

**EUROPEAN SOCIAL FUND PROGRAMME
2007-2013**

LOCAL SPECIFICATION

NORTH WEST

MERSEYSIDE DISTRICT

REF NO: NW06

TITLE: ENGAGEMENT TO RETENTION

**Customer Journey Stages 1, 2 and 5
(Engagement, Customer Assessment and Support and Employment)**



European Union
European Social Fund
Investing in jobs and skills

DWP Department for
Work and Pensions

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1. INTRODUCTION

The North West Regional Context

The North West has a population of approximately 7 million. The region has 10% of the most deprived Super Output Areas (SOA) in England (more than any other region). Severe deprivation is evident in most districts across the North West with 17 of the 50 most deprived districts in England, including the top three of Knowsley, Liverpool and Manchester.

There are 43 Local Authorities in the North West, 13 have unemployment rates greater than the UK average of 5.5% even though their relative position may have improved considerably over recent years.

In the North West there are approximately:

- 107,000 people receiving Jobseekers Allowance
- 300,000 people receiving Income Support
- 407,000 people receiving Incapacity Benefit

The Incapacity Benefit claim rate is currently 10.3% compared with the UK average of 9.6%. There are also considerable variations in the geographical spread of people receiving benefits with high concentrations of Incapacity Benefit recipients at ward and SOA level.

The North West employment rate is 72.5%, 2% behind the England average. The employment rate is as low as 68% in Merseyside. The North West region would need 80,000 more people in work to bridge this gap.

Nationally 21% of children are in families that are in receipt of welfare benefits. In the North West region there are 79 wards where the percentage is at least the national average. Liverpool has 19 of these wards, Manchester 17 and Knowsley 8. In the Princess ward in Knowsley 68.2% of children are in families on benefit, the highest percentage in the North West.

Merseyside Strategy

DWP is looking to award a **Prime Contract** for this specification to cover the entire district. One organisation will be required to lead the contract and the successful provider will have to directly deliver some elements of the provision. Providers may bid to provide the entire provision themselves i.e. without using any sub- contractors. In this case they must demonstrate that they have sufficient capacity, capability, and expertise within their organisation to do so in addition to delivering any existing contracts for DWP and for any other organisations. The successful provider will be expected to demonstrate links they would create with local organisations to meet the requirements of this specification.

This specification sets out the criteria for the provision to be delivered through ESF in the Merseyside District. Prospective bidders will be required to submit full and detailed proposals, meeting the specific criteria below. The local information supplied at **Annex 2**, may assist the development of your bid.

The North West Customer Journey

To ensure that DWP ESF provision adds value to existing mainstream provision and other programmes in the North West region, a 'Customer Journey' has been produced to clearly highlight the interventions and activities currently delivered by Jobcentre Plus and partners to progress customers from welfare into work.

This journey has enabled us to identify the following potential areas for 'value added' activities and each Jobcentre Plus district has identified their requirements within some or all of the stages of the Customer Journey. In table form, these stages of the journey are shown in **Annex 1**.

Caseworker support

A fundamental part of the 'customer journey' is the continuous support offered through a caseworker. The caseworker will deliver one-to-one mentoring to ensure that the customer progression from engagement through to entry into sustainable employment is maximised.

This can include hand off to LSC funded programmes particularly when the customer is ready for skills related Information, Advice and Guidance.

Within most of the North West Districts, DWP require Providers to deliver mentoring support through a caseworker as an integral part of the ESF programme.

Mentoring will not focus on advice and guidance regarding training or employment, as this is already delivered through mainstream contracts. Instead, it will deliver a support mechanism which addresses multiple barriers to work, such as debt, housing, disability, offending background, alcohol and drug misuse. This will be achieved by effectively introducing customers to appropriate agencies, facilitating an effective 'hand-off', before collecting the customer once more to continue on the customer journey towards sustainable employment.

Providers will need to demonstrate an understanding of the diverse needs of each customer group in delivering this support and describe how the mentor will engage and support them through the 'customer journey'.

Caseworker support can be accessed at any stage of the 'customer journey', with referrals originating from a variety of sources, including Jobcentre Plus staff based in local prisons and engagement activity undertaken by the caseworker themselves. It is expected that the caseworker will make referrals to ESF and mainstream employment and skills provision as well as specialist support to address barriers to work.

