participants, but they tended to allow young people to choose from a set list for ease of planning in such a large and rural area.

- **Area 3 - Mixed urban and suburban:** The Advisers here also worked in teams and covered specific boroughs. Each Adviser had responsibility to broker the provision that individuals required and all had been involved in sourcing bespoke activities. As in the other areas, contracting processes were managed centrally.

3 The 'Menu of Choice' Theory

This section focuses on the 'menu of choice' theory:

Theory 14 (the 'menu of choice' theory): If the policy provides a 'menu of choice' to the young person then there is a greater likelihood of being able to provide them with activities they need and want in order to progress.

In the rest of this section we break down this theory into its component parts and address each in turn:

- Is there a 'set menu' of activities or is it a 'menu of choice' - that is, to what extent is the AA led by what is available, or how far is it young-person centred?
- How important is choice to the young person? Do they feel comfortable about turning activities down - and what happens when they do not?
- The 'menu of choice' needs to be varied enough to appeal to young people with different interests and aspirations and have the capacity to be tailored to what the young person wants to do, and when they want to do it. To what extent is this the case? What happens when provision is not available or is not sufficiently tailored?
- Constraints on the 'menu of choice' may lead to disengagement by the young person, unless they can be overcome or negotiated around to achieve an agreed alternative. How is this done, and what happens when it is not possible?
- The fit between activities is important to ensure there is some form of development between them. How far do Advisers plan this and how far do young people recognise that they have had some progression?

Evidence is drawn predominantly from the young person and Adviser interviews, and is presented in a 'case-study' style format wherever possible.

3.1 Is there a 'menu of choice'?

3.1.1 Getting started on the AA

Young people tended to enter the AA with a view to finding a job, and less commonly, aiming to find a course. Some young people were lacking in any real focus about what they wanted to do in the future (see Section 2.1).

Almost all of the young people described how their initial meeting was a 'getting to know you' session. The Adviser would tell them a bit about the AA but spend more time talking about them - their background, their interests, what had held them back in the past, and what they hoped for the future.

There is flexibility for the engagement phase to be tailored to the young person

Some young people were signed up on particular activities straight away, especially if they had signed up to do the AA with a certain course or activity in mind, or with a specific aim, such as meeting new people. This varied to some extent by whether they were work-focused, learning-focused or lacking in focus, but depended more on their self-confidence. Some who were more job-ready moved directly to 'exit activities' such as job searching and interview practice.

Harry (Area 2) joined the AA because he wanted help to find work. He had a vague interest in doing an Apprenticeship in construction, but his GCSEs were very low. He also wanted to meet new people as he was quite isolated both socially and geographically. He was keen to start on an activity from the first day that he met with his Adviser, and signed up to take part in a 2-hour team building, problem solving and confidence workshop that very afternoon:

'When I went to my Adviser she was like, "Oh normally it's like one or two weeks before you want to start" and she was like, "How soon do you want to start?" and I was like, "As soon as I can". So she was just like … someone wanted to drop out of a session so she was like, "If you want you can go along today", and so I was proper wanting to get involved and everything.'

The workshop ran regularly every week and therefore when someone dropped out at short notice it was relatively easy for his Adviser to offer him the place. His Adviser felt that a more challenging, motivational approach suited some young people:

'Technically on the AA we start the young person with a few hours and work them up to 16. I would start mine on 16, and again with Harry I would say, "Look, look at you, you're capable, you say you have a problem with strangers but you sat in a room with me. You're making eye contact. You're talking to me, you're being coherent …. Do you want to go straight in there or you can start with a little, but I don't think you need to". And they always go, "OK I'll do it". It's about positive support and positive motivational skills I think.'

In contrast, for others it took a much longer series of meetings with their Adviser before they even started to talk about potential activities, much less sign up to do any. This was particularly the case where young people had no real focus about their future career plans, very low self-confidence, and/or multiple barriers which could often take several weeks to fully emerge, such as health or family problems.

Jackie (Area 1) had started the AA to get some help with finding a course. She had no prior qualifications and had attended specialist provision because of bullying at school. She was vaguely interested in doing a Hair and Beauty course but had not pursued it due to her severe lack of confidence and lack of entry qualifications. At the time of the interview she had been on the AA for approximately 6 weeks and had not yet started any activities. She described how her Adviser meetings were mainly focused on how she felt about herself, and identifying her interests, leading on to discussions about what sorts of activity she would like to do:

'I have done stuff, there is a thing about how you feel that you are and that, and they build it up and I really enjoyed it. So you know what you feel like and you tell them what you think you are now and things like that …. It's to see how I feel about myself because sometimes I am embarrassed and I won't go. If I didn't know you and you were in a big room with lots of people I will sit there and be embarrassed to see how I feel. If I was here now with you and I did it and I said "Look I feel okay", so it [confidence rating] would be like 5.'

Time invested in the engagement phase could eat into the rest of the 20 weeks

Advisers appreciated the flexibility they had to tailor this engagement phase to the needs of each young person, although some pointed out that there was a balance to be struck between spending time getting to know the young person and getting them to a stage where they participated in some other activities beyond the weekly Adviser meetings. This stage could be further prolonged if there was a change of Adviser part-way through, for example if someone went off sick:

'I picked up from another of my colleagues who went off sick, so the first few weeks we took time to just know each other - it takes time to actually know what they are, where they are coming from and what has happened in the past. Now the database we have doesn't talk much of these sort of things - personal relationships and all that kind of thing - so this lad, I think 15th or 16th week, finally I had to draw a line and say that "Ok now, we have known each other for a pretty long time, we've been talking of doing things but we haven't done anything and four weeks down the line you will be off the project".'

Adviser, Area 3

The length of time required by some young people before they were in a position to start more formal activities such as work/college preparation or vocational skills development was cited by some Advisers as impacting on how well subsequent activities could be fitted within their remaining time on the AA. This impacted on the extent to which (hard) outcomes could consequently be achieved. Advisers felt that working with those young people who required extensive support and personal development work before they could fully engage in some of the more work or learning-focused activities, meant that the 20 week period was not long enough for some of the hardest to help.

3.1.2 How are activities presented?

Young person-centred or menu-based approaches

Young people were asked how they found out about what activities they could do on the AA, and their responses varied somewhat by Connexions Partnership area. Some Advisers described how they might use a list or timetable, especially if the young person was very unclear about their interests or future goals, when it could provide a useful 'prompt' to motivate them into trying out a few things as a starting point. In general, young people who were lacking in any initial focus tended to start off with a more menu-based approach, whereas the approach for those who had a clearer idea about their work or learning goals tended to be more young-person centred.

In Area 3 in particular, almost all of the young people described how they had spent varying amounts of time talking to their Adviser about their current situation and future goals, before identifying an activity or activities that they wanted to do.

'I never say, "That's what we've got, have a look through, see what you think." The ball is firmly in their court. Most people do have a good idea of what they want to do. And if they don't then there are services or facilities or other things we can call upon to help generate ideas and ways forward. So there's never an offer of, let's say, "This is what we've got".'

Adviser, Area 3

Advisers in Area 3 did not appear to use a list or timetable of activities directly with young people, although they clearly knew which provision was available locally and what had been used successfully before. They also had a training directory, and other material such as case studies, to provide examples of the range of activities available and to help stimulate ideas among those young people who lacked a clear focus about what they wanted.

'With regards to training opportunities we have a directory which young people can browse to help generate ideas. We also have case studies and examples of activities that other young people have done to spark a bit of interest and to make young people aware of the diverse range of opportunities that we've got to offer.'

Adviser, Area 3

In other areas the situation appeared to be slightly more mixed. Some young people had discussed activities with their Adviser in an individual-centred way, whereas others had been shown a list or timetable of activities that were available and this had formed the basis of the discussion.

> *‘She got this little thing out - this little chart - and it had the activities on and said, “Well this is happening on Wednesday, it’s blah blah. If you want I can take you”.’*
>
> Suzanne, Area 1

> *‘Well, they give you a list of activities and it’s things like sport or going to the gym - ridiculous things like going to the zoo. Things that aren’t really that productive but then again they have got me into [literacy and numeracy] which was good, and they gave me guitar lessons twice a week, which I love doing.’*
>
> Tom, Area 2

The menu is useful where it is difficult to arrange individualised provision

The other main example of where a list or timetable of provision was used was generally where provision was more limited, in terms of availability or accessibility. In Area 2 it was generally more difficult than in the other areas to source individualised provision, due to the large geographical coverage and rurality of some locations. This meant that a varied ‘menu’ of provision had been drawn up and was run on a calendar basis so that young people could benefit from a ‘carousel’ of different activities run at regular intervals:

> *‘We kind of plan. The rock climbing and high rope work we have to book quite far in advance. We have a diary, we would try and book four months [ahead]. So a lot of the provision we already had, but because we’re focusing on key skills it’s appropriate to most of the young people we get on the AA.’*
>
> Adviser, Area 2

Most young people felt that the activities on the list were appropriate and interesting enough for them to be able to choose activities they wanted from within it.

Rob (Area 2) left school at 16 without any GCSEs as he had been put down a year, and therefore was able to leave before his examinations year. After school, he had not found any work or training. While he did not have clear plans when he left school, by the time he joined the AA he had aspirations to get work in construction or farming. He was impressed by the range of activities available as there were plenty of certificated courses that would help him find work and make up for his lack of qualifications.

‘I’ve got one [menu] here somewhere … it says like - it says at the top “Activity Agreement” and underneath it’s got four headings and underneath there you’ve got lists of what comes underneath your headings: First Aid, Health and Safety, Driving Theory, Quads, Dumpers, Diggers. [It has all] the courses I want for tickets and that is Fork Lift, Dumper and Digger, and Tractor. I’m going to see if I can add quad biking to that, or paint balling, and I’ve also done my English and Maths.’

> *‘Basically he showed me the calendar and the training that was going on and there was business, youth, babysitting courses and he said it was up to me, that no one was going to tell me what to do and that I choose. I have always wanted to do health studies or something to do with children and childcare was obviously there, so I was alright’.*
>
> Adya, Area 1

However, the drawback of this approach, in the view of a minority of young people, was that it could become ‘boring’ after a while, if they got into a pattern of doing the same activities without any sense of challenge or progression.

> Shelly (Area 2) had joined the AA after completing a year of college and a short period working, before she became NEET. She mentioned she had ADHD and anger management issues. She left the AA towards the end, partly because her Adviser changed and partly because she had become ‘bored’ with the activities on offer.
>
> *‘A big list and I chose a few things. I chose quad biking and horse riding and water sports, but they didn’t do watersports in the end because they didn’t have enough time in the week. Because you have to do like [driving] theory and [literacy and numeracy], which you have to do …. It was all the same apart from week [xx], then on that Monday it was quad biking for one day. Then it was the same again after that, apart from week [xx] when my Adviser changed.’*

Some activities are seen as ‘part of the deal’

The other issue was that some activities within the menu were seen to be a standard part of the AA and to some extent treated by young people as ‘compulsory’. This tended to be mainly in Area 2, where several young people mentioned being ‘told’ to do various activities such as completing an online careers assessment programme, literacy and numeracy courses, or weekly group discussions with other young people, in addition to their one-to-one Adviser meetings.

> *‘It [literacy and numeracy] was something I was told to do …. It was all right at first.’*
>
> Shelley, Area 2

> *‘Connexions just told me to turn up that day [for an online careers assessment] …. If I’d had a choice then I would rather not but perhaps it’s necessary for Connexions’ records.’*
>
> Robin, Area 2

It should be noted that almost all of the young people who mentioned these types of activity as being ‘part of the deal’ were not necessarily talking about them in a negative way, but rather flagging up that they were Adviser-driven rather than being done out of choice.

Some young people need more upfront information about their activities

Although Advisers stressed the importance of providing young people with enough information to make informed choices, a few young people appeared to have selected courses without having a very clear idea about what that course would entail, in effect taking ‘pot luck’ that it would be appropriate for them and would cover what they thought it did.

Robin (Area 2) had been home-schooled and wanted support to do numeracy and literacy qualifications, improve his employability skills and improve his self-confidence. He had been given a list of activities to choose from and had found most of what he was looking for on the list. However, he seemed unclear about some of the courses he had selected, on social skills and managing money:

'Now I think about it social skills might be more to do with managing anger and people who have quite serious social problems perhaps - I don't know exactly what that course is about … I think I just saw it on the list and thought I need to get a bit more confidence when dealing with people, so I signed up for that one but that might be for - I don't know what sort of people - it might be intended for disruptive teenagers for all I know.'

'I'm not exactly sure I want to do that one [managing money] because I don't know exactly what it involves. I did pick it out of the list just like social skills but - actually, yes I think I would like to take this course because I'm not too sure about money.'

3.1.3 Having a choice about what to do on the AA was part of its appeal

All the young people in the study felt that having an element of choice about what they did on the AA was essential. For many, part of their very reasoning for signing up to the AA was that they felt they would not feel 'forced' into participating in certain activities.

> *'It was that [a college course] or the Activity Agreement and the Activity Agreement seemed - it suited me better so I decided to go along with that …. The course was … I think it was based on Art or something, but on the Activity Agreement I could choose between anything and that seemed better.'*
>
> Kerry, Area 3

> *'I don't think I would have signed up on the AA if they'd just said, "It consists of Maths, English, Science, Construction work and First Aid - if you take the AA you will take these things".'*
>
> Robin, Area 2

Young people recognised that choice was an important aspect of being treated like an adult:

> *'I don't think you should be made to have to do something, especially if you don't want to do it. It's not like you're in school or anything.'*
>
> Harry, Area 2

Advisers themselves felt that it was important for young people to have some 'ownership' over their choices and to make an informed choice[1]. They employed various 'tactics' to encourage this, including:

- Giving young people information about a particular activity or course but then allowing them to decide for themselves whether they did it or not.

[1] Evaluations of the Neighbourhood Support Fund (NSF) and the Positive Activities for Young People (PAYP) programme have both identified the importance of involving young people in decision-making in order for them to develop a sense of ownership, create more responsive programmes and develop trust and confidence in the Project Worker or Personal Adviser.

'Everything is left up to the young person. All I do is signpost and offer advice and options. I would say I'm fairly relaxed about it, maybe differing from some of the other PAs, but one of the things I always say to them is that, "I couldn't care less if you want to do it or not. It's your decision. As long as I make you aware of the consequences of your decision, then that's my job done. So if you want it, great, I'll support you 100%, if not well you're nearly 18 years of age now. You're not a kid any more".'

Adviser, Area 3

- Talking young people through the potential problems or pitfalls to test how committed they were to the activity they wanted.

'If you're just going through the positives you're not actually being honest with them - they've got this picture in their heads it's so great but they actually have to travel two hours to get there, then they get lost, then they're not going to return the next day. So it's trying to make them look at it from a different way.'

Adviser, Area 1

- Asking young people to research options themselves. This was particularly the case either among young people who were unsure of what they wanted to do, to try to encourage them to find out more about their options, or when young people wanted to do something that was not in the ordinary range of provision.

'We would work really hard to make sure they could do what they wanted to do. But that doesn't involve, it's not just about me going, "Darling, you just stay there, I'll go off and get hold of them". They were involved in every step.'

Adviser, Area 2

'I will always give it to them to do, so that they know how much it costs and how much they are wasting if they don't turn up, and I like them to be able to have the skills to find things out for themselves.'

Adviser, Area 3

Some Advisers spoke of striking a balance between offering young people choices and helping them to make decisions. Some young people - particularly those who were unfocused about their future work or learning - could almost have too much choice and needed a firmer steer about what activities they could do.

Karen (Area 3) had no clear focus when she started the AA and was considering various college courses or work-based training options. Her Adviser encouraged her to try out different personal development and training courses but she felt that she had had enough of trying things out and wanted to make a commitment. It was only when a different youth worker intervened that she made a firm decision about what she really wanted to do: training related to Hair or Beauty.

'She [Adviser] just wants me to try out different things but like I don't want to feel stupid because she'll say, "Do you want to try this?" and I'll feel stupid saying, "No I don't want to do that, I want to do that" but [other youth worker] just pushes you.'

In the Adviser interview it transpired that she had gone on a taster course for hairdressing and did not like it, but was now researching a beauty training option.

3.1.4 Do young people feel they have enough choice?

Most young people are happy with the choices available

The majority of young people felt that they did have enough choice on the AA, in terms of both whether or not to do certain activities, and the range of activities that was available. This applied across all three of the Connexions areas, including those where a more menu-based approach was taken to planning activities.

> *'It was different from being sat down, fill that in and send that in, it was like, "What do you want to do?", not "There's a job - phone for them, fill that in".'*
>
> John, Area 3

> *'I was expecting it to be more of a set thing, like they set you things which you do but it's completely your own choice and as long as you are doing something that is okay, I mean within the boundaries obviously.'*
>
> Tom, Area 2

Limited or no perceived choice equates to non-attendance or gradual disengagement

Some young people reflected that occasionally they had felt somewhat pressured into doing certain activities because they were available rather than because they wanted to do them. Others reported occasional examples of courses being booked without their full commitment. This often translated into non-attendance, even if this meant missing out on a weekly payment.

> Tom (Area 2) felt that he had experienced a couple of instances of provision being booked up without his agreement: *'They have arranged odd things that I haven't gone to because I haven't had the inclination to do it. These are things which they arrange which I have no say in so it isn't really an agreement. Once they arranged a whole day at [name of town] doing a First Aid course and I decided not to go.'*
>
> His Adviser reflected on the same course: *'We were just running those group sessions and he was offered the opportunity to join in the group and said, "Oh well, I guess so. I might as well - it will look good on my CV", and then decided on the day not to go along.'*
>
> Around the same time, Tom was undergoing some personal problems and his Adviser felt this had been a factor in his non-attendance. Over the course of his AA he had missed payments two or three times.

