



LINCOLNSHIRE & RUTLAND

**EVALUATION OF THE
LINCOLNSHIRE CONNEXIONS PILOT**

REPORT 6: UNIFICATION OF DIAGNOSTIC INSTRUMENTS

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CGS
Guidance Studies

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PREFACE

The author wishes to gratefully acknowledge the help and support of all partner organisations and individuals who have contributed towards the pilot project. A significant amount of time and energy has been devoted in order to develop innovative ways of assessing and diagnosing young people's needs. I am greatly indebted to everyone involved in the project for their willingness to openly share ideas, experiences and knowledge.

A special vote of thanks is given to the initial project team members as follows: Rachel Boothby (Careers Adviser), Boston Centre, Lincolnshire Careers & Guidance Services Ltd; John Chambers (Area Youth Worker), South Holland; Bill Cooper (Team Leader), Gainsborough Centre, Lincolnshire Careers & Guidance Services Ltd; Lynn Greenfield (Local Evaluator), Lincolnshire Careers & Guidance Services Ltd.; Sarah Mellor (MIS Administrator), Lincolnshire Regional Access Centres; Sam Murphy (Development Manager), Derbyshire Career Services Ltd.; Tony Roberts (Chief Executive), Lincolnshire Regional Access Centres; and Steve Walker (Careers Adviser), Skegness Centre, Lincolnshire Careers & Guidance Services Ltd. I am also particularly grateful to both Rachel Pope and Carole Lang, Connexions Manager, Lincolnshire for providing regular updates on national and local developments.

Finally, the pilot could not be tested out without the active involvement of young people, parents/carers and personal advisers in the Lincolnshire community. On behalf of the Project Team, I wish to express our sincere appreciation for the contributions made that informed our work. The views and experiences of young people, parents/carers and professionals working in a wide range of youth support agencies are vital to help identify what works best and how current practices can be further improved.

**Roy Pell
Project Team Leader**

EXECUTIVE SUMMARY

The Government's Connexions Strategy aims to ensure that all young people have the opportunity to learn the skills they need to make a success of their adult life. This report highlights developments within one of the ten Lincolnshire Connexions Pilot Projects designed to test out ideas and to help inform future Connexions policy and practice.

The 'Unification of Diagnostic Instruments' Pilot Project aimed to address issues linked to one of the eight principles underpinning the Connexions strategy, namely, 'meeting individual need and overcoming barriers to learning'. The accurate identification of individual need is critical for the appropriate deployment of resources within Connexions Partnerships and to ensure efficient and effective responses to identified client need.

Section 1 provides an overview of the context, rationale, aims and objectives of the pilot project. Key tasks and milestones are outlined followed by a brief introduction to the extent of additional resources provided by the Department for Education and Employment (DfEE) Connexions Service National Unit (CSNU). This enabled the project development work to be extended particularly in relation to the practical application of an accessible Intranet/Extranet web-based platform that could be used by Connexions staff as part of their work with young people.

Section 2 outlines the project team structure including inter-linkages between the project and other local and national developments. The chosen methodology was designed to ensure that a broad range of 'user' views were sought concerning issues related to the use of assessment and diagnostic products. The process of developing an Intranet/Extranet framework to assist in the categorisation of a broad range of instruments is discussed. Seven key components relating to the guidelines and principles used to inform the work of the project are outlined.

Section 3 reviews the set milestones and main achievements of the pilot project. The findings show that much has been achieved in a very short timescale. Strong multi-agency links have been developed with key partners sharing expertise, skills, knowledge and experience within and across agencies. The issue of how to effectively assess and diagnose young people's needs is briefly explored and the findings show that a broad range of instruments and tools are currently available. The main challenge is to find suitable ways of locating these within a structured and accessible framework. The need for joint training between agencies is discussed taking into account the role of the personal Adviser. Protocols and agreements for sharing 'client' information are identified as crucial. Finally, the process of monitoring and evaluating the progress and setbacks experienced by the project is reviewed with evidence of tangible positive outcomes and achievements.

Section 4 discusses the findings and key learning points. It raises the issue of how best to involve representatives from Connexions partner organisations and explores the need to reduce duplication of effort and add-value to new and existing practices. The importance of closer co-operation, communication and co-ordination between agencies is emphasised alongside the need for clarity at a national level on definitions of 'assessment' and 'diagnosis' of young people's needs. The relationship between theory and practice is discussed and the findings show that theoretical underpinning is required to effectively support practitioners and managers in their work. The findings also highlight the need for adequate resources to enable pilot developments to be applied and tested within a rigorous evaluation process.

Section 5 provides a set of recommendations to inform the future development of Connexions work in Lincolnshire and Rutland and national rollout plans.