Bidders will need to show how caseworker support will operate, including how often the mentor will engage with different customer groups. An agreed action plan would be required for each customer which would be updated following each intervention. Mentoring could take place at any venue suitable to both the customer and the Provider. On occasions it is expected that the Provider may be required to accompany the customer to interviews with either other key organisations or employers.

2. AIM OF PROVISION

The aim of the project is to provide outreach activity delivered from locations within deprived communities in Merseyside for example delivery from within Community Centres, Children

Centres or by use of a mobile facility, to engage with low income households i.e. the “In Work Poor”, workless customers and those furthest from the labour market to help them realise the personal need and benefit of work utilising ideas such as motivational training, allowing individuals to gain the confidence to progress to engagement activities which will also benefit the local community. This should assist transition to up skill individuals via training provision and into employment. The project will also provide In Work support to aid retention in employment.

3. DESIGN AND CONTENT

Indicative contract value: **£13m to £16m**

Contract Start : **June 08 to May 2011**

Duration of contract **3 years with the possibility of an extension to 2013. The value of the extension will be up to 50% of the contract value**

Minimum number of participants **6000 over the three year contract duration.**

4. DEFINITION OF ACTIVITY REQUIREMENTS

The outreach and retention activities will be achieved by providing **new and innovative** ways to engage with individuals. Support will be provided by early identification of needs, and barriers to work will be addressed. These may include but not be limited to debt, health conditions, childcare and training. Once identified an individual Action Plan will be drawn up. The activities offered will be tailored to the personal needs of the participant, providing after care to participants ensuring that when successful in gaining a job they have the skills and equipment required to accept the offer of employment and remain in employment during the crucial first six months. Caseworker support must be an integral part of the activity to ensure that the participant makes continued steady progress towards employment and this progression continues once in work.

OUTREACH AND ENGAGEMENT ACTIVITY

The outreach and engagement activities delivered will

- Enable the unemployed **and** inactive customers enter and remain in work by addressing their barriers, encouraging and supporting them to make the mind shift from worklessness to work. Caseload contact must be maintained for all customers tracking progress and offering support as required.
- Help lone parents and others with children identify and overcome the barriers preventing them from entering into sustainable work and ultimately making progress within the work place.
- Engage with the priority groups with a view to increase employment amongst Black and Racial Minorities, Refugees, Offenders, People with Disabilities, Ex Offenders, people with drug and alcohol misuse problems and homeless people. These customers will be sign posted to appropriate support projects/agencies and ensuring that peer mentoring is available.
- Engagement with inactive older customers developing their skills with the aim of increasing their employability and retention in work.

- Identify specialist support agencies and organisations to engage and work with customers during progression to training and employment. Identify appropriate provisions.
- Identify and signpost to appropriate provision including but not limited to NDLP, Pathways to Work, Skills for Jobs and Train to Gain.
- In work support will be offered to customers who have a job to start.
- Provide and manage a customer discretionary fund to overcome and address individual's specific financial barriers to starting a job such as providing proof of ID, setting up bank accounts, rent deposits, clothing to attend interviews etc. Providers should note that this fund is to be used in addition to ADF and is also for participants who are not eligible for ADF through Jobcentre Plus.
- Provide opportunities for customers to engage with and be involved in the delivery of community-based projects and volunteer activities. These activities will motivate inactive individuals and facilitate their integration into the labour market. Projects can include the use of existing successful regeneration activities as well as the development of new and innovative projects. These projects should be available to those customers who are not yet ready to move into the labour market.

-These projects will **increase confidence and motivation** whilst developing communication, interaction and team working skills addressing individual barriers.

-They should also **raise awareness** of the full range of support services and in work benefits in order to ease the financial transition from benefits to employment also providing **mentoring** that will continue into 'In work Support'.