Occasionally young people reflected that they had not had a broad enough choice, and this was generally when they had suggested an activity they would like to do and been turned down without a full explanation from their Adviser. The Adviser themselves may have had a good reason for this but it was imperative that this was explained and understood by the young person otherwise it could lead to resentment and a feeling of not being listened to.

Where young people felt they had not had enough choice in Area 1 this was sometimes because of an unwillingness to travel out of their own local area, which meant that Advisers were limited in terms of what they could offer. It was difficult for young people to appreciate these constraints.

Suzanne (Area 1) was interested in doing a childcare course but also lacked self-confidence and did not have the requisite entry qualifications. She did not want to travel outside her local area because of fears about crime combined with her lack of confidence.

'She said that she doesn't think that going in and working for an hour earns £30 - I have to make the effort. I said to her if it was closer I would make the effort but I ain't going all the way up to [name of town] just to do a course and have to come home again. I didn't think that was fair.'

Most young people are confident enough to say no if they have to

Where the Adviser was suggesting activities rather than this being led by the young person, most of the young people were confident enough to tell their Adviser if they did not want to do something. Indeed, many felt that this was essential, because otherwise they might just not turn up for that activity. It was generally the more self-assured young people, or those who had the clearest focus about what they wanted to do, who felt most comfortable about saying 'no' to things their Adviser suggested.

> *'I can say if I don't want to do things. There's no point being pressured into something you don't really want to do, I would end up not doing it.'*
>
> Paul, Area 3

Other young people were not necessarily self-confident but they were self-aware and wanted to 'manage' the volume of their activities so they did not feel they were taking too much on. Here, being able to exercise choice over which activities to do, and how many, equated to a sense of control over the scale of their commitments on the AA compared with other issues that might be going on in their personal or family life.

Debbie (Area 1) was in Week 8 at the time of her interview. Eighteen later this year, she had not attended mainstream school since the age of 14 or 15 and had not achieved any qualifications. She was very clearly focused on using the AA to access accredited courses and work experience, with a view to finding work as a receptionist in an office.

'He [Adviser] has offered me to do a few activities like going on the music project and whatnot, but he knows that I don't want to do that. I feel it's my decision but sometimes I do feel like I don't want to say no but I have to because I know for a fact I'm not going to go do it.'

'I don't want to sound rude or anything but I'm not in it for the activities and stuff – I'm just in it for like getting my qualifications and [to] get out and working …. If you get everything chucked at you, well it's just about what you can take on – you know what you can take on and you don't like want too much. I know for a fact if I was to try to take on more than two things at once then there's no way I could do it.'

Her Adviser was keen for her to do some other more personal development activities alongside this, such as going to the gym or taking part in sports, but respected her decision to concentrate on getting a qualification for now because he didn't want her to take too much on as she had a disruptive home life.

But some did find saying 'no' difficult

It was generally young people who had very low confidence or self-esteem who were more reticent about declining activities, and a few even felt that they were being 'pushed' into agreeing to take part in some things. When this occurred the Adviser usually had a strong reason for trying to encourage the young person to do that activity, for example because it would help them to develop more self-confidence. The young person may even have been persuaded of the benefits of doing the activity, but other barriers such as extreme lack of self-confidence, fear of meeting new people or fear of travelling to new places proved too large a barrier to overcome.

> Caroline (Area 1) had not turned up or had backed out of doing activities a few times due to her lack of confidence in a group and fear of travelling outside the local area. She initially agreed to attend a first aid course, and her Adviser supported her by offering to meet her there and attend the first session. But she admitted she was very nervous about it and had stayed up drinking until 5am the night before, consequently being too hungover to attend. Her allowance was stopped for that week. Her Adviser then suggested she take part in a NHS workshop which was an introduction to NHS careers, but she missed that activity as well. Having her allowance stopped for the week was not a big disincentive for her, compared with her anxiety issues. She felt she had learned from this experience though, and the next time it was suggested she declined the offer as she felt she would still not turn up.
>
> *'Well I'm squeamish for a start so I didn't think I would like it. But I don't like saying no to people so I said yes and then backed out at the last minute. She left it for a couple of weeks and then asked me again but this time I'd learned from before and said no to it straight away.'*

Debbie's Adviser felt that some young people, in particular those who have had a lot of prior contact with Connexions or similar 'authorities', such as looked-after children, find it more difficult to make independent choices and say no to things than others:

> *'There are some young people - anything to do with any organisation, any profession - - they've trained themselves what to say, so it's just breaking that barrier. This is not about you just saying yes.'*
>
> Adviser, Area 1

3.2 Is the menu flexible enough?

3.2.1 Extent and range of provision

Evidence from both the young people and the Adviser interviews portrayed an extensive range of activities across all three of the case study areas. The activity maps below have been selected to be 'typical' examples of the types of activity undertaken by young people with a work focus, a learning focus, or no clear focus, from across all three of the Connexions areas.

Work-focused young people

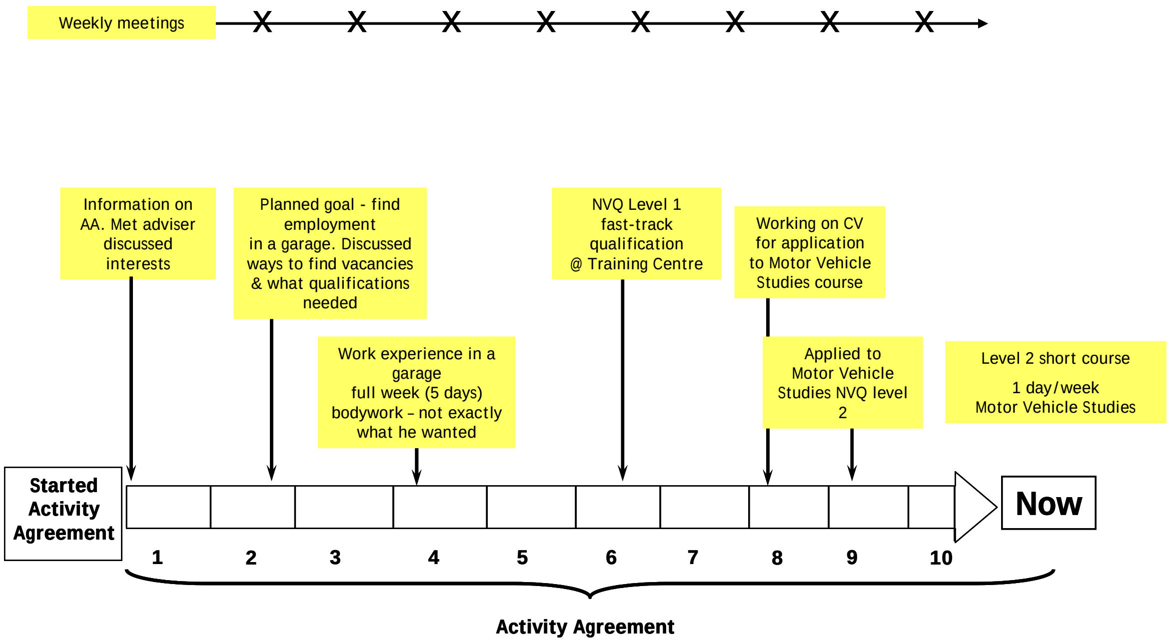
The priority of work-focused young people was to get a job or an Apprenticeship. However, some of them knew that in order to improve their chances of doing this they would need to improve their key skills or build up relevant work-related qualifications. If they did not recognise this at the start of the AA their Adviser would use strategies to help them understand what was required for certain jobs.

Paul already had relatively good qualifications, with 9 GCSEs (including 2 C grades) and a GNVQ in IT (with four B grades). He considered college on leaving school but decided he wanted to work instead. He originally went to Connexions for help to find a job working with motor vehicles and remained work-focused, although his focus had developed somewhat as he had done several work-related qualifications with a view to gaining an Apprenticeship as a mechanic. At the time of the interview he was waiting to find out if his application for a Motor Vehicle Apprenticeship had been successful. His Adviser later confirmed that it had been, and he was now applying for placements with garages:

> *'Hopefully with the qualifications that he's got anyway he will be a good asset for any sort of garage really for his age, because he's going to have good skills behind him.'*
>
> Adviser, Area 3

Activity Map - Paul, Area 3

Paul left school at 16 with relatively good qualifications. He had considered college at 16 but wanted to look for a job instead to get money. Prior to joining the AA he had worked in a shop but this job had not lasted. His decision to join the AA was motivated by the incentive payment.



IES, 2008

Learning-focused young people

Young people who were learning-focused generally wanted to go to college to do vocational qualifications in areas such as childcare. Some of them wanted to find a job rather than go to college, but realised they needed to improve their qualifications first. Many of these wanted to improve their literacy and numeracy.

Emma left school at 15 with no qualifications. She went to Connexions for help to find a job and gain some qualifications in Maths and English to help boost her chances of getting work. She was very clear about her reasons for taking part in the AA and for the time being did not want to take part in any of the personal development based, more 'fun' activities on offer:

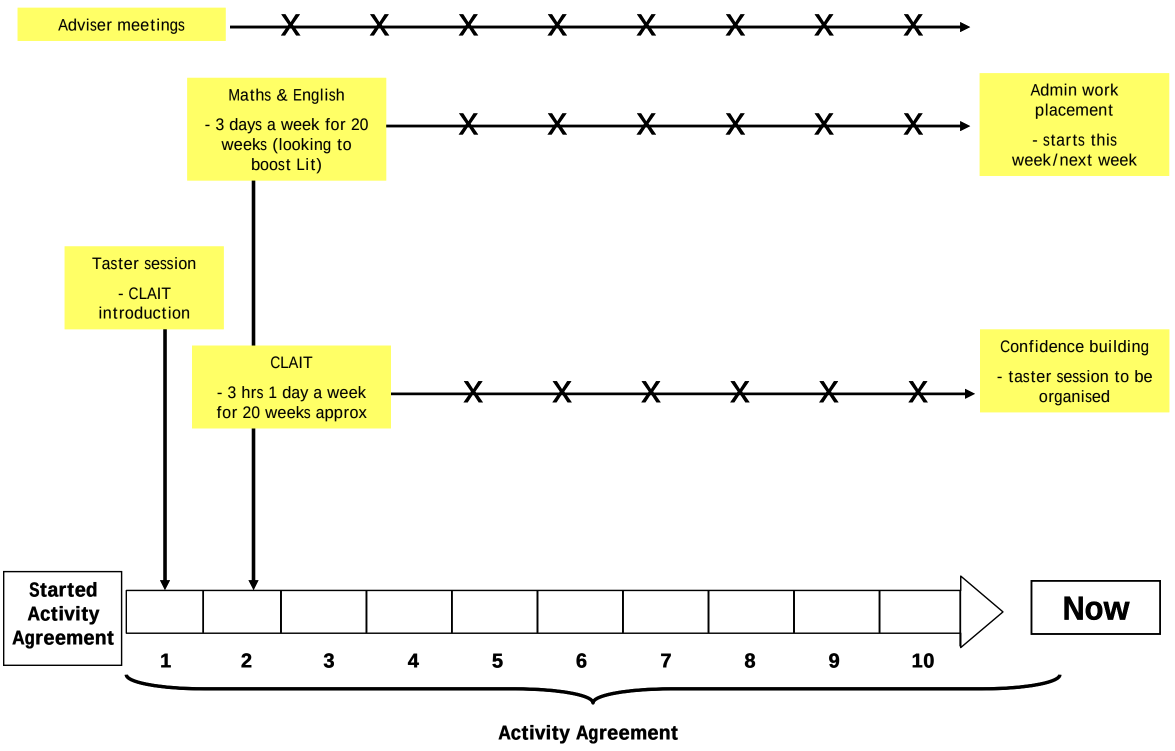
'She [Adviser] said, "Would you be interested?" I said, "Not really. I just want to get my ICT and I need to do my Maths and English again." She said, "That's fine." She was trying to make me do something fun as well but I didn't fancy it.'

Emma, Area 2

At the time of the interview she was waiting to start a group work placement in administration, which her Adviser had suggested. According to her Adviser, her attendance at some of the activities was problematic as she needed to build more of a routine.

Activity Map - Emma, Area 2

Emma left school at 15 with no qualifications and few ideas about her future. She was in contact with Connexions prior to joining the AA since she realised she needed to find a way to gain qualifications. She saw the AA as a second chance and was highly focused on certified courses (rather than personal development activities). As a result of being involved in the AA she made a decision that she would like to work in administration and was seeking a work placement as the next stage of the AA.



IES, 2008

Young people lacking clear focus

Many young people who were unsure of what to do needed to try out different pathways before they found something they enjoyed or could develop a firmer goal. In the following example, Robin started the AA for help to get a job, under some pressure from his family. He was vaguely interested in work related to the environment or computers, however he lacked any work experience and had limited qualifications. He also lacked confidence, especially in group situations. His activity map shows the range of activities he had done, which combined improving his literacy and numeracy with gaining IT qualifications and some personal development activity. He had been disappointed to an extent that he could not progress to higher level courses, but felt it was still beneficial to obtain some basic qualifications. He had particularly enjoyed the environmental volunteering, which he mentioned had not been on the original 'list' he had been shown:

'It wasn't on the list originally but I mentioned that I was interested in the environment and they had a look around for things I could do and that was amongst them. I was a bit surprised actually - because organisations tend to get set in their ways a bit - I was surprised that they were able to find a course for me even though it wasn't on the list.'

Robin, Area 2

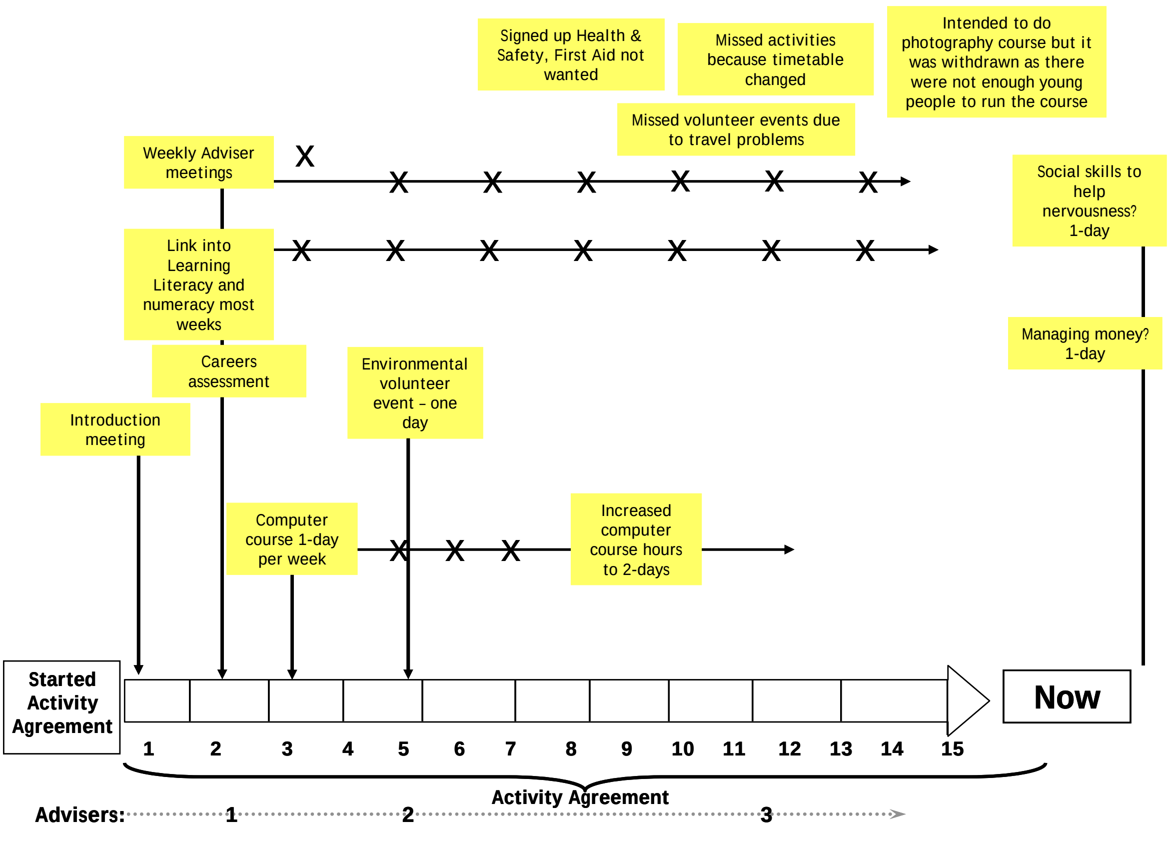
By the time of his Adviser interview, there had been a shift in his focus and he was now applying to do a national diploma course:

'He went from saying oh no, he couldn't possibly go to college, his dad needed him to get a job and me saying, "Well no, you're not going to find a job I'm afraid. Look at this course", to him taking the course home and going through it with his dad and coming back and saying that him and his dad agreed it was a golden opportunity. It was just magic, the perfect course for him.'

Adviser, Area 2

Activity Map - Robin, Area 2

Robin was home-schooled and entered as an external candidate for examinations at a local secondary school. He gained some qualifications however did not achieve either English or Mathematics. He was keen to rectify this as part of his AA.