1. INTRODUCTION

Context and rationale

- 1.1 The Government's Connexions Strategy aims to ensure that all young people have the opportunity to learn the skills they need to make a success of their adult life. A key component of this strategy is the 'Connexions Service' – a new service for young people aged between 13 and 19 years old. In Lincolnshire & Rutland, the Connexions Service becomes a reality in April 2001 and this report highlights developments within one Lincolnshire Connexions Pilot Project to test out ideas and help inform future Connexions policy and practice. The 'Unification of Diagnostic Instruments' Project is endeavouring to address issues linked to one of the eight principles underpinning the Connexions strategy, namely, 'meeting individual need and overcoming barriers to learning'. The accurate identification of individual need is critical for the appropriate deployment of resources within Connexions Partnerships and to ensure efficient and effective responses to identified client need. This will influence levels of Connexions Service 'value-added' performance in making a genuine and positive difference to the life chances of clients.
- 1.2 As one of the ten Lincolnshire Pilot projects exploring Connexions Service issues in a rural setting, the aim of the 'Unification of Diagnostic Instruments' Project is 'to increase our ability to diagnose client need and share this knowledge across a range of organisations in order that best use is made of information gathered'. The 'value added' factors include the avoidance of assessment/diagnosis duplication with the associated saving in time and energy for clients and practitioners, the potential to utilise more sophisticated instruments and to develop a more coherent approach with sharing of instruments and assessment outcomes within the network. These benefits should facilitate more focussed and appropriate interventions with clients to alleviate/resolve identified needs and barriers to progress in learning (Appendix Q).

Aims and Objectives

- 1.3 The Project commenced in September 2000 and was scheduled for completion in March 2001. The aim was:

'To increase our ability to diagnose client need and share this knowledge across a range of organisations in order that best use is made of information gathered.' (Pilot Project Development Plan, 2000)

The following key milestones were formulated:

- (i) to establish a Project Team and a 'Reference Group';
- (ii) to map all assessment/diagnostic tools being used by a range of Lincolnshire organisations with young people in the 13 – 19 age group with an emphasis on main points of transition (particularly age 13/Year 9);

- (iii) to produce an ICT (CD-ROM) and hard copy professional reference resource that describes each assessment/diagnostic instrument and its application;
- (iv) to develop protocols between organisations for the sharing of information gleaned through the use of assessment/diagnostic tools;
- (v) to monitor and evaluate the project.

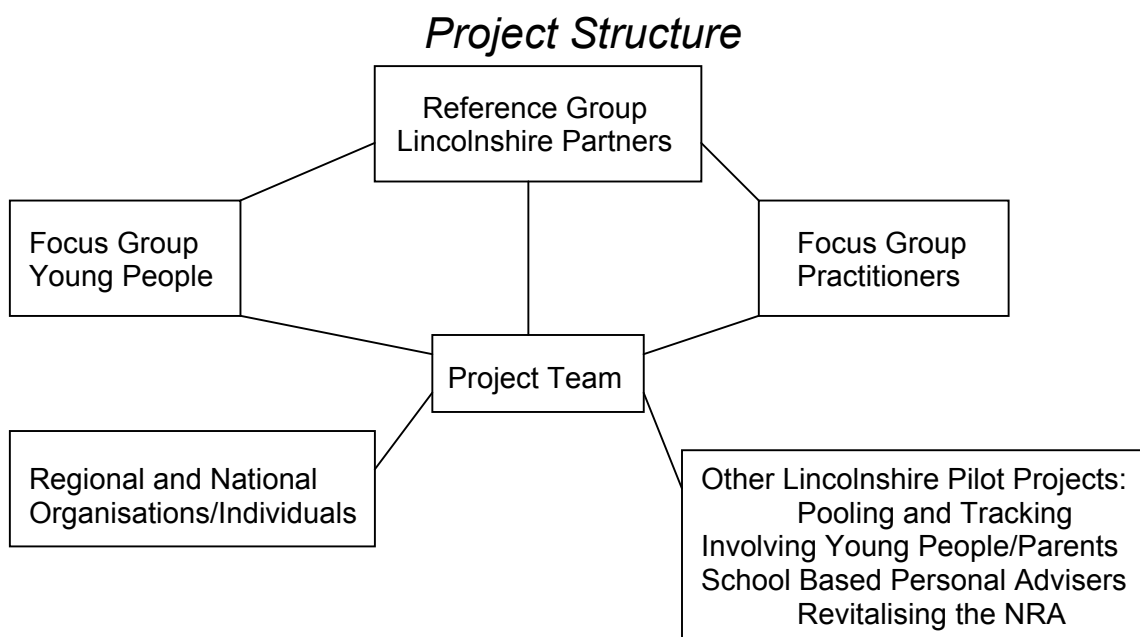
In January 2001, additional funding was approved and three new milestones were added:

- (vi) to develop the CD-ROM further and produce a user-friendly 'Framework' with practical application accessible on an Intranet/Extranet web-based platform;
- (vii) to make recommendations for assessment/diagnostic instruments that may be central to the Personal Advisers' preferred portfolio;
- (viii) to implement cross-service awareness sessions with relevant staff about the use and range of assessment/diagnostic tools available.