RETENTION

The aim of the retention element is to provide in work support for a minimum of 26 weeks to customers returning to employment in order to sustain retention in the work place. The element will also be available to those customers not previously engaged with any outreach activities. These customers may be referred from Jobcentre Plus or other providers following participation on employability skills, or other employment preparation provision but must still have a barrier preventing them from entering and remaining in employment. This barrier could be financial, childcare, transport or self confidence, although this list is not exhaustive. The caseworker should provide a tailored package of support to overcome the barriers and enable the participant to enter and remain in work.

Examples may include: -

- Working with customers in employment who are absent from work through ill health offering a package of support, particularly early intervention to avoid long – term dependency on benefits and facilitating timely return to work thus avoiding potential worklessness.
- Support to provide retraining for employees to move to a new role when they can no longer continue in their current role due to ill health.

- Debt management and advice on budget management.
- Identification and signposting to up- skilling/retraining provision appropriate to the customers occupational area and skills for life.
- Encourage and support employers to provide Mentors in the work place.
- Advice on managing the work/life balance.
- Advice on travel to work options including sign posting where appropriate

DWP expect contractors to subcontract with organisations from the voluntary and community sectors that have a proven track record in working with the specific customer groups especially the most disadvantaged e.g. those involved in substance misuse, Black and Racial Minorities, the homeless and ex-offenders

Contractors will be required to co-operate fully with the City Employment Strategy Pathfinder at the sub-regional level, with Local Authorities and to work closely with local projects on the ground for maximum synergy.

DWP would welcome innovative methods of delivery and the above activities are not exhaustive.

5. TARGET GROUPS

1. People on IB especially those with children (reflects Child Poverty Agenda);
2. Lone parents- including support for those with health problems or requiring jobsearch skills especially in preparation for increased conditionality;
3. People with disabilities;
4. Other people with children including those not on benefit;
5. Most disadvantaged e.g. Black and Racial Minority Groups, Refugees, homeless people, offenders, ex offenders those with drug and alcohol misuse problems and those who persistently return to claim JSA;
6. City strategy provision-work-focused provision to support the activities of Cities Consortia;
7. People with Basic Skills needs; and
8. Jobseeker's Allowance customers.

It is expected that:

- 41% of participants are expected to be unemployed
- 34% of participants are expected to be inactive
- 22% of overall starts should be participants with disabilities or Health conditions
- 12% of overall starts should be participants who are Lone Parents
- 18% of overall starts should be participants aged 50 and over
- 5% of overall starts should be participants from Black and Racial Minorities
- 22% of overall starts should be female participants

6. GEOGRAPHICAL COVERAGE

All aspects are to be delivered from community locations within the Liverpool, Sefton, Knowsley, St Helens and Wirral Local Authority areas. Locations should be selected to ensure that they are easily accessible by the priority customer groups.

7. ELIGIBILITY

ESF Priority 1 eligibility:

- Unemployed and economically inactive

Disadvantaged groups:

- People with disabilities;
- Those with health conditions;
- Lone parents;
- Older workers;
- Black and Minority ethnic communities;
- People with low skills;
- Those living in deprived communities;
- Excluded people

It will be the provider's responsibility to check the eligibility of each participant prior to starting the programme.

8. REFERRALS

It is anticipated that a minimum of 70% of participants will be recruited from non Jobcentre Plus sources. Jobcentre Plus advisers may make some referrals to join the project but these will be the exception rather than the rule and the Provider cannot rely on these to achieve their target.

9. COHERENCE AND CONTEXT WITH OTHER PROVISION

This programme is designed to support participants through the customer journey and ensure that the participant makes the required progression. It will add value to other types of provision available from both LSC and DWP/Jobcentre Plus at the various different stages of the journey. The programme will not duplicate any existing provision but complement by providing mentoring/case worker support, which has been identified as a missing element within these existing programmes.

It is envisaged that participants could join this programme at any given stage of their journey towards employment and beyond. These participants may be referred from other partner organisation, providers and Jobcentre Plus.

Please note that participants should not access both the ESOL/ Basic skills provision and the Outreach through to Retention programmes at the same time. Once participants have completed the ESOL/Basic skills provision they may if appropriate access the Outreach to Retention programme.

10. NETWORKING/LINKS

Bidders must provide evidence of how they work with local employers, providers and partnerships. This must include a list of your contacts, the role they play, and how they will contribute to the development of the programme, how their input will be evaluated and how you will measure the added value from their participation. If organisations do not have such experience then they will need to provide details of how they will address this gap.