IES, 2008

Taster approaches worked well

Across all the different starting points described above, taster-style provision, or a 'taster' approach to more standard provision, had an integral role to play for some young people, particularly if they did not have a clear focus or if they had specific barriers to achieving their goal. Tasters or a taster-style approach to activities allowed young people to try something out without being committed to attending it on a longer-term basis:

> *'It's good to let them see for themselves with no pressure. It has to be something they want to do themselves, and be totally from them.'* Adviser, Area 3

> John (Area 3) joined the AA for a combination of the weekly allowance and help to get a job. He mentioned to his Adviser that he had problems with literacy and this was an obstacle to him completing application forms. His Adviser suggested that he attend a 'Job Club' which was held regularly every week for AA participants. This would provide help with putting together a CV, completing application forms and job-readiness such as interview role plays. The option was presented to him as something he could try out first rather than as something he should commit to attending every week from the start, which helped him to be more confident about doing it.
>
> *'They told us so I just thought I may as well try it. I only wanted to go the once, so it was like if I didn't like it I wasn't going to go again.'*
>
> He felt that he benefited from this activity because it improved his job-searching skills and confidence but also provided one-to-one support to help him improve his writing.

3.2.2 Do Advisers feel they have enough options?

Particular examples of where bespoke or tailored provision had been brokered are discussed in Sections 4 and 5. On the whole, Advisers felt they had sufficient options across a broad spectrum of activities on the AA, in all three case study areas.

However, Advisers did have to deal with constraints in terms of the types, settings, or locations that young people would or could consider[1]. Such constraints clustered around the following issues:

- **Unwillingness to travel beyond the local area.** Ironically, this was a particular issue in Area 1 where public transport links were most developed. The main constraint was young people's fear of crime:

  > *'She [Adviser] said she's going to look for local ones but she said that the problem with me is because I won't go out of [area] she said it's going to be very hard to help me …. It's too dangerous now to go outside [area] and come back - it's too dangerous, especially if it's at night.'*
  >
  > Suzanne, Area 1

  This issue could sometimes be exacerbated by family or cultural attitudes. Advisers tried to deal with this by offering a range of support mechanisms, such as breaking down journeys into smaller steps, offering to accompany the young person to a course or arranging for a 'buddy' to attend with them. If the issue was about gang violence and no-go areas, Advisers said *'We don't negotiate'*.

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[1] Note: constraints mentioned here are different from those discussed in Chapter 5, which focus more on the constraints to brokering new or bespoke provision rather than constraints on what activities young people will consider on their 'menu'.

- **Difficulties travelling due to cost/ accessibility of public transport.** This was a particular constraint in Area 2, due to the size and rural nature of the area. Advisers tried to ensure that young people did not have to travel more than an hour each way to any activity, although there were a few cases where the young person was travelling further than this. Taxi pick-ups were arranged to take young people to and from their activities where they had to travel a long distance or where there was no suitable public transport. Some Advisers felt that geography was a constraint on what they could offer:

  'I feel that what we have to offer in this area is limited partly due to geography, because of not wanting young people to have to travel more than an hour to a provider, and finding good quality provision in this area is not easy.'

  Adviser, Area 2

  The cost of travel was also an issue. Some Advisers felt that the changes introduced from April 2008 would eat into the budget available for activities for each young person:

  '[The new delivery models allow] £40 per week per young person including their travel costs. Take Harry, his travel is £6.50 a day. So if he comes in for two days a week that's £13 out of his £40 and the cheapest provision that we can book, or that we've got on our books, is £45 an hour'.

  Adviser, Area 2

- **Lack of confidence in a group.** This was a consistent issue across all three of the areas, but particularly so among the young people we interviewed in Area 1. Many young people were confident in their own environment - 'on the street' as one Area 1 Adviser put it - but were extremely under-confident when faced with unfamiliar situations or faces. Some young people had experienced bullying in school and had quite a severe barrier to mixing in groups of other young people. This meant that the 'menu' was limited for such young people because there were time and cost constraints to what could be offered on an individualised basis.

- **Health problems.** Some of the young people had mental health problems such as depression, which could interrupt their attendance or make them reluctant to try new things. For example, one young man who had been out of a routine for a long time (and who did not attend school from the age of 12) had disruptive sleep patterns which affected his attendance at activities, even though he was committed to going. In this case his Adviser had referred him to specialist medical support.

- **Pre-conceptions about 'training' or 'college'** based on negative prior experiences or stigma. Many of the young people wanted to work rather than to attend college or training and had negative preconceptions about what training would involve. This was particularly the case among young people who had been NEET for some time and may have already undertaken various training courses. Tasters could be a useful addition to the 'menu of choice' here as they allowed young people's stereotypes to be addressed:

  'A lot of them [say], "I'm not doing training, I just want to get a job" without realising that they're probably going to have to do a little bit of training to get the job they want anyway. It works really well for the lads who (I think it's more of a macho thing) [say], "I'm not doing training" - then on the other side you have got the people who lack confidence who just want to go and have a little taste first and say "Is it really that bad?".'

  Adviser, Area 3

3.2.3 Provision gaps

As well as constraints on what some young people would consider or were able to do, Advisers also mentioned some specific gaps or shortages in terms of the range of provision that was available to them in their area and which limited the 'menu of choice' in practical terms. In some cases this was a gap which existed across the Connexions area as a whole, while in others the issue was more localised:

- **Work experience placements.** This was mentioned as a gap across all the three areas. One Adviser in Area 1 reported how difficult it was to set these up, in particular where a young person had the possibility of an Apprenticeship training place but was required to fix up their own work placement to go with it. Area 3 had a dedicated member of staff to source work placements but there were still felt to be gaps in particular sectors such as Motor Vehicles, where employers might have health and safety considerations with taking on a young person. It was also very time-intensive to source work placements for more unusual interests such as working in a library, or to find placements for childcare or health and social care where a CRB check was required (which could take up to 12 weeks).

  'I'm having difficulty finding a provider that can offer work experience in the commercial sector and in the not for profit sector, and I think that's something that an awful lot of our young people would benefit from - either a regular placement in the sector of choice or just trying out places in various organisations. It's very frustrating.'
  Adviser, Area 2

- **Work-based training options** (for example NVQ training). This was particularly mentioned in Area 2:

  'I think a lot of these young people do have a focus and are actively looking for work and just haven't been able to find it, so for them [they need] something that really builds around that vocational choice, makes them more employable.'
  Adviser, Area 2

- **Provision beyond Level 1**. Some Advisers in Area 1 mentioned a shortage of provision beyond Level 1. This could lead to boredom among young people who had 'churned' though several other programmes:

  'Lower level - Level 1 - [makes] no provisions for progression into Level 2, everything is just at that level, so even though there's lots to do and certain young people have done 12 different Level 1 things … basically they're the same thing …. That's when it does become, "Oh I've been to this already, this is boring" - it's not boring because they can't do it, it's boring because they've done it or they've done something similar.'
  Adviser, Area 1

- **Young people's counselling services**. This was identified as a localised issue in parts of Area 1. Advisers reported that while counselling was available in some local authorities, it was not in others. Where not available locally, it presented a difficulty since some young people's needs centred on a fear of travelling outside their local area.

3.2.4 Critical cases: what happens when ….

Young people's plans are unrealistic or difficult to attain

Advisers generally took a pragmatic approach when confronted with young people whose plans were unrealistic compared with their current situation. One of the most common tactics used in this situation was to ask the young person to start researching or putting evidence together towards that particular goal, with the aim of letting them find out more about it and developing a clearer idea of what they needed to do to achieve it - and how realistic this was. Another tactic employed by Advisers in this situation was setting up a 'Plan B'. Many spoke of this being a 'safety net' in case the first option did not come off.

Nathan (Area 3) wanted to become a ski instructor. He was a reasonably accomplished skier and had a grade A* in GCSE French, so this was not a wholly unrealistic aim. He lived quite near to a local ski centre where a course was available.

Throughout his time on the AA his Adviser was helping him to work towards this goal but also building up fall-back options for him as a ‘safety net’. This started with asking him to consider working in a ski shop, and was then expanded to working in retail more broadly (so that he would have enough money to support himself while he continued with his skiing), then to the possibility of a Level 2 or Level 3 college course in Travel and Tourism.

‘I said to him, “You haven’t lost anything because you could leave college and go if you get a job abroad. But if you don’t you’re working towards qualifications that will give you a much better chance second time around.” …. So I mean he agreed to consider college …. It’s sort of been like drip, drip, drip all the way through.’

Provision is unavailable or delayed

In cases where the target ‘core’ provision was delayed, it was common for young people to be offered alternative provision while they waited for this to start. However, it was imperative that this had an aim in itself and was not just being used to pass the time until the other provision could start, otherwise young people could become bored and disengage.

Lindsay (Area 3) was interested in childcare and had the possibility of a work placement lined up, but it was taking some time for her CRB check to come through. By the time of the interview she had been waiting for this for almost 3 months. Her Adviser used this as an example of where having a ‘menu’ of provision was ideal because it gave the young person other options while she was waiting for the CRB check.

‘For what she’s interested in she needs to be CRB cleared so it kind of put a block on doing anything with that really until she gets it through …. Had she not wanted to do, Maths and confidence and things like that I suppose it would have been an issue … it might be something where she felt “I’m not really getting what I want from this”.’

Provision is not sufficiently tailored

There were a small number of examples of young people starting provision which was either not sufficiently tailored to their needs or which was just at the wrong time for them, in terms of their own level of engagement with the AA. In almost all these cases, the young person dropped out of the activity (although not the AA as a whole).

3.3 How do activities ‘fit together’?

3.3.1 The relationship between activities

Young people’s activity maps appeared to fall into four broad categories:

- Those which built up an **incremental pathway** towards an agreed work or learning outcome. These were generally young people who had a work or learning focus at the start of their AA (although they might not necessarily have a very specific objective within that aim, at the start). An example of this type of map is shown in Section 3.2.1 (case Paul).

- Those which were more **'scattergun'** in their approach, with the young person trying out lots of different activities in order to form a clearer idea of what they wanted to do. This was most common among those who had no clear focus at the start of their AA (see, for example case Robin in Section 3.2.1). Often these maps began to crystallise into a more coherent set of activities, from around 10-12 weeks onwards, as a clearer work or learning goal emerged, but sometimes they did not.

- Those which **started off with a burst** of activities (usually related to a specific course or job search activity) and then appeared to **'tail off'** into few activities bar Adviser meetings and job search activities such as looking at vacancies and sending off CVs. This was more common among those who were set on finding a job. Some Advisers mentioned it could be difficult to keep some of these young people engaged if they would not consider doing any other types of activity.

- And finally, those maps which took **several weeks to get started** on activities other than the regular Adviser meetings. Often these maps belonged to young people who had severe problems with self-confidence and self-esteem, about whom Advisers were concerned in terms of their general level of engagement with the AA itself, and/or who faced multiple barriers to progression.

Given the qualitative nature of this study it is not possible to quantitatively assess the different proportions of young people taking these pathways through the AA. Another factor to bear in mind is that those young people who agreed to participate in the study had, by definition, persisted with the AA at the time that we interviewed them (although some may have subsequently dropped out or been suspended); and were also sufficiently engaged with it to agree to take part in the research in the first place. This means that the study is likely to have picked up more cases of the former two types of pathway, and fewer of the latter, than among the general population of AA participants.

3.4 Conclusions

The 'menu of choice' theory states that 'If the policy provides a 'menu of choice' to the young person then there is a greater likelihood of being able to provide them with activities they need and want in order to progress'. The assumptions which underlie this theory are as follows:

The 'menu of choice' is varied enough to appeal to young people with different interests and aspirations

This part of the theory appeared to hold true across all of the three Connexions areas, despite the difference in approaches they used to setting out the 'menu' to young people. There were few examples where young people had not been able to do something which they really wanted to do; and many examples where young people had been able to take part in a wide and varied range of activities, in particular those who did not have a clear idea about their future goals, who could try out various different areas of work or learning through taster-style provision.

Some provision gaps were identified. The most consistent gap across all the three areas was work experience placements. This was a particular issue for work-focused young people (in particular if they wanted to do some work-based training).

It has the capacity to be tailored to what the young person wants to do and when they want to do it

This element also held true generally but was less universal and more interdependent on the other provision theories explored in Sections 4 and 5. Use of the Discretionary Fund and brokerage from the Advisers were crucial components of whether the menu could be tailored and could provide timely provision.

Constraints on the 'menu of choice' may have a negative effect and may lead to disengagement from the young person unless they can be overcome OR negotiated around to achieve an agreed alternative

Again this element of the theory was evidenced in the research which found that some young people had missed activities which they felt they had not particularly wanted, or where they had felt uncomfortable about saying no. A key aspect of the Adviser's broker role was about negotiating constraints (see Section 5 for more detail). However, some constraints or barriers were difficult to overcome purely via more flexible provision because they were associated with issues centred within the young person, such as severe lack of confidence in group situations or health barriers. In these cases referrals to specialist support services was needed. Some Advisers felt that the 20-week AA period was not long enough to achieve outcomes with young people in these situations, especially if the main problem did not become apparent until several weeks into the AA.

The fit between activities is important to ensure there is some form of development between them

It was important to build progression into the AA and to ensure that young people recognised the benefits of each activity they had done (explored in more detail in Section 5). Activities did not necessarily have to be incremental - there was a role for trying things out and changing track if the young person found they did not want to pursue a particular course of action. Having a broad enough 'menu of choice' to provide the flexibility for young people to do this was crucial, so that they did not feel 'boxed in' to a particular pathway. In turn, it was important that Advisers had the flexibility to 'fine-tune' activity programmes for individual young people (discussed in more detail in Section 5), and one way of doing this was by building in fall-backs and safety nets to ensure that the young person could progress in different ways.

4 The ‘Adviser Discretionary Fund’ Theory

This chapter explores the role and use of the Discretionary Fund (DF) within the Activity Agreement (AA). It covers the use of the DF to provide bespoke courses or activities for young people, other uses for the DF such as the purchase of necessary equipment, young people’s understanding and perceptions of the DF, and the importance of regular Adviser meetings to identify barriers that can be overcome with the support of the DF.

Theory 15 (the ‘discretionary fund’ theory): By giving Connexions staff access to a discretionary fund for each young person, they will be able to use it to lift specific or immediate barriers preventing the young person from progressing.

4.1 What is the discretionary fund?

According to the AA Pilot Guidance issued by DCSF in November 2005, the Discretionary Fund is intended to complement existing funding streams and fill gaps in provision and services. In the first two years of the pilot, it equated to approximately £500 per individual. The expectation is that the needs of the most disadvantaged young people will be prioritised. Also, within the framework of activities, basic skills will be prioritised to support progression. In addition to commissioning bespoke learning and training provision, the Discretionary Fund can be used to help young people buy goods or services that will move them closer to learning or work and help them to overcome the final barriers to engagement. This might include:

- travel passes
- work clothes or a new suit for job interviews, or
- books, tools and equipment.

Young people do not receive the money directly. When a need for funding is identified the Adviser makes the purchase on the young person’s behalf, or accompanies them when the money is being spent.

4.2 Using the DF to pay for bespoke provision

The DF was used for some young people to acquire specific courses or activities that related to their career goals and aspirations. It should be highlighted here that ‘bespoke’ in this case refers to a course or activity that has been bought in just for one individual young person. An example might be buying a correspondence course for one young person who consistently missed appointments at other courses because of her fear of being in a group of people she did not know. This differs from what could be described as ‘tailored’ provision. Tailored provision is courses or activities that have been adapted or designed from scratch, specifically to meet the needs of young people who are on the AA. One example is a confidence-building programme that was specially commissioned using monies from the DF, jointly designed by a partnership of AA Advisers and the trainer, which ran periodically for small groups of young people who needed it.

4.2.1 Going beyond the ‘menu of choice’

Interviews with Advisers revealed that initially they used the menu of activities as a starting point to gauge the young person’s interests. During the initial meetings they highlighted to the young person that they could organise other courses or training that may not be in the ‘core’ list.

> *‘Nothing is not available on the AA! … everything is there - everything is there - it’s just a case of doing your research - trying to find something but there’s lots of things - there’s not one thing which has come across to me and I said, “Oh sorry I can’t”.’*
>
> Adviser, Area 1

Based on the sample only a few individually bespoke courses were organised as the menu seemed to have enough variation in activities in all three Connexions areas to develop the young person’s skills and appeal to their interests. Despite this the DF was seen by all Advisers as an integral part of the AA as it provided flexibility.

Very few bespoke courses were organised for work-focused young people as the aims that they had for the AA were to improve their general employability skills, and most of this provision was already available on the general ‘menu’. Where they occurred, bespoke courses were organised for young people with very specific, ‘niche’ career aims.

When Nathan (Area 3) joined the AA he wanted to become a ski instructor and his adviser felt this aim was realistic given his pre-existing skills and qualifications. The Adviser set him an initial activity of researching the qualifications and skills he would need to help him towards this career goal and then the courses that he could do to get these.

The Adviser felt this was an important process to go through as it highlighted all the steps he would need to complete to become a ski instructor. It also allowed him to prove to the Adviser that he had sufficient interest in this career to justify spending the DF on a ski instructor short course.

Bespoke courses for learning-focused young people were often a way of providing short taster courses in more unusual subjects, or including a range of provision within a sector such as construction, so the young person could decide if this was something that they wanted to do, and which element of it they would like to specialise in. They could also be used where there was a barrier to attending more mainstream provision, such as lack of confidence to attend a group-based course.