2. METHODOLOGY

Approach and working guidelines/definitions

2.1 During August 2000, a Project Delivery Plan was compiled taking into account the initial £16,000 funding available (Appendix A) and a Project Team of five interested individuals (Lincolnshire Careers & Guidance Services Ltd., and the Lincolnshire Youth Service) was established to implement the Delivery Plan. Appendix R provides specific details of the project team membership. The inter-linkages between the Project Team and other groups were:



2.2 As a result of the additional £15,000 funding from January 2001, the Project was restructured to incorporate a larger team drawing on local, regional and national

expertise. All original Delivery Plan and new benchmarks were cross-referenced to the revised structure. Appendix B provides an overview of the project structure from Jan. 2001 with benchmarks, tasks and allocated funding. This included a Steering Group and four theme groups outlined overleaf.

<i>Theme 1</i>	Theoretical Platform - Categorisation and Awareness-raising
<i>Theme 2</i>	Mapping, Editing and Administration
<i>Theme 3</i>	Protocols and Legal
<i>Theme 4</i>	Technical Environment and Infrastructure

2.3 The 'Reference Group of Lincolnshire Partners' involved representatives from a wide range of organisations and strong links were maintained with other relevant projects within the Lincolnshire Connexions Pilot to ensure that relevant learning was shared at the earliest possible opportunity. The 'Unification of Diagnostic Instruments' Project Team was also keen to both keep up-to-date and take into account any relevant regional/national research or other developments that may inform the Project.

2.4 An 'Evaluation Strategy' was drawn up in September 2000 and revised during January 2001 in view of the widened scope of the Project (Refer to Appendix C). Focus Groups were incorporated to gain 'user' views about products emerging from the Project such as the:

- CD-ROM and Intranet/Extranet 'Framework' categorising the range of assessment/diagnostic instruments available in Lincolnshire identified through the mapping process.
- Hard copy professional reference resource.
- Protocols between organisations for sharing information about assessment/diagnostic instruments and outcomes from this process.

2.5 At the outset, the Project Team agreed some basic working guidelines taking into consideration local and national developments. The key components informing the project were as follows:

- (a) The development of a 'Framework' or 'Matrix' categorising instruments with direct practical application for a universal Connexions Service taking into account an emphasis on those young people requiring more 'intensive support' and 'in-depth guidance for those at risk of disengaging';
- (b) The use of the term 'Personal Adviser' to denote all categories of 'Adviser' drawn from a range of organisations and either employed by or sub-contracted to the Connexions Service;
- (c) That Personal Advisers would be trained to common standards and provide young people with high quality guidance, advice, information and other support delivered from a wide variety of locations (a very rural setting in the context of Lincolnshire & Rutland);
- (d) That Personal Advisers would undertake core profiling assessments on a 1:1 basis with young people capturing changes to circumstances in close liaison with other services - in the short term, only with those clearly demonstrating the need for 'intensive support' and 'in-depth guidance' but, in the medium term, incorporating all young people;

- (e) A definition of 'diagnostic instrument' as being any instrument that assists the process of needs diagnosis through assessment identifying supportive factors and single/multiple barriers (potential/actual) to progress in learning;
- (f) A definition of 'assessment' as shown in Appendix H with assessment techniques ranging from 'soft' informal discussions to 'hard' formal, objective interventions under standardised test conditions;
- (g) The general use of 'assessment and diagnosis' to demonstrate and distinguish between elements of the process.

3. MILESTONES & ACHIEVEMENTS

3.1 The key milestones and achievements are discussed as follows:

Milestone I

Multi-agency Project Team and 'reference group' established and maintained

- 3.2. The Project Team up to the end of December 2000 consisted of:
- Four staff from Lincolnshire Careers & Guidance Services Ltd.
 - One member of staff from Lincolnshire Youth Service.
 - One member of staff from Derbyshire Career Services Ltd.

The team met formally on a monthly basis with ongoing dialogue as and when necessary. The 'Reference Group' had representatives from thirty organisations with ongoing contact with a linked Project Team member. The Project Manager actively participated in the multi-agency 'Quality Protects Assessment Group' meetings involving the Social Services Directorate, the Education Welfare Service, the Police, the Health Authority and the National Health Service (NHS) Trusts.

- 3.3 In early January 2001, a new project structure was compiled with a revised key activity statement, expanded objectives and recruitment of additional team members (Refer to Appendix B). Team members were allocated to a particular theme group linked to interests and level of knowledge/ expertise. National representation from DfEE and other relevant organisations was agreed in terms of their involvement in the Project Steering Group and 'Theoretical Platform, Categorisation and Awareness-raising' theme group. Appendix C provides an overview of meetings that took place. Individual agencies and services gave their full support to the project and developments were communicated to all team members. Each group had an identified Co-ordinator and this arrangement worked well. A post-Pilot plan was compiled with a recommendation for a small dedicated multi-agency team to progress this initiative and theoretical underpinning of the 'Framework' (Appendix L).