Contractors will be required to co-operate fully with the City Employment Strategy Pathfinder at the sub-regional level with Local Authorities and to work closely with local projects on the ground for maximum synergy. Contractors should demonstrate links to existing successful regeneration activities and projects.

It is inherent that networking & productive working relationships with local partners are key to the successful delivery of the whole programme which will reduce the participant's dependence on welfare benefits and stop the revolving door.

11. MARKETING

The successful bidder will require a pro-active approach to ongoing marketing and promotion of their programme with potential participant groups and appropriate stakeholders within the local authority areas defined. A marketing plan should be produced covering the duration of the contract that will detail the planned activity to engage participants.

12. FUNDING MODEL RATIO/INDICATIVE VOLUMES.

The expectation is that a minimum of 6000 participants will be engaged during the period up to March 2011.

The provider will be expected to achieve a job outcome rate of a minimum of 22%. Participants entering employment will be expected to be retained in employment for a minimum of 13 weeks out of a 26 week period following completion of the provision. This is in line with the DWP definition of retention.

The funding model will be as follows:

50% Delivery Payment

50% Job Outcome Payment

Please see part 10 of the Specification for England, which describes in more detail the funding model element.

13. NON PAID OUTCOMES

It is expected that a proportion of the participants will need to access a range of tailored training provision to enable them to progress in their journey from welfare to work. This could include provision such as mainstream ESOL/Basic Skills, Skills for Jobs, New Deal or other specialist provision available within the Merseyside area. The contractor will be required to use their knowledge of local provision to identify the most appropriate option for the participant and make the necessary referral.


Job retention will be a key objective of this programme and will be measured through contract management and evaluation. Participants completing the programme will need to be tracked for a period of up to 26 weeks and information about their destination will need to be retained to demonstrate achievement of this non-paid outcome.

The contractor will be required to establish a monitoring system that will enable them to record the destination of leavers and capture referrals for participants to other provision or specialist support services.

14. EVALUATION.

Bidders must demonstrate how they will evaluate their own delivery of this programme and that of their sub contractors detailing identification of areas for improvement and subsequent implementation of Performance Improvement activities to redress any under performances and quality issues, this must be done alongside any DWP/ESF requirements

Annex 1 - The Customer Journey

Stage in Customer Journey		Areas identified for value added activity
Engagement stage	<div style="display: flex; align-items: center; justify-content: center;"> <div style="writing-mode: vertical-rl; transform: rotate(180deg); border: 1px solid black; padding: 5px;">CASEWORKER SUPPORT</div> <div style="margin: 0 10px;">  </div> </div>	<ul style="list-style-type: none"> ▪ Engaging with harder-to-help customer groups currently outside mainstream activity and provision, delivering support to overcome barriers to participation and developing confidence. ▪ Identifying families in poverty and linking them with key agencies e.g. housing, childcare, health and training, developing packages of support and addressing multiple barriers. ▪ Caseworker/mentors linking with Jobcentre Plus prison staff to engage with offenders on release and addressing their individual needs. ▪ Engaging with long-term recipients of IB who are not engaged through employment-related activities. ▪ Supporting customers with disabilities who have not engaged through mainstream employment activities.
Customer Assessment and support		<ul style="list-style-type: none"> ▪ Correct identification of needs. ▪ Use of additional aptitude testing and/or taster sessions. ▪ Establishing a detailed mentoring programme that delivers to all customers and integrates with LSC provision.
Access employment/skills support		<ul style="list-style-type: none"> ▪ Interventions to support LSC Skills for Life provision. ▪ Support for non-claimants with children, including jobsearch, work placements, careers advice, guidance plus the opportunity to achieve vocational qualifications. ▪ Support for IB customers to tackle confidence, motivation and financial issues. ▪ Community Projects to help priority customers to develop employability, soft and basic skills and overcome other barriers to employment. ▪ Work experience activity to enable IB customers to undertake work related activities. ▪ Support to help socially excluded customers engage with mainstream DWP provision.
Pre-employment support		<ul style="list-style-type: none"> ▪ Providing specific help to disadvantaged people to help them find and keep a job. ▪ Delivery of short, responsive training linked to larger recruitment opportunities with employers offering guaranteed jobs.
Employment stage		<ul style="list-style-type: none"> ▪ Providing support to employers through Local Employment Partnerships by complementing the help available to them through other DWP provision.