Examples of bespoke learning-related provision included Steve (Area 3) taking a taster in all elements of construction such as painting and decorating and carpentry.This was provided as he had expressed interest in working in the industry but did not know exactly in what area he would like to specialise.

Caroline (Area 1) was interested in working with children. The Adviser was investigating whether she could use the DF to buy in a national extension college course in childcare. There were other, free childcare courses available locally, but Caroline had extremely low self-confidence and had missed several other appointments where group-based provision was involved. The national extension college course could be done from home.

There were some discrepancies by area in the types of provision that were organised for learning-focused individuals. A young person in Area 3 wanted to explore creative writing and this was granted and paid for using the DF. However a young person in Area 1 was not granted the DF to do a similar course. It is likely that this decision would have been affected by other factors, such as the young person's motivation, and the availability and cost of appropriate provision.

Bespoke courses or activities for young people with no clear focus included games design courses, animation courses, and Spanish lessons. However, at the point of the interviews these courses were still being explored by the young person, and the Adviser had yet to agree to fund them. This may be a reflection of the Advisers' policy to only organise bespoke provision for young people who prove their interest in courses and activities before the DF money is spent. Generally this was the group that had the least bespoke provision organised as they tended to have no clear idea of what they wanted to do in the future and were happy to participate in the activities that were available on the menu to help them firm up their plans.

In many cases, the DF was not used to buy in extra provision. This is not a reflection on the usefulness of the DF but reflects how comprehensive the menu was in each area: most young people did not require bespoke or tailored provision because what they wanted or needed was already available. Despite this, the DF was still viewed as an essential element of the programme.

4.2.2 Using the DF as a motivational tool

Almost all Advisers wanted the young person to do some research on any courses that they wanted to do that were not available on the menu. This was a tool that the Advisers used to gauge their interest and commitment. Advisers also commented on the fact that they did not want the young people to get everything they wanted right at the start of the programme. They had to demonstrate that they were sufficiently engaged in the AA.

> *'Well, to be honest with you, I tend not to spend a lot of Discretionary Fund money in the very early stages. Because sometimes I think there is a pressure to jump in to buy into a course and to have them engaged on a course every week, doing something for a period of time, and I'll be honest with you, until I know them well enough to have assessed with them - where they are at and [if] they are ready to do it …. [I can't know] that [it] is in fact the right thing for them.'*
>
> Adviser, Area 3

This approach was particularly pertinent for this Adviser as they had organised a forklift truck course for one individual in the first few weeks of their AA. The young person had failed to turn up to the provision and the DF money was wasted. So now the Adviser took a cautious approach and young people had to prove not only their interest in the course but how engaged they were with the AA generally.

4.2.3 Managing the DF

Advisers commented that having the DF added flexibility to the programme and allowed them to organise provision that could benefit a young person and their specific goals. However others commented that they could not spend too much on courses as this would leave the DF short for other things that the young person may need over the course of the AA.

'There is a bursary attached to the programme but the bursary's not huge amounts of money, so if she wanted to do a short course and the short course was £500 I would have to think about that …. If we spent £500 on one course then she wouldn't have any money left for her long term goals, so it's about deciding.'

Adviser, Area 1

One Adviser commented that the use of the DF for bespoke courses was often limited by the options that she could offer the young person, as she could only suggest things that they may like to do based on her own knowledge. Unless a young person came in with a specific idea she could not necessarily suggest new ideas to them. This may have been another factor in how little the DF was used to pay for individually bespoke provision.

There were few instances among those interviewed for this research in Area 2 where the DF had been used to buy bespoke provision. Advisers in this area tended to organise and tailor new provision so that it was purchased centrally and open to more than one young person. The higher costs of travel in this area were a factor in this decision.

4.3 Using the DF to remove immediate practical barriers

The DF was used to remove other, practical barriers that may be affecting young people. Some of the most common uses for all groups were gym memberships and provisional driving licences, or the costs related to completing their driving theory test. This was common across all groups of young people, whatever their initial focus.

4.3.1 Travel costs were the most common usage for the DF

The most common use of the DF, overall, was helping to pay for travel costs, although these costs varied from area to area. Area 1 often used the DF to buy travel passes which incurred a relatively small travel cost. The costs in Area 3 varied immensely, with the young people based in more urban areas incurring small travel costs in bus and train fares, whereas the young people in more suburban areas had extremely high taxi costs. There was some discussion about getting the providers who were benefiting from the young person, such as through voluntary work, to help pay for travel costs.

By far the most money spent on travel was in Area 2. The young people, in most cases, lived in extremely rural locations, and taxis to and from activities would often be well over half of the daily £40 allowance taken from the DF.

The DF for work-focused young people was often used to remove immediate practical barriers that were preventing the young person moving into work. These included clothes for interviews, and a mobile phone and credit for one young person so he could ring up companies for jobs and be reached by employers. Other uses of the DF related to equipment that young people needed to start jobs or work placements, such as overalls and work boots for a gardening placement, or CRB checks to enable young people to work with children.

The uses of the DF for learning-focused young people were similar and focused on removing practical barriers that enabled them to continue with their learning. Examples in this group include paying for the kit needed for one young person to enrol on a hair and beauty course, and buying work boots and overalls for a young person about to start on a motor vehicle training placement.

The DF was used very little for young people with no clear focus as this group did not have a definite idea about what they wanted to do, and therefore barriers that the DF could help with had yet to be identified. One of the few examples was a pregnant young woman being bought equipment to facilitate her participation in a healthy lifestyle activity, which had the additional benefit of enabling her to meet other pregnant women as she was becoming increasingly isolated at home.

4.3.2 Views on the impact of the DF

Generally, Advisers felt that the DF was extremely useful for removing immediate barriers and allowed young people to take part in activities or courses from which they would have otherwise been excluded.

> *'The discretionary money improves the lives of kids so much, to be able to access that. Whereas, if you try to access funding for something like forklift you would probably have to wait until he went on to a job.'*
>
> Adviser, Area 3

> *'I love the DF - it's great! We can pay for stuff they need - the only things we can't do is pay for driving lessons or a laptop - but generally most other things are ok. It really opens doors and opportunities for people. For example, I have bought someone who wanted to do Hair and Beauty at college a £200 beauty kit and a uniform that cost £100. Now, £300 for one of these young people to equip themselves to do a course is a huge amount of money.'*
>
> Adviser, Area 1

Reports from the Advisers tended to be extremely positive and they felt that DF added a lot to the AA. Having the means to be able to remove the young person's immediate practical barriers to work or learning meant that the young people were able to accept opportunities that otherwise would have been unavailable to them due to financial barriers.

Areas 1 and 3 utilised the DF to remove practical barriers for young people, particularly for courses or work clothes and with some travel expenses. Area 2 utilised the DF as a daily rate – the DF allowed £40 per week per young person. In some cases over half of this would be used to pay for travel costs so that left little money to spend on other activities or equipment.

Advisers felt the DF could be more flexible

One Adviser commented that the ceiling amount for each young person should have some flexibility, particularly as some young people don't spend any of the DF and others need a lot more financial support. The DF not spent on some young people could be used to contribute to young people who may have needed more financial support. It should be noted here that while local guidelines may exist, central policy did not set a ceiling level for DF spending per individual.

Advisers commented that not being able to use the DF for driving lessons was a loss to the provision. In their view, these would be bought only for young people where driving was an essential qualification to get a job.

'A big gap - driving lessons. Whichever department we come under think that it's a reward, but for me it's not a reward it's a necessary skill for the young people. A lot of jobs, a driving licence is required and a lot of the young men want to work in construction. A lot of construction [employers] say you need to have your own van and those kind of things, you know what I mean, so that's a big gap. It's not a reward, I mean it depends how you work with the young person. It's not every young person, you sign them up, "Yeah, come on and we'll get driving lessons". No, it's how you work with them.'

Adviser, Area 1

4.4 Young people's recognition of the DF

There were some examples of young people who had a very clear understanding of the DF, what it could be spent on and how much the limit was. Understanding of the DF did not appear to vary depending on the focus of the young person.

'He helped me find a gym because I have got stiff bones, so he did help me with my health a lot …. Do you know they give us £500 if we need to make our own bus passes or whatever I need basically, to take out of that money? So that money will go into the gym instead of me paying it.'

Adya, Area 1

Others were aware that the DF was available and that Connexions could pay for things that they may need, without knowing all the details. Some commented they knew that they could get work clothes or a tool kit if they needed one.

'I didn't need nothing, no. The only thing like that I needed, if I do get an Apprenticeship, then I need boots and a jacket and a box of tools, like she'll get for me. She's very very helpful.'

Benjamin, Area 1

The young people also had a good understanding that the DF had limits to it. One young person had commented that he wanted to have motorbike lessons but understood that Connexions wouldn't be able to pay for those.

Across the board the young people appreciated this financial help and there was no evidence of young people trying to take advantage of the money. It helped reinforce their positive impressions of Connexions and the amount of help they can offer to help them move on. There were no regional differences in the way that Advisers explained the DF to the young people. The detail and description of the possible uses of the DF depended on the young person and their specific circumstances. Across all three areas there was an implicit understanding by the young people that Connexions could help them out financially if they needed it, without the young person necessarily knowing the details of the DF.

4.5 Identifying barriers through regular Adviser meetings

Regular meetings with Advisers were useful for identifying practical barriers such as travel costs and clothes. However, young people and Advisers felt that the meetings were not crucial for identifying these barriers as there did not need to be a personal relationship formed or a level of trust established to ask for these more practical items. Meetings with Advisers centred on different issues such as personal development, support needs and progression within the AA more generally.

There was one example where regular Adviser meetings had identified a barrier and the DF was used to overcome it. This is described in detail in the case study below.

Adya (Area 1) was having problems engaging with the AA. The Adviser was worried that she would leave the programme so he called her in to have a meeting after she had not participated in two agreed activities. During this meeting she confided in him that she had health problems. A doctor had told her she could reduce these health problems by taking part in regular exercise, an activity she had shied away from previously.

The Adviser explored with the young person why she didn't want to take part in a physical activity if it would improve her health. As a Muslim female, she was concerned about going to a gym during mixed-sex sessions and felt that she would be extremely uncomfortable in this environment.

The Adviser asked her to go and research gyms that offered women-only sessions that he could pay for with the DF, even though gym provision was available through another local provider. She did some research and found a gym which offered swimming sessions to young Islamic women, and the Adviser was able to fund this provision.

After the development of this activity the young person had become more engaged with the AA and was confident she could go to her Adviser with any other problems that she may have.

4.6 Conclusions

This theory states that 'by giving Connexions staff access to a discretionary fund for each young person, they will be able to use it to lift specific or immediate barriers preventing the young person from progressing'.

The DF was seen as an extremely useful tool by both young people and the Advisers. Advisers appreciated the flexibility it gave to the programme, and felt it allowed them to be more person-focused when exploring possible courses or equipment the young person needed. Young people in turn appreciated that they could get help with work or course-related equipment they may need. The young people understood that the money had limitations. Overall young people had a sound, if not detailed, understanding of the DF.

The DF was rarely used to buy in a bespoke course, ie new provision just for one individual young person. This was a reflection on how comprehensive the 'menu of choice' was in all three regions. However, despite this, Advisers in all the areas felt that it was an important part of the programme as it allowed young people with very specific or unusual career goals to benefit from the AA.

Some Advisers felt that there could be more flexibility in the ceiling of the DF as some young people did not need any money spent either on bespoke courses or equipment. Their 'budget' could be offset for equipment or provision for young people who needed more financial support[1].

Spending the DF was not taken lightly by either young people or Advisers. Advisers expected the young people to prove that they deserved the money spent on them and young people were aware that there were limitations to what could be spent on them through the DF. There were little regional difference between the two urban areas in their approach to using the DF for bespoke provision and equipment. Area 2 spent less on these items due to the increased costs of travel in a rural area. They worked extremely hard to make up for the lack of funds by organising many tailored courses or opening out provision explored for one individual to a wider range of young people.

Overall the results of the study indicated that the DF helped to remove specific or immediate barriers for the young people so they could progress, as well as being employed as a motivational tool by Advisers. The DF could also be used to develop the existing menu of activities (via paying for the design of tailored provision which could be added to the general menu), or by allowing Advisers to pay for bespoke provision to fill a gap for particular young people with unusual learning or career aims. In this way it helped to broaden the 'menu of choice' available to young people, and assisted the brokerage role by drawing young people into decisions about how the DF might be used.

1 While local guidelines may exist, central policy envisages some flexibility in the use of the DF.

5 The ‘Broker’ Theory

This section explores the ‘broker’ theory:

> **Theory 16 (the ‘broker’ theory):** For an agreement to work, the broker must access provision that meets young people’s needs, and to do this effectively they need to be fully informed about the range of provision available to them (including things which might be off-menu); they may need to negotiate with the young person about what provision best suits them/ is most appropriate; and the provision needs to be responsive and available (ie at the most appropriate point in the young person’s activity plan).

In the following analysis, we break down this theory into its component parts and address each in turn, examining:

- the ways in which Advisers know about the provision that is available to them and how pilot management systems work to capture and share this knowledge
- the factors which enable or constrain Advisers to source ‘off-menu’ provision
- the approaches and tools Advisers use to establish young people’s needs and aspirations as a step to brokering appropriate activities
- the importance, for young people, of building a relationship with their Adviser
- the ways in which the Advisers used the regular, one-to-one meetings with young people.
- the degree to which provision is responsive and available, and the extent to which appropriate timing of activities is important.

Evidence is drawn predominantly from Adviser and young person interviews and is presented in a ‘case-study’ style format wherever possible.

5.1 Staying informed about provision and activities

In Areas 1 and 2 a menu of options is available from which young people can select activities, although they may also request activities which do not feature (see Chapter 3). In Area 3, the approach is more young person-centred in that there is no explicit menu of activities to which young people can sign-up, although advisers are aware of what is available locally and what has worked successfully before. The ways in which Advisers stay informed about provision did vary a little because of this difference, although building up experience of working in this way was important in all areas.

Keeping up to date

In Area 1, timetables for Connexions-delivered and other popular provision were set on a monthly basis, and Advisers would raise awareness of these and, if suitable, book young people into them. In addition, Advisers received a weekly email from the pilot manager about new provision that was coming on-stream. This might be as a result of tailored provision being sourced to meet an individual’s needs, although a number of places were available which were then advertised more widely.

In Area 2, the menu and options for popular provision tended to be set up within each locality. In each, Advisers and team leaders worked together on sourcing and timetabling activities for up to four-month periods. At the time of the research, the new financial year was starting and the process of re-contracting became a source of information on provision coming on-stream. Team leaders and pilot managers confirmed that new contracts were in place and Advisers added these to the menu options. Advisers reported that a slow response by providers to the contracting process had limited the activities available. In addition, some providers had not been approached for new contracts as risk assessment or health and safety procedures were unsatisfactory.

In Area 3, Advisers developed their awareness through their experiences of sourcing provision, although across the course of the two years the teams had developed a fund of knowledge about what works and which providers were most suited to the AA. If a young person wanted an activity that the Adviser had not had to source before, they would approach other Advisers for their advice and to see whether they had any similar experience. There was also an informal set-up where Advisers worked as the link between a frequently used provider and the Connexions service, although the tendency was for this relationship to be used to shape rather than contract-in provision.

5.2 Enablers and constraints to sourcing tailored, 'off-menu' provision

Young people's needs provide the drive to source and develop tailored, bespoke provision

In all pilot areas the key driver for Advisers to source tailored and bespoke provision was their clients' needs. A typical response to questions about this issue was given by an Adviser in Area 1: *'I'm pretty kind of determined if a young person says yes it's something that they want, but is serious about it as well'*. Part of the driver for this attitude was the nature of the AA itself. It is designed to provide an individualised programme of activities, and Advisers were keen to ensure this was the case. In Area 3 particularly, Advisers were confident in their sourcing of tailored activities: *'We phone up [providers] and say, "Look, is there any chance we can pay you for a course to run for some of our young people to get accreditation?".'* The Adviser also noted that most were willing to get involved. Providers were particularly responsive to offering course tasters, possibly since they might recruit some of the AA participants to longer courses as a result.

Flexible budgets and provider responsiveness are the key enablers to tailoring provision

The key enablers to sourcing tailored, bespoke and off-menu provision were:

- budget - having the money available to pay for new or adapted provision as required (ie discretionary funding)
- relationship with providers and provider responsiveness - providers being willing and able to develop the provision required by the Advisers' caseload.

Examples of tailored provision did not cluster around the young person's initial focus. Even if a young person had a strong and realistic goal, it was not necessarily the case that they had the confidence to pursue it. Similarly, if a young person did not have a clear focus, they might still be very confident in dealing with people and different situations.

In Areas 2 and 3, Advisers identified a need for tailored provision that would build confidence and also transferable soft skills such as communication, trust and working in groups. This led to work with individual consultants, to develop and deliver a range of activities which addressed these needs.