Milestone II

Instruments currently being used in Lincolnshires mainly with Y9 are being mapped, together with the training required to use them

- 3.4 An instrument mapping questionnaire was developed (Appendix F) and was used with 'Reference Group' partners (Appendix H) through face-to-face meetings between a nominated team member and the organisational representative. The team initially agreed that a broad range of key organisations should be contacted in order to understand the potential range and quantities of instruments being used with young people in Lincolnshire. For each identified instrument, an attempt was made

to complete a 'Brief Analysis' profile, collect a copy of the instrument itself, note any other critical information (1 side A4 max.) and to seek authorisation to enter data on either the CD-ROM/Extranet. By Xmas 2000, approximately thirty-five instruments were mapped with thirty-four entered on the original demonstration CD-ROM (Refer to Appendix G and H).

- 3.5 In January 2001, the additional funding enabled a 'Mapping, Editorial and Administration' Team to be established (Refer to Appendix B). In view of the vast range of instruments being identified, it was agreed to focus only on instruments being used in schools for Year 9 students, those used in Year 11 by Lincolnshire Careers & Guidance Services Ltd. and instruments collating baseline assessment data for pupils at the end of Year 8. By end March 2001, approximately forty instruments were entered on the Extranet (Refer to Appendix I).
- 3.6 The DfEE Connexions Service National Unit (CSNU) agreed that the project could 'road test'/trial inter-departmentally approved Connexions Service documentation in an electronic format within the Extranet system. These documents included:
- 1) General Client Information
 - 2) Contacts/Issues Arising
 - 3) Referrals
 - 4) Personal Action Plan
 - 5) Evidence of Supporting Factors/Barriers/Need by Dimension.
- 3.7 A post-Pilot plan was compiled with objectives to widen the range of instruments being mapped to include those used across the whole 13–19 Connexions Service age group (Refer to Appendix L).

Milestone III

Professional reference sources (ICT and hard copy) that describes instruments and their application

- 3.8 A demonstration CD-ROM (V 1-3) was produced (Refer to Appendix H) consisting of a 'Personal Adviser Framework for Assessment, Diagnosis, Action Planning and Review' process with instruments being categorised into the 'Framework'. Approximately forty instruments were mapped of which thirty-four instruments and associated 'Brief Analysis' details were entered on the original demonstration CD-ROM (Refer to Appendix G and H) and forty-seven on the Extranet (Refer to Appendix I).
- 3.9 A hard copy professional reference resource was established at Lincolnshire Careers & Guidance Services Ltd. Headquarters (Refer to Appendix I).
- 3.10 Following receipt of positive feedback from a broad range of respondents who had been introduced to the Demonstration CD-ROM, it was agreed that the information communications technology (ICT) mechanism should become a web-based platform. In January 2001, a 'Technical Environment and Infrastructure' theme group was established (Refer to Appendix L) and a paper was produced summarising 'The Vision – Features of Proposed Assessment and Diagnosis Extranet' (Refer to Appendix E). The Extranet development site is now 'live' (Refer to Appendix J). A post-Pilot plan was compiled with objectives to consolidate and expand the content of the Extranet and hard copy professional reference resource (Appendix L).

Milestone IV

To undertake cross-service awareness training in diagnostic instruments

- 3.11 In order to achieve this a 'Theoretical Platform, Categorisation and Awareness-raising' theme group was established (Refer to Appendix B). Given the Extranet will be available for road-testing from 1 April 2001 onwards, the post Pilot plan contained objectives to undertake general cross-service awareness training with more in-depth input for PAs currently on the Diploma course (Refer to Appendix L).
- 3.12 A multi-agency 'walk through' event took place in March 2001 involving representatives from the Connexions Service National Unit, PA Consulting, the Humberside Partnership, together with senior managers and practitioners to road-test the 'APIR' Framework Consultation proposals (refer to Appendix M).

Milestone V

To identify those tools which might be central to a PAs preferred portfolio

- 3.13 The objectives of three groups namely the Project Steering, the Mapping, Editorial and Administration theme group, and the Theoretical Platform - Categorisation and Awareness-raising theme group established incorporated aspects addressing this milestone. The project team also worked closely with Professor James P. Sampson, Florida State University to utilise theoretical concepts that could inform the development of the Extranet system. Through the support provided by the Centre for Guidance Studies, University of Derby, the project team explored the possibility of developing a short diagnostic instrument that could be used with front-line staff when dealing with young people's initial enquiries. The feasibility of this approach is currently being explored with DfEE and other relevant organisations. Strong links have also been established with the Connexions pilot in Coventry and Warwickshire, as well as, Lifetime Careers Service, Wiltshire.
- 3.14 Some local validity criteria were identified and these could be further developed to assess instrument quality levels and assist in the selection of tools that may be central to a Personal Advisers portfolio. The post-Pilot plan contains objectives to enable a fuller identification of tools which might be central to a PAs preferred portfolio given the limited resources of the current project and emerging national lists of instruments (Refer to Appendices I and L).