Annex 2 – Local Information

Wirral Area

Traditionally, much of the employment on Wirral was founded on the shipbuilding industry, but now it is firmly based in the service sector, with an emphasis on clerical/administrative, retail and caring professions. Major employers are the Local Authority, NHS Trusts/Health Authorities, Central Government departments and the Lever Faberge group.

A number of large local companies take on casual seasonal workers. Consus Integrated Communications are a call centre handling international contracts Wirral Waterfront Regeneration is seeking to develop an 'employment corridor' from New Brighton to Eastham, taking in the Twelve Quays Development, with its new sea link to Ireland, and an ever-growing number of companies at the International Business Park in Bromborough.

Liverpool Area

Many Employment opportunities within Liverpool are now based within the service sector, with an emphasis on clerical/administrative, retail and caring professions. Major employers are the Local Authority, NHS Trusts/Health Authorities, Central Government departments and organisations within the service sector. Seasonal workers may be needed during the summer and during Christmas for the retail sector. The Speke/Garston and waterfront developments have brought new employment opportunities to the area.

Greater Mersey

Greater Mersey district is located in the North West Region, the District encompasses three Local Authorities, Knowsley, Sefton and St Helens. Covering the towns of , St Helens, Newton Le Willows, Bootle, Crosby, Kirkby, Maghull, Formby, Huyton, Prescott and Southport . With JCP offices in St Helens, Newton Le Willows, Bootle, Crosby, Kirkby, Maghull, Formby, Huyton, Prescott and Southport .

The District working age population claim Jobseeker's Allowance, 12.0% Incapacity Benefit/Severe Disability Benefit and 9.4% Income Support.

Principal industries and Key employers:

The main employers in the Greater Mersey District are Local Government the NHS, and the Civil Service. A large number of people are also employed in Contact Centres, Call Centres and in the leisure and retail service.

Main industries in the district are retail with many highstreet chain store outlets such as Next, Wilkinsons and Primark opening stores in the main shopping areas and expansions of major supermarket chains. Domestic and social care sector vacancies remain high for residential care homes in Southport, Southport NHS Trust, various Local Authority care homes across the 4 boroughs. Call centres are a main employer, such as 02, QVC, Alliance and Leicester, Littlewoods, Argos and Vertex (insurance companies) with large call centre operations across the district. There is still some manufacturing mainly in St Helens and Knowsley area, although on the decline

With the recent regeneration of Southport seafront and the involvement of the area in Liverpool 08 Capital Culture, opportunities in tourism and leisure are reappearing.

Growth sectors also include science with the prestigious logistics and warehousing with many new distribution centres and construction, with three large housing regeneration projects in the District, Build Sefton consortium in and around Bootle, regeneration project in North Huyton building consortium project, which will commence shortly to replace housing stock in the Huyton area.

There are also considerable inward investment projects in the District. Including St Helens and Whiston hospital development, expected to generate approx 1,000 construction vacancies between 2007 to 2010, and eventually 600 hospital vacancies when the hospital's open. St Helens due to open July 08 and Whiston 2010. Two new hotels and a leisure complex being built in Southport, the new Kennet Prison near Kirkby opening in June 07.

A new 25-acre business park, 'Alchemy' under development with phase one just completed and a large new warehousing and distribution centre in Knowlsey.

Expansion of Bootle docks underway, as part of the Liverpool Sea Ports development and the re-development of Widnes waterfront including 3MG, Merseyside Multi-modal Gateway due for completion in July 08, a large warehousing and freight terminus, providing over 200 logistics and warehousing vacancies.

Future major developments due to start in the district are the Parkside Freight terminal, at the old Parkside colliery St Helens, commencing late 2008. Proposals for the Kirkby town centre, football stadium and Tesco's development, and the Omega business park in Warrington, which will also impact on Burtonwood on the border with St Helens .