> *'[Provider] works for the Youth Service and so the Youth Service ran an afternoon, every Wednesday, an afternoon a week where [young people] would do communication issues, problem solving, team work and self-esteem issues …. And [provider], he has done some absolutely brilliant work …. He's understated, calm, reassuring … a really good person to use as a male role model, because he's not big or brash or loud … very good with communication skills and he's worked quite a lot with some young people, who have very complex communication issues …. '*
>
> Adviser, Area 2

> *'We would just be getting one-word answers out of them, they found talking to people really difficult. Between us we felt that something was needed to address that and take the first steps towards becoming more confident. We wanted a trainer who they'd feel at ease with and it had to be in a small group because large classes would just put them off.'* Adviser, Area 3

Time constraints were an obstacle to generating tailored provision

Advisers did note some constraints to generating tailored provision and these clustered around two issues:

- the time and administrative costs involved, in terms of Adviser workloads; and
- the time it could take to identify some young people's needs - some young people could not express, or did not know, precisely what they wanted in time for suitable activities to be sourced.

Advisers in Areas 2 and 3 mentioned administrative constraints. Typically they were managing 15 or more young people at any one time, and sometimes nearer 25, most of whom required a review of at least one hour a week. Advisers also worked intensively with some in their caseload, for instance accompanying them to activities or seeing them more frequently than once a week, to offer tailored activities or more intensive support.

Administrative tasks such as completing records of attendance and achievement were also involved in their roles.

> *'We could probably do a bit more of it [generating tailored provision], but it has to be done on top of all the day-to-day stuff - the admin work involved in this job is phenomenal - so things can take a bit of time to get started. We need a bit of structured time really which we can ring-fence to develop these sorts of ideas and get them set up.*
>
> Adviser, Area 3

In Area 2, the time required to travel to appointments formed a large part of this constraint.

> *'There are limited places that we can use for reviews - community centres, jobcentres - - and there's not one in every town. You can't do reviews in public places - I tried once with one lad and his mates walked past, pointing and laughing. So you have to get them to travel to a place with a venue. And then you have to work with the availability at that venue. You have to factor in the time it takes for you to travel there too. So it might take an hour to get there and an hour to get back so you have very little time for each one if you're targeted on doing four a day.'*
>
> Adviser, Area 2

The second constraint was the time it could take to get young people to vocalise what it was they wanted, and this tended to impact most on the experiences of those who did not have a strong focus on a particular career or learning pathway. This situation could be exacerbated by a change in Adviser during the Activity Agreement.

> At the outset, Robin (Area 2) was looking for work, although he did not have a particularly clear idea of what type of career he would pursue. He had been home-schooled and consequently was not particularly confident around other young people. Due to staff turnover in his locality, his Adviser changed mid-AA. During his interview for the research, he mentioned that he had a couple of courses coming up in the next few weeks - one about managing money and the other looking to boost confidence. When his programme was discussed with his current Adviser she said these courses had not been on his action plan and he had not previously mentioned them to her.
>
> *'Well, those I didn't know anything about until he suddenly dropped it in my lap and said [the previous Adviser] said she'd arranged this. I don't think we're going to be able to make them happen … I've been ringing around trying to find something and there really is nothing available that can be fitted in before he finishes his programme.'*

5.3 Establishing young people's needs

Advisers used a variety of tools and approaches to establish young people's aspirations and needs at the outset of the AA. It was common for Advisers to use Connexions' assessment, planning, implementation and review framework (APIR) in their early meetings with young people as a means to establishing future goals and how these might be met, as well as gauging the intensity of support required. In addition, Advisers used a range of tools and techniques to explore career and learning aspirations, and usage of these varied a little by the focus exhibited by young people.

The tools and techniques used to identify young people's interests varied according to focus

The tools and techniques mentioned by Advisers ranged from motivational interviewing, reviews of strengths and weaknesses, interests and hobbies, use of careers matching and information software programmes such as Kudos and Fast Tomato, as well as using CVs as a starting point.

Whatever the young person's focus at the outset, the early weeks of their programme involved work to identify their wider needs, such as boosts to their confidence, help with key and basic skills and 'soft skills' development. Time was also put into clarifying their wants and aspirations.

> *'[In the early stages of the AA], there's a lot of diagnosing, getting to know the young person and what they have going on, making sure that when they started the Activity Agreement the ideas they had, has that changed? Has their perception of that changed?'*
>
> Adviser, Area 2

Work-focused young people

With young people who had a clear focus about the type of work they wanted, the early needs identification focused on clarifying this goal to enable the AA programme to build towards this. A couple of techniques and tools were predominant here: Kudos as a means of clarification; and work on the CV to assess how realistic the work goal was, highlight strengths and identify gaps to be plugged.

Paul (Area 3) wanted to find work or an Apprenticeship for motor mechanics. The early part of the AA was to confirm the suitability of this path, using KUDOS.

'It was always mechanics [he wanted] and obviously, because we know how difficult it is to get young people into a mechanical job, I suggested anything else as a back-up and we did the session with KUDOS - it's a package on the computer where it goes through loads and loads of questions (different working environments, would you like it, would you not?). And things that were listed - suitable careers were all to do with motor vehicles.'

With young people who wanted to work but had yet to determine a clear career aim, the approach was usually more exploratory and involved discussion, motivational interviewing, and work and training exploration (including use of the software programmes and careers / training directories). Later, when provision was being brokered for this group, tasters were encouraged to enable them to experiment with different careers and to help them realise where their strengths lay and what they liked or disliked about different types of work.

Steve (Area 1) was a little unfocused at the outset of the AA although he was certain he wanted work. His final year at school had been disrupted by a house move during which his coursework was lost. The change of school coupled with this meant that he had not entered any exams. His confidence was low and he did not offer his Adviser any real ideas to help focus his programme at the beginning.

'Well, I had a calendar of activities and we can show the young person …. We went through that and he flagged up that he'd liked the computer scenario and it would be nice to actually create a game and so on, so we put that down as something he could do …. So it was just sort of putting on the table things that were available that I could provide there and then, and also explained to him that if he didn't see anything on there that he liked, he could take time and go through the Internet, or go to the library and look at courses that different providers provided and then I could negotiate with them …. It was all about getting him to do something, just get up and be committed to go and do something at the beginning.'

Learning-focused young people

The young people who identified learning as their goal were generally involved in a discussion about what they needed to improve their chances of gaining a college or training place. The approaches here tended to be more discursive and might involve setting short and medium-term goals. APIR was employed as a useful tool to identify what the young person needed in order to progress. A review of qualifications was common and, where young people were considering re-sitting GCSEs as a step towards further learning, it was often the case that alternative provision could be identified and sourced through the AA, such as literacy or numeracy training through local community-based providers (which was perceived as being more engaging/ less off-putting for the young person than returning to a school setting).

Adya (Area 1) was focused on a career working with children with Special Educational Needs (SEN). She understood that she would need training to be able to do this, and was interested in help from the AA to improve her chances upon college application.

'The first meeting was what her interests were, where does she want to go from here, what she wants to see at the end of five months [on the AA] and a long-term goal. She wanted to be a social worker in the future. I asked, "Are you going to do this – apply for colleges, go to different courses that will motivate you?". We found the childcare courses that she wanted to get into and social services was something that she really wanted to do. Again preparing and finding out everything around, planning. I asked her, "What would you like to do now?" Gave her what was available from Connexions, and she chose.'

Young people with no clear focus at the outset of their AA

The approaches to needs identification for young people who had yet to determine a clear goal were much more varied, although generally involved exploration of interests as well as strengths and weaknesses. With some, CVs were used as a starting point, whereas with others the menu and/or available activities, or college directories came into play.

Tammy (Area 1) joined the AA without any particular ideas about her future. Her Adviser suggested working on her CV as she saw it as a way of getting to know her and her aspirations better.

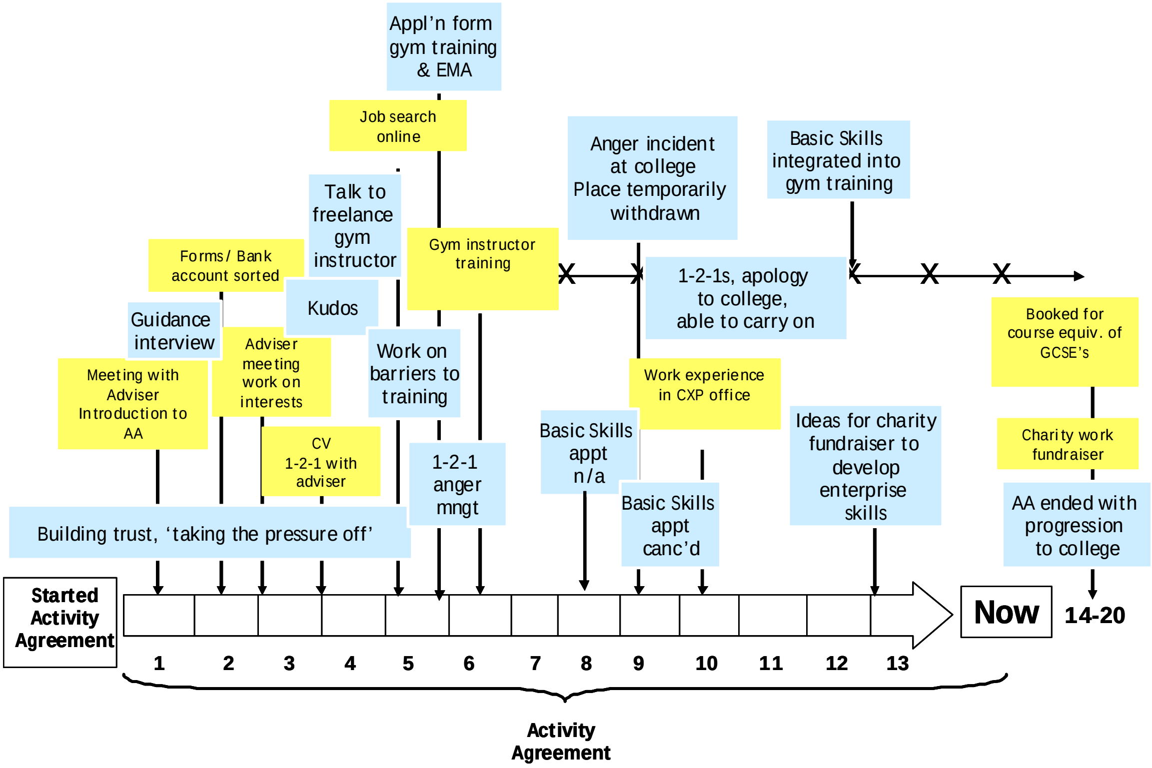
'Working on her CV, one-to-one, was a good way to do it and also I can find out more about them when I'm sitting there chatting to them. They're working at the computer and I find that sometimes they find it easier to talk to you if they're not looking at you, if they're doing something else, so you can ask them about other things and what they're interested in and then you've got a CV. You know a lot more about the young person as well, you know.'

With a couple of young people in this cluster, their barriers to engagement were immediately evident and high, and consequently the early meetings focused strongly on their personal, individual needs. Activities were considered somewhat later.

Sharon (Area 3) stopped attending school soon after the age of 14 and long before her examinations year. She found work in a restaurant using false ID and she held down this job for around 18 months until her employer discovered her real age. Her home circumstances were very unstable, she was a youth offender, and she mistrusted social workers and staff from other agencies. She was very aggressive in her dealings with other people.

'Initially when I phoned her I got a fairly negative response and told what I could go and do. She did say she had another interview lined up so I said, "Is it okay if I give you a call after it to see if you're all right?" She said it was okay. When I rang she'd not got the job and had become abusive to the employer when they'd rung to tell her. At this point she said yes [to the AA], as long as I wasn't going to try and make her go on training …. Initially I wanted to see her regularly, build a good relationship and take the pressure off completely. I said "I'm not bothered what you do as long as it's something positive for you, and if it's not training that's fine." You often find with them that's the beginning of the spectrum and over a period of time as they get to know you and trust you they're willing to look at it.'

Brokered Activity Map - Sharon, Area 3



IES, 2008

5.4 Importance of regular Adviser meetings

Successful brokerage required regular weekly meetings to review experiences, identify needs and refine action plans

For Advisers, regular reviews formed the lynch-pin of the AA. As one Adviser put it, '*We are the link between their activities and the support [they need]*'. A key part of this was to review young people's response to activities to tailor them to needs as they arose as well as building in/up activities to help young people progress. Ongoing support was required to address personal and contextual barriers to sustain engagement. Necessarily, practical issues such as travel, expenses, timetables and arrangements were also discussed.

Young people also felt that Adviser meetings were an important part of the AA and all were positive about this, although their reasons varied. One group saw the meeting as an opportunity to discuss wide-ranging issues, eg personal and contextual barriers, careers and/or learning, and more generally as an update on how they personally were responding the AA and activities. Others, often those who had a strong focus and were relatively straightforward to engage in a programme of learning and development, saw the review as practicalities-focused - what would be happening the following week and what travel arrangements were in place.

> *'I think if I'd been with anyone else I wouldn't have been that interested, but [Adviser] is dead easy to get along with … more like a friend than an Adviser. She just helps out … because she's easy to talk to and she gives good advice.'*
>
> Sharon, Area 3

'She will be ringing me some time this week to explain everything [travel arrangements and start times] …. It is quite important so I can let her know if I'm enjoying it or not. She normally just asks me if there's anything else I want to do - go anywhere.'

Colin, Area 2

A large majority of Advisers felt a once-weekly meeting was essential to all their clients: *'It's just about raising the bar and telling them that you have quite high expectations of their behaviour, but also quite high expectations of their achievements'***.** One or two felt some of their cases would sustain engagement without this, however only once they were some weeks into the AA. The types of young people who Advisers felt needed less regular reviews were those who were responding well to provision, whose focus was reasonably strong and realistic and who had few barriers (either practical, personal or contextual).

'If a young person is engaged in an activity, particularly college, on fairly full time hours, I may speak to them on the phone, or even contact the college just to make sure everything's all right. If a young person's not engaged on activities then they would always be seen on a one-to-one basis.'

Adviser, Area 2

Some young people needed more regular ongoing support

While weekly reviews were unquestionably important for most of the Advisers' cases, they felt that some young people needed more frequent support than this. This might be because of high personal or contextual barriers (eg young people with mental health problems, young carers, those at risk of offending / young offenders). More frequently, the need for support stemmed from very low confidence and self-esteem on the young person's part. Often Advisers reported that some of these young people were in more frequent contact with them anyway in-between reviews, popping into the Connexions base for a quick chat or telephoning/texting in-between meetings. However, this kind of incidental interaction was less possible in very rural areas, although even here Advisers gave their mobile numbers for young people to call as needed.

Lack of time could limit the coverage of the review to practical issues

In Area 2, Advisers felt that the rural nature of some areas constrained the coverage of reviews. The size of caseload (ideally reviewing four young people each day) coupled with the travel time to meet with some of them, necessitated a practicalities-focused review rather than a more developmental approach. *'The review has to really start with how their travel is going, whether the taxi turned up or was late … we then discuss what is coming up the following week and the arrangement for that, and then how things have gone and whether there are problems to sort out. Finally we might get a few minutes about how they are.'* The Advisers concerned felt this was somewhat at odds with the AA policy.

5.4.1 Continuity of Adviser support

Having one Adviser builds trust over time

Most young people had worked with the same Adviser throughout their AA and saw this as an essential ingredient of the agreement. Building up a relationship with one Adviser meant that they did not have to constantly update about their progress, aspirations and wants, or their personal circumstances[1].

> *'I think it is good to stick to one because you have already started with him and he knows more stuff about you. You can't always feel confident with every single person. For me when I talk to someone first then I feel comfortable instead of always changing'.*
>
> *Adya*, Area 1

> *'I think it is important because you just feel more comfortable with them and I think it is important to have the same adviser … it is just you can trust them that they will help you and it is just easier to talk to them I guess'.*
>
> Tom, Area 2

Advisers as well recognised the benefits of developing their relationship with their clients over the course of the AA: '*They get used to you as a person and your honesty'*.

Having more than one Adviser can work too

In a small number of cases, staff turnover, leave or long-term sickness necessitated a change to Adviser. Just one of the young people affected by a change of adviser felt it had impacted on their experience. The young person was in the final weeks of the AA and decided to end the AA early due partly for this reason. For most, a change of Adviser was unproblematic and this was often because they had seen or met the replacement Adviser at the Connexions base and/or in group activities. For Advisers, smooth transitions were facilitated through regular case meetings and accurate record-keeping.

Nicholas (Area 2) had three Advisers during his time on the AA but felt that this was not a problem because he had already met the others at group review meetings.

'No, it's wasn't bad. 'Cos when I had [my first Adviser] I met [my most recent Adviser] and she used to come into my reviews and help me with it and stuff, so it was good'.

His Adviser discussed how sharing information across the local team had helped to smooth transitions when a change of Adviser was required:

'There were two or three of us … PA's on the Activity Agreement and we would have a weekly meeting with a debrief on each other's clients, so we were all kept up to date with any particular issues …. So we'd try and approach it in a holistic way.'

A few young people saw the Adviser meeting as being arrangement-focused rather than for personal development, and so a change of Adviser was of little consequence to them. This group tended to have fairly clear ideas about their future and had readily engaged in activities.

[1] This is a common finding in research on similar programmes aimed at young people and in research on the Connexions Service more generally. See, for example, Hoggarth and Smith et al. (2004).

5.4.2 Timeliness of provision

Few Advisers and young people identified difficulties with the timeliness of provision, although this may speak more to the Advisers' skill in appropriately setting expectations of when core provision would start and 'selling the benefits' of related, peripheral activities. In Area 1, where popular provision is delivered to a regular timetable, young people were aware of when certain courses would start. A similar situation existed in Area 2.