Milestone VI

Protocols for sharing data gleaned through the use of diagnostic instruments

- 3.15 The UDI Project Manager co-ordinated a Lincolnshire Pilot *Confidentiality and Information Disclosure Awareness-raising Seminar* which was well received by the majority of delegates who represented a wide range of organisations. Summary notes of the event were sent out to fifty colleagues based in Lincolnshire and Rutland and throughout the East Midlands. (Refer to Appendix N).
- 3.16 An assessment and diagnosis 'Protocol and Legal' theme group worked closely with the 'Pooling and Tracking' Connexions Pilot Project. This was identified as good practice considering the potential areas of overlap. It became clear that organisations were keen to consider using protocol minimum criteria for sharing data gleaned through the use of diagnostic instruments.

The suggested minimum criteria were circulated via 'Steering Group' and 'Protocol and Legal' group meetings (Refer to Appendix O). The post-Pilot plan contains objectives to progress this issue (Appendix L).

Milestone VII

The process should be monitored and evaluated

- 3.17 Monthly reports, financial and statistical returns were compiled including monthly LCGS website updates (Refer to Appendix K). It was noted that organisation and administration arrangements were clearly documented throughout the development phase and this is one of the key strengths of the project. The close financial management of the project ensured that expenditure remained within budget constraints. An initial 'Project Evaluation Strategy' was also drawn up and then revised during December 2000 in view of additional Project funding being received.
- 3.18 Internal Evaluators attended a total of six project meetings and one Local Evaluator joined the Steering Group (Refer to Appendix B).
- 3.19 The Project Manager delivered three workshop sessions at a national /regional conference hosted by the Centre for Guidance Studies, University of Derby, in November 2000. This provided a valuable opportunity to gain evaluative feedback on the Demonstration CD-ROM. Further positive evaluative reactions to the CD-ROM were also gained through discussion with representatives from the Connexions Service National Unit and Consultants, DfEE, The Humberside Partnership, the Centre for Guidance Studies, Lifetime Careers Consultancy, the 'Theoretical Platform' group. This feedback supported a successful bid for additional funding to develop identified project potential through transferring CD-ROM 'Framework' ideas to an Intranet or Extranet web-based platform (Refer to Appendix D).
- 3.20 A small focus group of practitioners undertaking the Personal Adviser Diploma course took place in January 2001 to review the demonstration CD-ROM and report recommendations supported the Extranet development (Refer to Appendix C and E).
- 3.21 In March 2001, a postal customer satisfaction evaluation exercise took place to gain organisational views of the process and instruments mapped to date. The aggregated responses received are shown in Appendix C. In addition, an ICT based professional reference source has been produced in both a CD-ROM format and as an Extranet web based platform. The 'hard copy' reference source is in the process of being compiled and an evaluation questionnaire has been produced for delivery with potential users (Refer to Appendix C).
- 3.22 It was crucial to listen to the views of young people and parents/carers therefore key questions were developed for a survey of client views linking in with the 'Involving young people and parents' Pilot project (Refer to Appendix P).
- 3.23 Other informal approaches were used at a national and local level to identify new instruments that could be incorporated within the agreed web-based platform. One team member reported back favourably on a new instrument entitled 'ProMICAD'. Team members also attended four regional/national assessment conferences to gather information about developments elsewhere in the UK including instruments not currently being used in Lincolnshire.

3.24 The selected CD-ROM dimension factors/headings were evaluated against the findings of a Lincolnshire Learning Gateway Lifeskills Review undertaken in October 2000. All identified barriers were included in the CD-ROM 'Framework' of dimensions (refer to Appendix C and H). The post-Pilot plan contains a range of suggested areas for evaluation during the period April – Sept. 2001 (Refer to Appendix L).

3.25 A chronological list of achievements from August 2000 to March 2001 is contained within the Project Website Briefings as shown in Appendix K.

CD-ROM 'Framework' to Extranet Web Based Platform

3.26 The Connexions Service will seek to assist all young people in planning their transition through school into adult life. For many young people, this process will be carried out as part of standard school and college provision. However, young people with specific or multiple difficulties may require additional help from the Connexions Service, which will be determined following assessment and diagnosis of their needs.

3.27 The 'Framework' was developed to support Personal Adviser assessment, diagnosis and planning practice across the universal Connexions Service. It provides access to definitions, organisational and instrument directories, agreed/draft protocols for sharing information and draws together and categorises a wide range of instruments being used by agencies in Lincolnshire in their support of young people (Refer to Appendix H). With agreed permissions, some instruments have been made fully interactive with potential for use on computer networks or as hard copy with clients in any setting. PAs can enter search parameters to assist with the selection and use of appropriate instruments with clients. It is a dynamic system and will evolve through time. User feedback mechanisms are an integral part of the 'Framework' to ensure a cycle of continuous improvement.

3.28 Through the Young Person's Connexions ID number, the 'Framework' also gives access to mechanisms for recording and longitudinal monitoring of client assessment and diagnosis profiles. These clearly identify barriers to participation and progression in learning at key stages of transition (Refer to Appendix H). The 'Framework' encompasses action planning, referral and review of progress to provide a holistic view of a young person's development through assessment and diagnostic processes within the Connexions Service.