In one case, a young person's core vocational activity was delayed to the time-lag involved in gaining CRB approval. The Adviser was chasing this up, although the delay it caused to the start of the core activity could not really be considered related to brokerage (as discussed in Section 3). In another, the Adviser felt the swift engagement in certificated provision had meant that the young person's programme did not 'build up' over time.

> *'I think I would probably have had it a bit more sporadic … so that it would go through the duration of the 20 weeks so that there's more of a motivational incentive - every kind of couple of weeks he'd pick up another certificate. But because he wanted to sign up to all of them then it has kind of skewed the other weeks in terms of "Right, OK, you've achieved all that you can, what else do you need?" So that's when we started looking at more kind of confidence-building through work [activities] which were, you know kind of identified now that he feels that he's getting better at it now, but it is still work in progress.'*
>
> Adviser, Area 2

A difficulty experienced by Advisers was the time it sometimes needed for barriers to become apparent. It was also the case that some new circumstance could arise mid-agreement that had to be overcome. These factors impacted on their views of the timeliness of provision. The nature of the barrier dictated how far Advisers were able to work with young people to overcome it.

Andy (Area 3) joined the AA with an aim of gaining work. He did not have a particular career focus and when the Adviser suggested a motor vehicle taster he was keen to sign-up. He attended the first couple of days and got on well. On the last day, he told us it was very classroom-based and he got bored. He managed to get hold of some alcohol over lunch-time and went into the afternoon session drunk. The tutor excluded him from the course. His Adviser noted a turnaround in Andy since we interviewed him for this study. Discussing whether he'd recommend Andy take this course with the benefit of hindsight ….   *'If we were to start over with Andy, as Andy was, then definitely not. If we were to start over and had Andy as he is now, then in my own mind I would have no reservations in allowing him to go and give things a try. I believe he's in a position now where he could actually learn from it, whereas before it was maybe for the wrong reasons and that related to something outside our control and pressures maybe from home and family life.'*

Only in a small number of cases did the lack of a particular activity affect the experience of the AA. This was often because Advisers looked for alternative and related activities that would deliver a similar skill-set or be contributory to the young person's goal in some respect. However, as discussed in Section 3, a number of Advisers, across all the Connexions areas, felt that work-sampling and work placements were missing.

Jacob (Area 2) had struggled to identify any activities he wanted for himself during his time on the AA. He lacked a clear focus at the outset of the agreement, although his Adviser was also aware that his mental health barrier was a limitation to his engagement.

'I said to him for ages "Is there anything you want to do? Please tell me". Then, in a moment of inspiration, he said "I really want to do archery". The only place that did archery was part of the quayside and it only ran in the summer, a time when Jacob wasn't with us. I did look at other places but … one of the problems with AA is because it has to be rigorous about insurance you can only really use big companies. It's a shame you couldn't have just rung up some bloke in the army and gone (if there wasn't all these restrictions), "Can you just take this young person for a day and give him some archery training?" or something. The other thing I would have liked to have done would to have got Jacob to have talked to as many people who did interesting and exciting careers. One of the things which I think is really heavily missing from Activity Agreements is the work experience aspect.'

5.5 Persuading young people of the benefits of activities

Advisers provided significant input on the benefits of any particular activity to get young people involved and signed up – as one said, *"It's a bit of a sales job'*. Where a young person was strongly focused on a particular career path, they might only see one route to achieving it and, while Advisers would source provision to meet this need, in reviews they would also undertake complementary work to broaden the young person's view. Some young people who were focused generally on getting work, without having a fixed career path in mind, required a 'small step' approach. The purpose of this was to help them become more realistic about the world of work, which in turn would help them engage with activities they initially saw as peripheral[1].

> *'I wanted him to go and research those steps, it is not something that happens overnight, and … what we agreed was that we would authorise anything that would help him move towards it … whilst introducing ideas about what are you going to do in the meantime while you are working towards this longer-term goal.'*
>
> Adviser, Area 3

If provision was available that contributed directly to the learning path a young person was focused on, there were few difficulties in getting them to engage. However, where Advisers wanted young people to broaden their activities to include provision peripheral to the core learning, such as personal development activities or something which had health benefits, some learning-focused young people were reluctant to sign up. Whether this could be negotiated around depended upon the young person as Advisers generally felt their choice was paramount, although Advisers might expect them to set out their reasons:

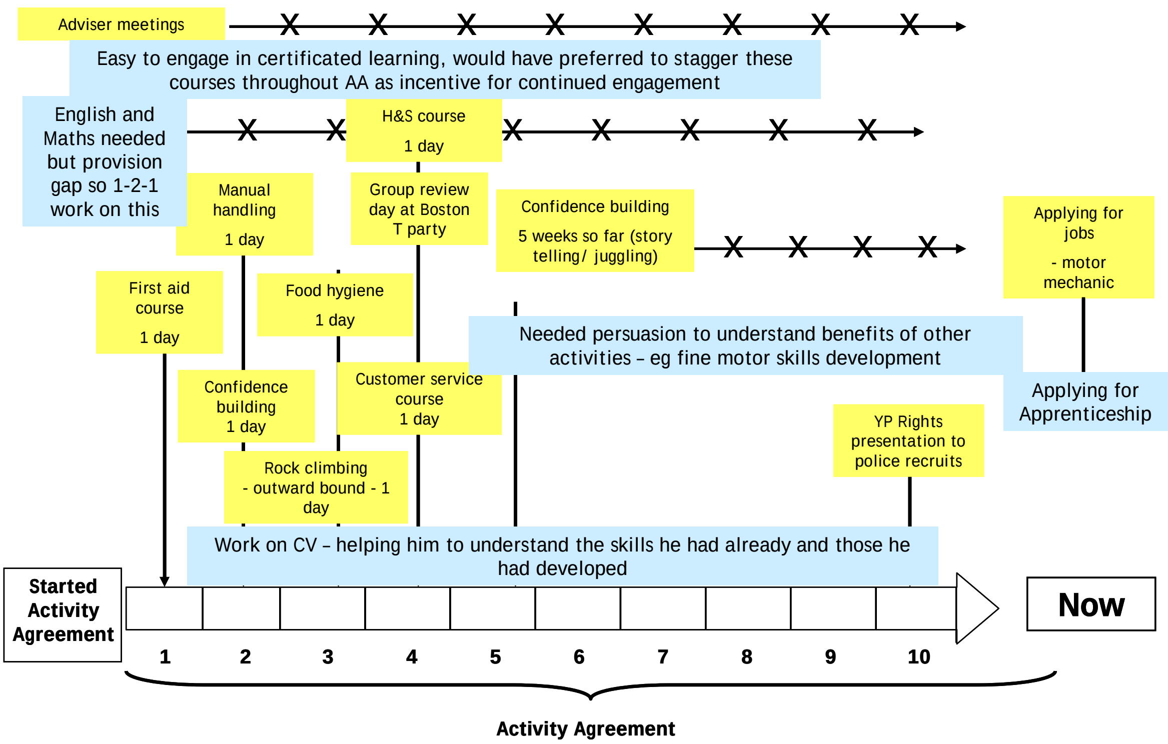
> *'I'd say, if you can give me an adult, reasoned argument as to why you're not going to do that, or why you don't want to do that, then I'll listen to you and then I will give you my reasoned arguments as to why I think you should. And we'll see what happens'.*
>
> Adviser, Area 2

[1] Hoggarth and Smith et. al. (2004) in their assessment of the Connexions Service also highlighted the importance of negotiation and trust-building between the young person and their Adviser, describing how this might build up through a series of compromises which met mutual needs, until they arrived at a 'congruence of orientation', ie a mutual understanding that they were both moving in the same direction.

Nicholas (Area 2) was focused on getting a career and training in motor mechanics. He was very keen to sign up to certificated courses, although needed persuasion to engage with what he saw as fun activities. His Adviser worked with him on the skill-sets these would deliver if he gave them a go.

'The juggling one and the drumming session, these were the confidence-building, Nicholas was like, "Juggling, that's a bit of a laugh but why am I doing that?" … so we explored what he could get from it and the drumming session because he's not particularly that interested in the music scene, he's more sport orientated and big motor skills rather than the finer motor skills. So by saying to him actually, if you want to be a motor mechanic it's the finer motor skills that are important, you're tampering around and diagnosing faults and problem solving, so when you draw it back to why they're here, what's their driven motivation, then they can start relating [to what they see as peripheral activities].'

Brokered Activity Map – Nicholas, Area 2



IES, 2008

Some of the learning-focused young people had already formulated a plan to work part-time alongside their future learning, and Advisers could use this to sell the benefits of employability skills development and short, work-focused courses such as health and safety. Other young people in this category might be persuaded to join these activities on the basis of the benefits they would offer following college or training.

Tom (Area 2) was focused on re-entering learning and recognised that his lack of GCSEs would be a barrier to this. His Adviser noted that while his engagement in basic skills provision involved little negotiation, he was not interested in other types of provision that she felt would have been beneficial.

'On his agenda was to get back into education by whatever means and because he hadn't done his GCSEs he thought [literacy] was a high priority. With hindsight I think it might have been better to introduce one of the fun elements such as the guitar earlier on [as] an incentive to get him doing things regularly, and perhaps build in maybe some Maths and English a bit later on, but he was so keen to get started on [a course] then that it wasn't really an option. He said no he didn't want any leisure activities at all, he wanted to just focus on getting the qualifications.'

Sally (Area 1) knew that her next step was college, however she was also keen to work part-time alongside this to be able to be more independent. Her Adviser had to negotiate with her to gain support for improving her CV using short, work-focused courses.
'She wants to look for part-time work and she has no experience of retail, and again we talked about improving your skills, developing yourself, that sort of stuff and we chose [a] retail course because it's an industry that's growing and even if she's at college most young people look at retail jobs to subsidise income, so having a qualification and knowing about … merchandising and ticketing and that sort of stuff puts her ahead of the game … whereas before she probably would have been really a basic application, she's got a lot more to put in that now because she's got a qualification, she's got a skill and she can use it and it's all about [that] - we talked all the time about having your transferable skills.'

With young people who lacked a clear focus at the outset, the review and negotiation of activities tended to be dependent on the barriers they had. Where the barriers were few Advisers might encourage taster activities or engagement with a Voluntary and Community Sector (VCS) provider who was delivering a range of activities suitable under the AA framework that again offered opportunities to experiment. Response to the tasters and activities would form the basis of the next step in that Advisers would work with young people to assess whether it was something they enjoyed and discuss whether a related career or learning path might be an option for progression. If this was the case, then a short course would often be sourced.

Advisers mentioned some cases where young people, possibly overwhelmed by the choices or unwilling to fix on a path in case it did not 'work out', were unable to make the decision to engage in any activities over the weeks of the AA (also discussed in Section 3). In these cases, a harder line might be taken and Advisers would try to push the benefits of taster provision, work sampling or personal development activities that would also offer soft skills development.

> *'There is lad who doesn't want to do it. He said that, "I can't see myself doing that" but I said, "So what else do you want to do? There should be something you've got to be doing otherwise you can't be on the project." I had to draw a line because weeks are passing so me telling you to do something is because I know you are intelligent, you can do it. He likes the idea of doing something but he doesn't know what to do - so that's when I told him that if you go there the first thing you will have is that you will have something to look forward to when you wake up in the morning - you will have a discipline in your life. So basically I talk them through that this is what to expect - you're not going there for that particular piece of paper but if you complete it you will have something to show on your CV - that will be quite an achievement for him.'*
>
> Adviser, Area 3

A difficulty experienced by Advisers was the extent to which young people were prepared and able to communicate their wants and needs. The focus young people had at the outset, or developed over time, did not affect this particularly. In these, reviews became a constant process of checking and re-checking whether the young person was comfortable with their options or whether they wanted something else. One Adviser had used a rating scale to help some young people express how their activities were going, so they could identify their preferred options for progression.

> *'I think that Jacob, perhaps like other young people, has a low emotional vocabulary. Not his fault, he's only 16, but I just think he's not picked it up. If I said to him, "Well, how did you feel about that activity?", he wouldn't be able to say, like I would, "It was really inspiring, I was really happy", he'd just say, "Yes, it was alright." So you have to almost provide the language for him, and that's what the reviews did. I'd say, "On a scale of 1-5, how did you feel, if 1 is the happiest and 5 is the worst?", so you're giving grades and things like that - that's how I tried to do it with young people who aren't able to express their feelings.'*
>
> Adviser, Area 2

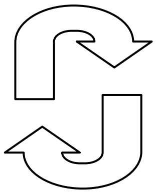
5.6 The process of brokering agreements

The intensity of brokerage needed varies at different stages and by focus

The overall process of brokering activities with young people did not particularly vary by young people's focus. However the intensity at each point of the AA journey did. The pattern of this process is shown in Figure 5.1. The first stage is engagement and establishing trust. This is followed by a cyclical process that establishes initial goals, develops initial action plans, encourages goal-related and holistic activities and reviews and refines the goal and action plan. This process continues cyclically through the AA journey. The end stage is to work on an exit strategy - an action plan for when the AA finishes.

Among those who had relatively clear work or learning goals, many were ready to engage and start doing something. Their experience of spending 20 weeks without getting work (particularly) meant that they readily recognised the value of getting some help. This contrasts with a more intensive approach to engaging with those without a clear focus, and particularly those with complex needs. Engagement for this group prioritised setting the terms and conditions: that young people have choices and the AA will be based on agreed activities related to choices. Some in this group mistrusted authority figures and needed significant time to build up trust with the Adviser prior to taking things further.

Figure 5.1: Process of brokering with young people



Stages of AA	Intensity of brokerage support according to main focus of the young person: Work	Learning	No clear focus
Engage and build trust	Light touch	Light touch	Intensive
Establish needs and any goals; action planning	Intensive	Intensive	Intensive
Confirm goal (challenge, narrow or expand goal); encourage goal-related activities	Light touch	Light touch	Not at first/not at all
Encourage holistic activities that help build towards goal; signpost & deliver support (1-2-1s)	Intensive	Light touch	Light touch
Review and refine action plan	Intensive	Intensive	Intensive
Establish exit strategies including back-up plans	Intensive	Light touch	Light touch

Key: depth of brokerage: Intensive Light touch Not at first/not at all

Source: IES 2008

No matter what their focus at the start of the AA, all young people were felt to need intensive support to indentify their needs and aspirations to begin the process of action planning. If a learning or work goal was identified then an intensive exploration of this followed, where advisers sought to ensure the goal was realistic and that young people owned the choice (in some cases the choice resulted from suggestions from other people such as parents). The priority here was to confirm the goal to enable activities to be built around it (in the form of **incremental pathways**). For some, part of the confirming process was to expand upon the goal (where the choice was narrow and the young person did not particularly understand the steps to achieving it). In other cases, more definition was required, and in others, where the Adviser was not convinced the young person was driving the choice, the goal had to be gently challenged to ensure it was in their best interest. These latter groups followed more of a **scattergun path,** trying activities related to a couple of goal ideas, at least at the start of the AA.

Where young people lacked a clear focus or had complex barriers, then the goal confirmation stage was skipped until things had crystallised (**scattergun** activity maps) and / or young people were receiving support for their wider barriers (associated with **several weeks to get started** activity maps). For those with the most complex barriers, this phase of brokering was not necessarily entered into at all and instead, their AA journey focused on intensive support and a few holistic activities.

For those with a clear learning or work focus, alongside activities that directly supported goals, indirect provision was explored to help young people build towards it in a more holistic way. These included activities drawn from the development and personal development parts of the framework of activities (see Section 2.2). Those young people with a particularly strong focus on gaining work or training might need intensive brokerage to understand the benefits of these types of activities. In some cases they could not be convinced of the value of broadening out, and activity maps **starting with a burst** would be common as over time they focused in on finding a job**.** Young people who were focused on learning would often be more readily convinced of the benefits of these holistic activities in terms of meeting new people, working in teams and having new experiences, and therefore brokering these was relatively light touch.

The review sessions offered the chance to explore what young people felt had resulted from activities and, consequently, to refine and further develop action plans. Advisers tended to think that most young people required intensive brokerage for this stage, although it was not always possible to deliver this each week due to time constraints.

The final stage of brokerage involved building exit strategies and required the most intensity for those with an ambition for work if job applications as part of the AA had not been successful. Advisers were aware that back-up plans were needed and so exit strategies would include plans for job search, ongoing support through mainstream Connexions and college or training applications - just in case.

The exit strategy for those with a learning goal was generally less intensive since college applications could be made and tasters and course inductions all attended as part of the AA journey. Therefore the exit strategy would support the entry to learning, focus on outcomes achieved and could involve the DF to purchase essential equipment and clothing for the course.

For those without a clear focus and/or complex barriers, the AA was much more about distance travelled than achieving a hard outcome such as work or learning. Exit strategies for this group included encouraging continued access to support (eg for substance misuse) and helping the young person to recognise what they had achieved as part of their AA, e.g. improved confidence and motivation, and possibly some ideas for the future to think about.

5.7 Outcomes perceived by Advisers and young people

The research focused on young people who were part of the way through their agreements at the time of the interview, which meant for most we cannot comment on outcomes and progression from the AA. Instead, our main focus is the outcomes achieved from activities and how far Advisers' perceptions were shared by young people. That is not to say that positive progression outcomes were not being achieved (as the case below illustrates), rather it was too early in AA programmes for outcomes to have occurred for most.

Steve (Area 1) had taken courses in multimedia and forklift as part of his AA, and although his longer-term goal was to work he was not fixed on a career. To help him establish a clearer aim, his Adviser set up a meeting with a Careers Adviser (CA). The CA carried out an assessment of his qualifications and skills and they agreed upon construction and identified training was required.

'There was a Construction course going at [local college] and the careers adviser spoke to him about going along there for an interview, and Steve spoke with me saying, "I don't know". I said

"Well, I know you wanted a job but you need to address your personal development" and he went along and he decided to go for [the course] and he's really happy, very happy.'

He is now enrolled on a multi-skilled construction E2E programme and planning on continuing into a construction specialism after this. His Adviser felt his experience on the AA was highly contributory to his engagement at college: it set a routine of doing something, got him involved socially with other young people, and raised his belief in his abilities.

A range of outcomes from the various types of provision were demonstrated and young people, as well as their Advisers, recognised the changes they had achieved. A lot of the gains were to confidence and self-esteem - key needs identified by Advisers for the majority of their case loads.

Since many young people did not have particularly good qualifications at the outset, the achievement of certificates from courses such as first aid, or forklift was highly valued.

However, young people recognised benefits beyond this to their participation in such activities. During a first aid course, for instance, they might have to demonstrate resuscitation in front of a group. For some, this had helped to develop their confidence.

Table 5.1 shows some examples of different types of provision and the sorts of gains young people who had engaged in them felt they had achieved.

Table 5.1: Outcomes by activity type

Activity type	Examples of Courses	Examples of hard and soft outcomes
Engagement activities	Assessment of strengths and weaknesses, CV development	Building self-esteem and confidence to engage in other types of activities
Development activities	Vocational tasters, work sampling, basic skills	Finding out likes and dislikes, confidence to try new things, improving on skills gained at school
Personal development	Creative courses, job clubs & work preparation, life-skills, outward bound, volunteering	Developing a routine, understanding own skills and abilities, working with other people, confidence
Study skills	Skills for Life, research and investigation projects	Improving on skills gained at school and improving CV with certificates, understanding the work/learning landscape and own position in this
Employability skills	Job and opportunity searches, teamwork, problem solving, interview skills, work-focused skills eg health and safety, forklift	Understanding the work / learning landscape and own position in this, understanding nature of work, improving CV with certificates to improve chances of entering learning/work, awareness of roles and responsibilities, confidence in groups/using equipment

Source: IES

All young people felt that they had got something out of their activities, whether their main gain came from the engagement building their confidence to try things, or from a particular activity. We end this section with two of the many examples of positive achievements.

Towards the latter part of his Agreement Nicholas (Area 2) heard, in a group review, that some young people were going to do a presentation to new police officers about the experiences of young people.

Adviser*: 'He wasn't scheduled to go down for it, so he actually volunteered to go along …. It was a massive step [as he would have to go to each group of officers] and say what his experiences were of the police, so he was gaining more confidence as he went around. To be able to do that is remarkable in terms of his confidence. I thought it may be a bit too early for it but he's proved me wrong!'*

Nicholas*: 'We went to this presentation thing with like a room for the police officers and I said I would speak about what we were doing on the Activity Agreement and stuff – that was good. It was a good way to build confidence because it was pretty nerve-wracking when we went in there …. It was like quite a big room full [of police officers]. I was nervous at first but then like after explaining to the police officers it was all right. It was just confidence-building really.'*

Debbie (Area 1) had a good idea that she wanted work initially as a receptionist, although hoping to progress on to be a Personal Assistant. However, she had left mainstream school provision around Year 10 and had not gained any qualifications. Her Adviser also worked with her on confidence issues, in particular building up her confidence to travel outside her local area.

'I think it's helped me a lot because whereas before I would sign up for courses but not go to them and stuff but with this one, I don't know - it just feels as though I finally want to do something with my life and I feel that this Activity Agreement has helped me in some way … what I want to do, what I need to like be a personal assistant like that.'

5.8 Conclusions

In the policy design, there was also an assumption that brokerage would inform the content of the agreements. The aim was for the 'something' on offer to meet an individual need, and in order to do this it might be necessary for the Adviser to look further afield than the usual providers. There was an assumption that the Adviser would be able to source a wide enough range of appropriate activities to enable the content of the agreement to be bespoke and tailored to each young person (reflecting the 'menu of choice' idea). The theory also proposes that the Advisers may need to negotiate with young people about the provision they need and provide alternatives based on their own experience of what works and what young people need to be able to progress.

The previous sections have outlined the ways in which the theory works in practice. Without doubt, brokerage was a key element of the AA for young people and their Advisers. All young people valued the support from their Advisers and the option of negotiating activities rather than being told what to do. Timeliness seemed the least important premise of the theory overall because Advisers set young people's expectations appropriately about the timing of activities and indeed, some planned activities acted as an incentive to sustain engagement in the AA.

Effective information management and knowledge-sharing are key to enabling well-informed brokerage

The findings strongly suggest that Advisers have significant skills to engage with, support and develop young people to achieve, or be nearer to achieving, EET outcomes as a result of AA participation. The evidence suggests that a combination of factors is important here:

- Pilot administration and particularly the pool of knowledge about what many/most young people need - whether this is the confidence 'core' (including team-building, self-esteem and motivation) or popular courses (eg construction and forklift licence). These are the sorts of activities that feature most commonly in the 'menu of choice'.

- Advisers' work histories, since many are recruited from mainstream Connexions roles or drawn from other agencies / services working with relevant groups such as youth work, education, Jobcentre Plus or guidance roles. Advisers' experiences and different areas of knowledge prior to joining the AA leads them to draw in a wider pool of providers and services which they have accessed as part of previous roles. More formally and as part of pilot management, Advisers provide a link between these providers/services and the AA.

- Pilot management develops the pool of knowledge, in that formal and informal opportunities and systems exist which allow Advisers to exchange views about what works and what is needed for different groups of young people. These include team meetings, case discussions and informal networking. This can simply be a case of finding out whether anyone else has sourced a specialist form of provision, to recommending tailored provision to the menu.

- Putting young people in control of researching niche and other provision could identify provision not previously considered. While this was relatively rare (since many young people did not require specialist provision) Area 3 particularly showed this could be beneficial as part of the AA. Evaluating the outcomes of this research, and where provision was sourced, meant Advisers could successfully recommend new types of provision to pilot resources. This process was felt to deliver benefits to the young person in terms of study skills but also in clarifying their aims and objectives.

Brokers may need to negotiate with the young person about what provision best suits them / is most appropriate, but in doing so young people still need to feel they have a choice

Undoubtedly, this is an essential part of the AA and is a key reason why young people engage. All Advisers emphasised the need to set out the benefits of provision to ensure young people were involved in activities that would deliver to their needs. With some young people, the process of getting them signed up to provision that was peripheral to their core goal was sometimes lengthy, and this demonstrated the importance of the regular review meetings. These established a supportive working relationship through which Advisers could raise opportunities and challenge perceptions. Some young people need little, if any, persuasion to engage in provision, and among these negotiation might focus more on establishing a learning or work path best suited to the individual, so that activities could build towards this.

Provision needs to be responsive and available at the most appropriate point in the young person's activity plan

There was little evidence that a delay to an activity caused particular difficulties to individuals. The reason for this was the Advisers' skills in setting expectations appropriately: if young people could see that provision that met their core goal was scheduled, they could be persuaded to participate in peripheral and contributory activities in the interim.

However, there was evidence that provision could come too soon for young people - although for some, their underlying barriers did not become evident until they at least tried to engage. Advisers recognised the potential danger in this: if a young person tried to engage, but failed, this could have a negative effect on their confidence and self-esteem, which in turn could impact on their outcomes at the end of the agreement.

A final point is that some Advisers noted that the AA is not appropriate for some young people, for instance those with significant personal or contextual barriers to engagement (such as health/ mental health problems or insurmountable problems in the home environment). For some young people the 20-week duration of the AA was not long enough and it did not offer the depth of emotional or psychological support these young people required. Often these young people had been referred for additional counselling, treatment for substance misuse or other medical or personal-related support. A key outcome for young people in this group was continuing with the specialist support started under the auspices of the AA.

6 Linking the Provision Theories

6.1 How the theories relate

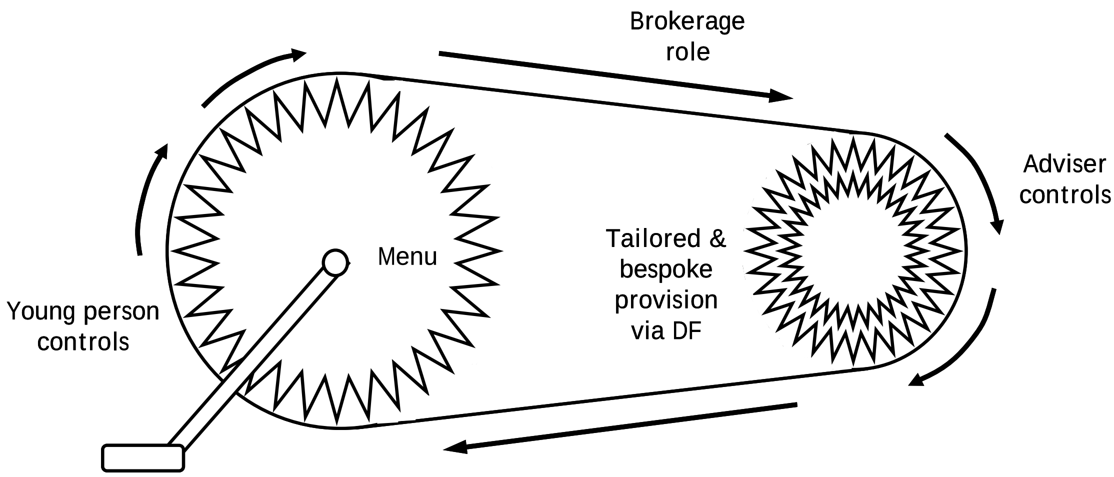
In this final part of the study, we conceptualise how the three provision-related theories fit together:

- to ensure that young people are offered provision that appeals to them and meets their needs

- to expand Advisers' knowledge about good quality provision and ensure this feeds back into the menu, and more broadly, the resource base of the pilots.

The model that we have developed to illustrate this relationship is shown in Figure 6.1 and is based on a bicycle pedal and gear system. In addition to the two points above, it encapsulates Advisers' decisions about 'changing gear' and brokering tailored and bespoke provision.

Figure 6.1: Relationship between the theories



Source: IES 2008

During the engagement phase of the AA, Advisers work with young people to get them in control of 'the pedals' (ie their AA experience) by assessing their goals and skills, and working to build trust. The menu (whether explicit or not) is used as a tool to generate some initial activities. The speed at which young people can take control of the pedals varies according to the strength of their initial focus but more frequently their confidence to engage.

For instance:

- Young people who have a realistic objective for the type of work or learning they seek, and are confident to pursue it, may readily take control.

- Young people who are interested in work or learning and have some ideas about the subject they would like to take also take control quickly and experiment with tasters and/or through short courses to help them establish choices. Advisers may focus on confidence issues around travel, meeting new people etc. in the early part of the 'journey'.

- Those without a clear focus may need time for ideas to crystallise and may be less ready to take control because of this. The menu offers enough options for them to engage in a regular routine and have a range of experiences. The Adviser works with them on confidence and may supply 'stabiliser wheels' (eg travelling with and attending activities with the young person) until their goal becomes clearer.

- For those with complex barriers, the issue at the point of engagement is whether they are ready and / or confident to be in control. Advisers may supply 'stabiliser wheels' (eg just attending weekly meetings on a regular basis, several small activities only some of which will be achieved, travelling with and attending activities with the young person) until the young person is in a position to start determining their own route.

Depending on the speed at which the young person is able to travel and the nature of their needs and aspirations, the Adviser makes the decision to 'shift up a gear' to tailored and bespoke provision. Tailored provision is often focused on personal development and recommended to AA participants irrespective of their initial focus. Bespoke provision is offered to some learning and work-focused young people and is usually a training or development activity quite specific to a niche career aim or unusual course subject. For those with complex barriers, bespoke provision may include specific support for their personal issues (for example, counselling or mentoring). Those without a clear focus tend not to access bespoke provision.

Tailored and bespoke provision is bought in with the discretionary funding and this funding acts as 'the chain':

- It provides essential flexibility to support wide-ranging needs.

- It enables quality tailored provision to become part of the 'menu of choice' and become more widely available, delivered regularly as part of the AA.

- The process of brokering in and assessing the value and quality of different activities builds Advisers' own knowledge of the range of provision available and what works (and what does not) for different types of need. This knowledge is shared through team meetings to expand the knowledge resource of the pilots.

6.2 How the theories relate for different types of young people

Table 6.1 identifies young people by their main orientation of work, learning, or no clear focus (this may firm up or change during the course of the AA) and maps against this different types of activities, potential use of the DF, and key elements of the brokerage role.

The initial focus of the young person had a strong influence on the types of activities they did whilst on the AA. At the beginning almost all young people completed engagement activities, such as CV development, so the Adviser could get to know them and devise an action plan based on their needs and goals.

After that point the young people took different paths through the AA depending on their initial focus.

6.2.1 Work-focused young people

These young people were very focused on getting a job. Some had clear ideas about what jobs they wanted, while others just knew that working and earning money was their priority. Core activities for this group tended to focus on employability skills eg interview skills, job search techniques, and work placements.

Some of the young people lacked the skills to be able to get the job that they wanted. In these cases peripheral activities for the young person may have included development activities such as basic skills or study skills in the form of short courses. These were to improve their CVs and give them a better chance of getting a job.

Additional activities for this group tended to focus on personal development to improve the young person's communication skills or confidence levels. These activities tended to be Adviser-led as young people may not have been so good at recognising weaknesses in their personal skills. Additionally the Advisers used them as 'time-filling' activities while young people were waiting for replies from applications or additional items, such as CRB checks. This group had usually reached the exit activities stage before 20 weeks. For them, exit activities tended to be job and placement applications.

The DF, where used, was particularly important for this group in terms of overcoming immediate barriers such as buying a set of interview clothes, a smart pair of shoes that were not trainers, or clothing/equipment specific to a particular job such as a hard hat and rigger boots for someone applying for construction work. Covering travel costs was also important. Brokerage for these young people focused on making sure their work goal was realistic, putting in place back-up plans as alternatives, and dealing with practicalities such as improving CVs and support to attend job interviews.

6.2.2 Learning-focused young people

This group of young people tended to have quite high career aspirations, had done relatively well in school compared with other young people on the AA (eg some C/ D grades at GCSE), and were under little pressure in their home life to get a job. They recognised that learning or training would be an essential step to reaching their career goals (occasionally after some time investigating work options).

After the initial period of engagement activities, the young person's focus was on getting into a relevant learning or training course. Study skills activities were core for this group. Many young people would research possible courses as one of their activities, or do short learning tasters to see if they wanted to pursue their initial choices.

Peripheral to these sorts of activity, some young people would have to improve their employability skills by working on their basic skills and other relevant CV-boosting certificates; or they would try work tasters or voluntary work in the area they were interested in, to get some hands-on experience.

As with the previous group, learning-focused young people did complete some personal development activities but these were Adviser-led in most cases and completed for similar reasons to those mentioned above.

Towards the end of the AA, this group was also likely progress onto exit activities, such as applying for a college place. Achieving and sustaining a positive outcome was to some extent dependent on the application and start dates of their course or training programme, and whether the young person might have to wait several months for their course to start, while having come to the end of their AA.

For this group the DF was used in similar ways as for work-focused young people, for example it could be used to buy equipment for a course such as a nail and beauty kit for someone waiting to start a beautician qualification.

Brokerage for these young people centred on working with the young person to ensure their learning goal was appropriate and linked to future career plans, and dealing with practicalities such as support for college applications. Sometimes this involved wider support such as bringing in taster courses to help the young person decide on their goal, or arranging literacy and numeracy courses to enable the young person to achieve course entry requirements.

6.2.3 Young people without a clear focus

This group were often among the most disengaged and had the most complex barriers, so the engagement activity phase tended to take longer for them. Engagement activities revolved around identifying needs and establishing a goal for the young person while they were on the AA.

The other core activities common for this group were personal development activities. These were devised to help the young person engage in the AA, build positive social relationships, and increase levels of confidence and self-esteem.

Peripheral activities were more varied than the other two groups. They could encompass developmental activities to get qualifications and certificates to improve their CVs, or employability and study skills activities in the form of tasters and trials so the young person could explore possible outcome routes. The amount this was done varied enormously depending on the barriers and the needs of the young person.

This group were less likely to reach the exit activity stage within the 20 weeks. In many cases, Advisers' aims for young people in this group were that they would leave the AA with 'soft skills' such as communication skills, social skills, and increased self-confidence. They hoped that these skills would equip the young person to reach a positive outcome in the near future.

The DF did not tend to be used as much for this group of young people as Advisers preferred to spend the money once they knew there was a goal in mind. However, these young people did benefit from tailored courses such as confidence-building programmes which had been commissioned through the DF.

For these young people, the brokerage role centred much more around building engagement, establishing routine, building confidence, identifying needs, and devising activities that would help the young person to develop a clearer work or learning goal.

6.2.4 Concluding points

It is particularly interesting to note that, despite the flexibility and tailored nature of the AA, the general types of activities that young people embarked on were quite similar, depending on their starting point. As a result there tended to be three broad 'pathways' through the AA. The framework of activities is an accurate reflection of the range of activities young people are doing on the AA even if not all the different types of activity are needed by every young person. Having a 'menu of choice' combined with the brokerage role and the DF means there is flexibility to create tailored pathways for young people, within this framework.