3.29 Having developed the demonstration CD-ROM and gained approval for additional funding, the key challenge was to transfer the CD-ROM 'Framework' to a secure but interactive Intranet/Extranet web based platform. Also, to establish protocol agreements with core partner organisations to share 'recommended' assessment/diagnostic instruments together with some information relating to assessment outcomes. Qualitative and quantitative aspects of the CD-ROM 'Framework' were further developed to a point where a small number of approved practitioners could access and utilise the Extranet facility at point of contact with the client in any setting/situation where connection to the WWW is possible. In the short term, particular attention will need to be given to ensure the Project 'Framework' remains in line with national thinking whilst at the same time reflecting the needs of clients and practitioners in Lincolnshire & Rutland.

4. MAIN FINDINGS

- 4.1. The main findings resulting from project activities are discussed and these are presented in order to summarise the key issues and learning points stemming from the project.
- 4.2 On reflection, it would have been beneficial from the outset for the Project Team to have at least one nominated representative from each key Connexions Service partner organisation e.g. Education Welfare Service, Careers and Guidance Services, Local Education Authority, NHS, Social Services Directorate, Youth Offending Service and Youth Service. This approach would have engendered a more equitable multi-agency ownership, understanding and commitment to the project aims, objectives and activities. It should be noted that project activities and achievements have been strongly reliant upon the goodwill of many agencies.
- 4.3 Discussions and attendance at meetings/conferences have indicated that many agencies are currently considering the same theme, namely, working more closely together in partnership to benefit clients. However, there is duplication of effort as each Government Department kick-starts its own initiatives to achieve these common goals e.g. multi-agency groupings, assessment frameworks, instruments/forms to name but a few! Closer co-ordination, co-operation and communication of activities at all levels are essential.
- 4.4 Ongoing refinements to national definitions and concepts relating to the Connexions Service, particularly the role of Personal Advisers, have caused ongoing uncertainty and confusion. The co-ordination of five project multi-agency groups has been a challenge. This has demonstrated a need for an appropriate dedicated multi-agency staffing and funding resource to enable this complex and exciting initiative to achieve its potential.
- 4.5 The development/identification and use of generic underpinning assessment and diagnosis theory with application across agencies could promote more effective working together in partnership and a unifying bridge between disciplines. Theories relating to Professor James P. Sampson's work on Cognitive Information Processing (CIP) and 'States of Readiness' may prove to be interesting avenues for further research.
- 4.6 The Project has raised many interesting theoretical issues and possibilities for consideration – these should not be lost and have been built into the post Pilot plan. Objectives need to be prioritised in accordance with their importance to the electronic and manual applications of the 'APIR' Framework.
- 4.7 The Probation Service should be included in any extension of this initiative taking account their role and work with clients aged 18 and 19 years old.
- 4.8 Actions undertaken so far have demonstrated that many Lincolnshire organisations are happy to work more closely together, to share good practice and details of activities. The devised 'Brief Analysis' profile mapping instrument has received positive feedback and has worked effectively (Refer to Appendix F). There are a vast number of assessment/diagnostic instruments being used by many organisations in Lincolnshire with young people aged 13 –19 years old in a wide range of different settings (Refer to Appendix G and I). As a result, project objectives and activities were re-focused in line with available resources.

- 4.9 Our findings suggest that the categorisation of instruments within the 'Framework' could mirror qualification levels being developed for Personal Adviser and technician level staff (Refer to Appendix H and J). However, clarification is required from the CSNU, on expected levels of Personal Adviser competence in using assessment instruments with clients.
- 4.10 The plethora of 'Action Plans' may well cause some confusion as a single client could potentially have any number of these produced in conjunction with many organisations (Appendix I). Further research is warranted to reflect on the possibility of rationalising the number and types of 'Action Plans' in use. There is tremendous scope for further action and development in relation to this objective after end March 2001 (Refer to Appendix L).
- 4.11 Local Project Team findings and proposals linked in well with the nationally developed 'APIR' Framework (Refer to Appendix M). The emerging electronic 'Framework' will need to be realistic, accessible, logical, user-friendly, flexible, easily maintained, valid, secure and have practical application within an integrated process.
- 4.12 There is still an urgent requirement for a nationally approved selection of initial/front-end multi-dimensional screening questionnaires and checklists to identify potential/actual client needs for use in all Year Groups at appropriate times. Such instruments must have 'utility' – be quick, easy, relevant and cost effective for practitioners to deliver and clients to use. Further work should be undertaken to confirm the range of pupil needs being identified as a matter of course within school/college PSHE curricula.
- 4.13 Accessible and 'live' electronic mechanisms are required to deliver instruments, data and ideas. The transfer from CD-ROM to a secure web based Extranet web based platform has maximised electronic potential, interactivity and usefulness for users (Refer to Appendices E and F). The editorial workload in converting manual documents to an electronic format should not be under-estimated
- 4.14 There are instruments and other relevant developments elsewhere in the UK that may be appropriate for use in Lincolnshire & Rutland (Appendix I) - these need to be evaluated and utilised if beneficial. It is important that Lincolnshire developments remain in line with national thinking whilst at the same time retaining a local 'flavour'.
- 4.15 It may be fruitful to investigate joint funding possibilities by a range of Connexions partner organisations to maintain and develop the assessment and diagnosis Extranet in the medium and longer term – protocol agreements may need to include this point.
- 4.16 Great care needs to be taken to ensure all the electronic system is maintained up-to-date and that partner organisations have properly authorised the presence/use of their instruments etc within the 'Framework'. Again, protocol agreements between partner organisations may need to include this point.
- 4.17 There is tremendous scope for further action and development in relation to this objective after end March 2001 (Refer to Appendix L). Clarification is required about the role of many partner organisations within the Connexions Service before appropriate staff awareness-raising sessions can commence.

- 4.18 The assessment and diagnosis Extranet will be available for cross-service awareness training during April 2001. Project resource allocation, staffing arrangements and the complexities of technical infrastructure have limited progress within the available time-scale.
- 4.19 Confirmation of national developments and requirements in relation to the Personal Advisers role and recommended instruments is required as a matter of urgency. Tools which might be central to a Personal Advisers portfolio are indicated in Appendix I. National and local attention needs to be given to this objective beyond Connexions Pilot.
- 4.20 Protocols for sharing data is a complex issue as European legislation is now being implemented in the United Kingdom. Research was undertaken and notes were sent to all participants and other interested parties (Refer to Appendix N). Our findings suggest that the essential ingredients for success include:
- staff training/awareness at all levels within the Connexions Service re. legislation, policies, procedures and standards;
 - the need for a Connexions Service Common Client Consent Form;
 - Connexions Service clarification of the purpose for needing to record, gather and share client data; protocols for cross-boundary (LSC) data transfer.
- 4.21 There is potential, subject to agreements, for the Connexions Service to work closely with the Social Services Directorate in supporting those 'vulnerable children' aged 13–19 years old. Lincoln Healthcare Trust and the Social Services Directorate are developing a 'Common External Agency Referral Form'.
- 4.22 The concept of a pupil contact 'time-line' with organisations for assessment and diagnosis purposes should be developed and included in Connexions Service literature/electronic systems. This will enable partner organisations and clients to know when and what information will be collected and by whom.
- 4.23 Extranet security systems will be critical for credibility and maintenance of user confidence. System maintenance and development protocols need to be negotiated together with user security and registration agreements.
- 4.24 It is unclear whether or not agreement to share assessment and diagnosis information will have to be gained from each individual school or if one central protocol negotiated with the LEA will suffice for 'Maintained Sector' institutions. Evidence suggests that for 'Maintained' schools, the Lincolnshire LEA should be in a position to supply, subject to protocol agreement, individual Year 7 CAT assessment details for 95% of schools and Year 9 SAT assessment data for all schools. This issue has major implications for the content of Connexions Service Partnership Agreements with schools and needs further investigation.
- 4.25 Whilst willing to consider issues, organisations are very concerned about the potential for litigation in relation to disclosure of information. A national lead on legally watertight protocol content would be very helpful. PAs using manual and electronic systems must ensure that clients do not complete more than one Common Client Consent Form.

- 4.26 Agreements may need to be developed regarding access to instruments with Crown copyright and possibly with 'INCLUDE' for access to PA Diploma course materials. There is some indication that copyright for ASSET documents is held centrally by the Youth Justice Board whilst DOH documentation has a wide range of copyright holders. Approval for ASSET documentation entry on to the Extranet may be easier to gain than for those within the DOH 'Framework'.
- 4.27 There is tremendous scope for further work on assessment and diagnosis protocol development with key partners including educational institutions. This is indicated in the post-Pilot plan (Appendix L).
- 4.28 The proposed 'Framework' met with a good deal of support and enthusiasm. Personal Adviser training programmes should include an overview of assessment instruments in use and, crucially, the organisational context within which these are used with clients.
- 4.29 A focus group of Personal Adviser practitioners recommended that the CD-ROM should be made 'live', totally interactive and fully searchable to be of maximum use. The Extranet development should resolve many of these concerns and ensure a high degree of 'utility'. The inputting of 'Brief Analysis' profiles on to the Extranet will be adapted in light of practitioner comments so that questions without answers are omitted until completed by authorised Service representatives. A full 'Brief Analysis' profile questionnaire without any answers will be shown separately on the Extranet site for access as required.
- 4.30 It is important to ensure the validity of any proposed assessment and diagnostic instruments used within the Connexions Service. Key headings to underpin a local set of instrument validity criteria have been identified. Also direct links to related theory. Further investigation is recommended. In order to remain valid and current, dimension factors and headings in the 'APIR' Framework should be regularly tested against actual barriers to progress in learning being experienced by Connexions Service clients at any point in time.