Achieving an EET destination, or at least reaching the exit activities stage within the 20 weeks, was far more likely for those young people who started with an idea of their progression goal or were able to develop this within the early weeks of the AA. However, some of the hardest to help young people needed to spend more of their time on the AA working on confidence and overcoming wider barriers before they were ready to develop specific routes into work or learning. Advisers commented that some of these young people need longer than 20 weeks.

Table 6.1: What works for different groups of young people (provision, DF and brokerage roles)

Types of young people	Framework of Activities							
	Engagement	Development	Personal Development	Study Skills	Employability Skills	Exit Activities	Use of DF (not inc tailored)	Adviser Role
Work-Focused Tend to be older Limited work history Need money	• Introduction • CV • Assessment of strengths • Action plan	• Basic skills • Work sampling	• Confidence building • Social activities	• Training & short courses	• Job search • Interview skills • Job clubs • Work placements	• Job and opportunity applications	• Immediate barriers (work clothes, equipment) • Travel • Bespoke courses	• Work goal realistic and owned by young person • Establish back-up plans • Support & review experiences • Practicalities
Learning-Focused Reasonable schooling Job goal requires better qualifications	• Introduction • CV • Assessment of strengths • Action plan	• Basic skills	• Confidence building • Social activities	• Training & short courses • Research projects • Learning tasters	• Job tasters • Voluntary work/work placements	• College / training applications	• Course equipment • Travel • Bespoke courses	• Learning goal is the right choice for future plans • Build motivation & confidence • Support & review experiences • Practicalities
Lacking Clear Focus No clear goals Limited/no work history Low confidence/ self-esteem Wider barriers	• Introduction • CV • Assessment of strengths • Action plan	• Careers advice • Intensive IAG • Basic skills • Work sampling	• Confidence building • Team work • Outdoor challenges • Social inclusion activities	• Learning tasters	• Voluntary work • Job tasters		• Travel • Tailored courses (through menu)	• Engage • Establish routine • Identify needs; signpost & deliver support • Work to establish a goal and pathway • Build motivation & confidence

Key: Core Peripheral Other

Source: IES 2008

7 References

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Appendix: Topic Guides and Opt Out Letter

Focused Study 3: Topic Guide, AA Participants, AA PROVISION THEORIES

The main aim of this study is to find out about the young person's experience of provision. **The main focus of the interview is the Activity Agreement and what the young person thinks about it (specifically the choice of provision, the use of Adviser Discretionary Fund (ADF), and the delivery of that provision), NOT the young person him/herself.** However, there are some early questions about the young person's background, household circumstances, attitudes etc. in order to get the interview moving and to provide important contextual information.
The section timings are guidelines only and should be viewed as a maximum rather than an average. Interviews might last up to an hour using this guide depending on the number of activities the young person is doing and how long they have been on the AA.

A. Introduction (5 mins)

This section is to set the young person at ease and give them some background about the research. Ensure to reassure them about confidentiality and to ask permission for the interview to be recorded.

- Introduce yourself and IES - emphasise we are an independent research organisation, so we are not related to Connexions or the government.
- Tell them about the research project: It is about young people involved in AA, how they found the choice of provision available to them, their experiences of the activities, and how the activities were decided on with the adviser.
- Emphasise everything they say in the interview is confidential and will be reported anonymously which means it will not be linked to them by name.
- Explain that as part of the research we will be comparing the opinions of young people and advisers about the AA scheme. This will be discussed thoroughly *after* the interview as we want them to be clear about the nature of the research before asking their permission to speak to their own adviser.
- They can refuse to answer a question if they'd rather not do so and they can stop the interview at any time.
- Do they have any questions to raise now? They can also ask questions at the end of the interview, if they want.

B. About the young person (5 mins)

The aim of this section is to get some background information about the young person including a little about their education and employment background, household characteristics, and current circumstances. This should set the scene and provide context for the rest of the interview, as well as making the interviewee feel more at ease.

1. Current circumstances (5 mins)

- Confirm whether they are currently doing or did an Activity Agreement or not? (we will ask more about this later). *May need to probe for how long they were doing it and when they started / left.*

- If they have finished the AA agreement, what are they doing now? Has that led on from the AA or is it something totally different? *Establish chronology if more than one thing.*

2. Previous experience of education

- When did they leave school? What did they think of school?

- Did they get any qualifications at school? Explore which ones and what grades. *Probe: were they happy with these?*

- What did they plan to do when they left school?

- What did they do after they left school? *Probe: work, courses, NEET periods*

C. The Activities (5 mins)

In this section we focus on their experience of the AA, how much choice was available to them when deciding on activities and how options were presented to them. We will explore the options available, whether they were things the young person was interested in, and what happened if they wanted to do something else

1. Entry to the AA

- How did they first find out about the Activity Agreement? What were their first impressions of it? *Probe: why did they think that?*

- What was it that first got them interested in doing the AA?

- What sorts of activities were available to them? *Probe: number and type of activities, any reduction due to availability.* Was this what they expected?

- How were the activity choices presented to them by the adviser? *Probe: standard list, advice from adviser, other way. Need detail - if list or timetable, what was on it? did they talk through it? What did they talk about?*

D Mapping the Activities (20-25 minutes)

1. Developing the Activity Map

In this section we will use the "timeline" to cover the period between starting the AA and now. We will talk them through week by week exploring the activities they did, how long these lasted, and noting adviser meetings. This activity map will be a comprehensive picture of their activities.

If prompts are required: *CV course, gym/swimming, outward bound, first aid, fun activities or days out, courses to develop skills*

All activities should be listed here but if something is forgotten it can be added later.

All the questions in the following section will be asked for each activity in turn (remember to ask these questions for any 'forgotten' activities).

Confirm the start date of the AA and how long they have been on the programme and add these to the timeline.

2. Discussing the Activity Map

- How did they decide to do this activity? *Probe: What was the process they went through?* Who suggested the activity? Was it explained thoroughly? Did they want to do this initially, why/why not? If not how were they persuaded?
- Did their adviser discuss with them anything they might need for this activity? *Use examples relating to the activity.*
  - *If yes* was the adviser able to provide this?
  - Was there anything they wanted that their adviser turned down? Do they know why that was? Did they have to provide it themselves?
- Did they receive anything for completing this activity? *Probe: eg a certificate.*
- Did this activity relate to something else they did or would like to do? *Probe: another activity, new career path, hobby etc.*
- What did they think of the activity? *Probe: how enjoyable, how worthwhile.*
- What were the benefits / drawbacks of doing the activity? *Probe: Soft outcomes. trying new things, skills development, new friends, confidence/self esteem*
  - Did talking to their adviser help them to see the benefits of the activity?
- If they could go back in time and make the choice again would they do this activity? Why / why not?

D. Reflection on Activities and Progression (15 minutes)

This section will focus on their overall perspective and experiences of the AA. It will explore their opinions on the choices available, examples of anything they felt was missing, and how they will use the AA to progress.

1. Experience and Reflections (10 mins)

1. Choice

- Did they get to do all the activities they wanted? Why / why not? Was anything they wanted not available?
- How important was having a choice of activities when doing the AA? *Why?*
- Are they happy with the choices they made? Why/why not?

2. Negotiation and reflections on the experience of activities

- When starting the activities did they have a clear idea of what they would achieve as a result? How did they know what they might achieve?
- How important was the regular contact with an adviser? What did they get they get out of it? *Probe: a different perspective, honesty, motivation, support*
- Without going into personal details what sort of thing did they discuss with their advisor? *Probe: Personal / skills / career development*
- Did they always the same adviser?

Note to interviewer: ask only ***one*** *of the following*

- How important was it for them to see the same adviser throughout their time on AA? *Probe: What did they get out of the meetings?*

  OR

- Do they think having more than one adviser has any impact on their experience? *Probe: why? What impacts?*

Note to interviewer: continue with the rest of the questions

- Have they experienced any problems with their activities?
  - *If yes* what problems? Why? How were these resolved?
- Have they left any activities earlier than initially agreed? Why? What were the consequences / next steps? Were any activities delayed?

3. Progression and outcomes

- What do they plan do after AA? *Probe: Explore links between their plans and the AA.*
- What has been their overall experience of the AA activities? *Probe: how worthwhile.*
- What is it about the AA that has made them feel this way? *Probe: whether it was the activities or the process of negotiation.*
- If they could improve anything about the AA what would it be? *Probe: the choices available, the activities, how they are organised.*

4. Wider Reflections (5 mins)

Introduce the next series of questions as follows…

The Activity Agreement is only open to young people aged 16 to 18 who have left school and who have not been doing any college courses, training or work for a few months. Thinking about people in this situation…

- What kind of people would be happy with the choices available? *Why?*
- What kinds of people wouldn't want to do one of the activities available? *Why*?
- What do they think could be made available to make the choices on the AA more attractive to those people? *Why?*

Closing the interview (5 mins)

Thank them for their time. Ask if they anything else to add.

Explain that we want to interview their specific Connexions adviser and what that interview will involve (show them the timeline and explain that it is just that part of the interview that we want to discuss with the adviser). Make clear that none of their answers about Connexions or the adviser will be passed on to the adviser and that this is voluntary. If they agree they **must sign the consent form and give the name of their adviser.**

Any other questions?

Give them the voucher and ask them to sign receipt for it.

Focused Study 3: Topic Guide, AA Advisers, AA PROVISION THEORIES

The main aim of this study is to find out about young people's experience of provision available through the AA. The approach uses young person centred case studies. The Adviser interview will explore views of the choice of provision available, use of the Adviser Discretionary Fund (ADF) as well as more detailed information about the provision negotiated with and experienced by young person X.

Section timings are guidelines only and should be viewed as maximum rather than an average.

A. Introduction (5 mins)

This section is to give the Adviser some background about the research. Ensure to reassure them about confidentiality and to ask permission for the interview to be recorded. Young person X's consent form will be shared with the Adviser during this introduction.

- Introduce yourself and IES - emphasise we are an independent research organisation commissioned to evaluate the Activity and Learning Agreements.
- Tell them about the research: it is about young people involved in AA and how they and their Advisers negotiated a programme of activities. We will discuss whether the ADF was used to support activities and a little about outcomes and progression.
- Emphasise that the interview is confidential and will be reported anonymously. Young people are also guaranteed confidentiality and anonymity in the report.
- Explain that as part of the research we have gathered information about the range of activities young person X has experienced and negotiated and it is this that will form a key part of the interview. We will not discuss anything confidential young person X told us about.
- Offer the Adviser the opportunity to ask any questions they might have, also mention that we can take questions throughout the interview or at the end.
- Confirm that they have responsibility for brokering and negotiating young people X's provision for the AA. *Provide copy of young person X's consent form.*

B. Background about the Adviser (2-3 minutes)

This aim of this section is to get some background information about the Adviser. The research team will also gather information about the AA within the area from the Process element of the evaluation.

- How long have they been involved in the AA?
- What were they doing previous to their involvement in AA? *Probe for a potted career history*
- Does the Adviser cover specific geographic areas or work across the pilot?

- What does their role involve? *Probe: AA only* or *AA* ***and*** *other parts of the ALA or CXP offer*?

- What are their particular responsibilities within the Activity Agreement? *Probe*: *recruitment of young people; engaging/supporting young people for the AA; negotiating activities; brokering activities; 1-2-1 review meetings with young people*

- What size case load are they typically managing for the AA?

C. Young Person X's Activities (15-20 minutes)

In this section we focus on the Adviser's perspective on the experience of the young person X. If the Adviser's case load includes two of the case study young people then the activity map for each will be considered in turn, if time allows. If their case load includes more than two participants, we will interview them a second time but cover only the map element. The pilot will be used to assess whether the second interview would be possible by phone - if the activity map is sent to the adviser in advance.

Introduce this section as follows: The next part of the interview focuses on the provision and activities that were put in place for young person X. We are interested in the process of agreeing which activities were most suitable rather than specific details about why they were required. We are not expecting Advisers to tell us anything confidential about young people. If it is possible to say in outline why any type of provision was proposed this would be useful. For instance, the Adviser might say that an activity was proposed to help with anger management (rather than detail the reasons it was required).

1. Reviewing the activity map for young person X

The interviewer will show the Adviser young person X's activity map. This will have been redrawn to ensure that the young person's recollection of activities are clearly shown and that no sensitive information is disclosed to the Adviser. We expect interviewers to guide the adviser through the map and prioritise provision for deeper examination eg it would not be appropriate to ask the full list for each review session; longer-term provision may provide a richer source of information than a one-off session. To some extent, decisions will also be based on the interviewer's knowledge of the young person's response to activity. We will test how this works within the pilot.

- Show the adviser the activity map for young person X and talk them through the things the young person mentioned they had done.
    - Check with the Adviser that the list and timing of activities is broadly correct.
    - Add in any activities that the Adviser thinks have been missed out.

2. Discussing young person X's Activity Map (12 minutes)

For each activity noted for young person X:

- How was this activity decided upon? *Probe: What was the process they went through and extent to which (any) negotiation was required for young person X to participate?*

- *If not clear* Did the activity feature on the 'menu of choice', 'core list' of activities (if these exist) or was it an activity specifically targeted at young person X e.g .through use of ADF?

- How important was it that young person X did this activity? *Probe: input/ suggestions from adviser, pre-requisite of another activity, only one available etc.*

- Were they able to schedule/commission this activity at the point they felt was most appropriate for young person X? *Probe if not, was there an impact from this?*

- Did young person X need any equipment for this activity? *Use examples relating to the activity.*

  - *If yes* was the adviser able to provide this?

  - Was there anything that young person X wanted that they turned down? Why that was? Did young person X have to provide it themselves?

- What did they think about the value of the activity to young person X? *Probe: how worthwhile in terms of purpose, did it relate to a future career path or other activities on the AA?*

- To what extent did young person X require a review process to understand any benefits of the activity?

- With hindsight, would they have recommended this activity to young person X? Why/why not?

D. Experience and Reflections on Activities (10 mins)

This section will focus on Advisers' overall perspective on the AA activities using Young Person X as a typical or atypical example of AA participants. It will explore their opinions on the choices available, and the process of negotiation and identifying benefits before and after activities took place. If the Adviser has provided information for two young people, the experience of both can be used as examples in this section. The pilot interviews will test the extent of introduction advisers need to broaden out from young person's X experience to the experience of different groups participating in the AA.

1. Choice

- To what extent did young person X get to do all the activities they wanted (or needed)? Why/why not?

  - Was there anything young person X wanted (or needed) that was not available?

  - **How common is this -** for which groups of young people?

- How important was offering a choice of activities to young person X? Why?

  - **How important is choice to AA participants more generally**? Is it more important to some groups of young people than others? Why?

2. Negotiation and Reflections on the Experience of Activities

- How important was it to offer young person X information about the potential outcomes of the different provision? What sort of information did they need? **How common is this** - and for which groups of young people? Why?

- Did the Adviser propose any activity that young person X didn't want to or hadn't considered?

  - *If yes* how was this resolved?

- Did young person X experience any problems with their activities? How were these resolved? **How common is this** - and for who?

- How important were the regular review meetings with young person X? Why? **How about to other groups within the AA** (what groups and why)?

- Did young person X leave any activities earlier than initially agreed? Why? What were the consequences/next steps? **To what extent does this apply more widely? Is it more problematic for some groups of young people than others**? If so, who?

3. Wider Reflections

This section is to gather more general reflections about the AA and is not specific to any of the young people who have been discussed earlier in the interview. Clarify with the adviser that the emphasis is on the AA generally rather than the specific experience of young person X.

Introduce the next series of questions as follows…

The Activity Agreement is only open to young people aged 16 to 18 who are not engaged in education, employment or training. Knowing what you do about young people in this situation…

- Thinking about the range of activities that are available for young people, in your view are there any gaps? If yes, what are these? Which groups of young people are affected?

- Who wouldn't want to the activities available? Why?

- What could be made available to make the choices on the AA more attractive to those young people? *Why?*

Closing the interview

Thank them for their time. Ask if they have anything else to add.

Opt-out letter

On Connexions letter-headed paper
Young Person's Name
Address

Date
Reference Number
Dear (Young Person's Name),

Your experiences on the Activity Agreement

Connexions [area] is helping with a research study of young people which aims to find out about their experience of the activities they took part in during their time on the Activity Agreement. The Institute for Employment Studies (IES) is carrying out this research, and needs your help.

Why have I been sent this letter?

You have been chosen to take part from Connexions records of young people in the area.

What does the research involve?

The research involves taking part in an interview with a researcher from IES. The interview will be held in your area and will last for less than an hour. IES will give you a £20 high-street shopping voucher as a thank-you for taking part, after the interview. The voucher can be used in various shops including JJB Sports, Warehouse, Zavvi, Boots and The Carphone Warehouse. Everything you say will be confidential and you won't be identified in the research report. You don't have to take part, or answer any questions that you don't want to. IES wants to get a full understanding of how the activities were arranged so Connexions advisers will also be interviewed later in this research. IES will only approach your adviser only with your permission.

What happens next?

If you don't want anyone from IES to contact you about the research, please telephone *(named contact)* at Connexions on *(telephone number)* and let us know by *(date)* and we won't pass on your contact details to IES. Please quote the reference number at the top right corner of this letter.

If you don't mind being contacted, someone from IES may ring you in the next few weeks to find out if you're interested in taking part in the research. If you decide to do it, they will arrange an appointment with you for an interview.

I hope that you agree to take part in this research. Thank you for your help.

Signed by Connexions officer

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