Summary

- 4.31 This initiative will only fulfil its potential if adequate resources are made available. There has been an ongoing need for additional practitioner support across all key agencies/ services to release Project Team members and significant others from normal day to day work commitments. Project achievements have been constrained by lack of dedicated and flexible staff resources. The Project Manager has spent a great deal of time duplicating discussions in order to up-date those not able to attend original meetings. Also the lack of a national steer, particularly in relation to data sharing protocol development, has hindered progress. In view of the high volumes of information processed by the Project Team and the vast development potential in this field, it has only been possible to 'scratch the surface' of this fascinating initiative within the allocated resources and short time-scale. Whilst some prioritisation is required, the post-Pilot plan indicates the range of outstanding objectives for attention including many areas for evaluation activity including an assessment of efficiency, effectiveness, utility, sustainability and impact on clients and practitioners.

5. RECOMMENDATIONS

- 5.1 In order to provide a more coherent approach, avoid duplication of effort and staff confusion at all levels, there is a significant need for closer inter-departmental co-ordination and communication in relation to the development and implementation of assessment 'Frameworks' and definitions. Inter-linkages between 'Frameworks' need to be clearly sign-posted and explained commonly across all departments. The development/identification and use of generic underpinning assessment and diagnosis theory with application across agencies could promote more effective working together in partnership and a unifying bridge between disciplines. (paras.4.2, 4.5, 4.6 and 4.21).
- 5.2 Action is urgently required to clarify the role of partner organisations within the Connexions Service and their specific contributions to client assessment/diagnostic processes and practices (para. 4.17).
- 5.3 Clarification is required in relation to expected levels of Personal Adviser competence in using assessment/diagnostic instruments with clients. Personal Adviser training programmes should provide relevant levels of skills, knowledge and understanding of assessment/diagnostic practice including instruments generally being used within partner organisations and the context within which these are used with clients. (paras. 4.4, 4.10 and 4.28).
- 5.4 Developmental work needs to be urgently undertaken to provide valid and approved initial or front-end cross-dimensional screening questionnaires/checklists to identify potential/actual client needs for use with individuals/groups aged 13 – 19 years old at appropriate times (paras. 4.12. and 4.14).
- 5.5 A nationally approved list of validated assessment/diagnostic instruments is required to link with specific 'Framework' dimensions and required levels of PA competence. Issues relating to instrument Copyright should be dealt with centrally by DfEE to ensure equitable Personal Adviser access to appropriate instruments. In the Lincolnshire & Rutland context, further research is needed to evaluate/obtain evaluative studies of available instruments being used elsewhere in the UK with a view to adopting best practice. Whilst it is important that assessment/diagnostic developments in Lincolnshire & Rutland remain in line with national thinking, it is probable that a local 'flavour' will emerge reflecting client barriers/needs linked to rural 'disadvantage' (paras. 4.4, 4.10,4.14. 4.19, 4.20 and 4.26).
- 5.6 Further investigation is recommended to clarify the range of individual assessment data held by both Lincolnshire & Rutland LEAs and whether or not a centrally negotiated protocol to share such information via the Extranet web based platform can be agreed to incorporate all 'Maintained' schools in Lincolnshire & Rutland. Emphasis should be given, initially, to gather baseline data for pupils at the end of Year 8 or start of Year 9. Clear statements relating to assessment and diagnosis need to be developed for Connexions Service Partnership Agreements with both 'Maintained' and 'non Maintained' sector schools and colleges. (para. 4.24)
- 5.7 In view of the legal complexities associated with data protection and information disclosure, a national lead is required to assist the development of data sharing protocols, common client consent and referral forms. This particularly relates to arrangements and standards for sharing client assessment and diagnosis information. Organisations are concerned about the potential for litigation following any information disclosure. (paras. 4.20 and 4.21).

- 5.8 The concept of a client assessment and diagnosis contact 'time-line' illustrating key points/ages of potential/actual intervention by a range of organisations should be utilised in the Connexions Service marketing strategy for young people, parents or carers, practitioners and others. This should encompass paper-based literature as well as electronic systems (para. 4.22).
- 5.9 The initiative to unify diagnostic instruments in the context of the Connexions Service is complex and will require further funding including dedicated staff resources to both develop effective practical applications and fulfil its wider potential as indicated in Appendices E and L. Accessible, 'live', interactive, user-friendly, secure and credible web based electronic systems with 'utility' should continue to be developed and maintained in a co-ordinated way as a means to deliver instruments, data and ideas within the Connexions Service. The 'Brief Analysis' profile has proven to be an effective tool for mapping instrument criteria and should be used as a baseline for any similar future activities. There is also a need for a range of evaluative studies including the views of clients, parents/carers and practitioners incorporating different macro and micro aspects of the electronic system as indicated in Appendix L (paras. 4.4, 4.13, 4.14, 4.15 and 4.31).
- 5.10 Joint funding possibilities should be investigated with a range of Connexions partner organisations to maintain and develop the assessment and diagnosis web-based platform in the medium and longer term (para. 4.15).
- 5.11 The Probation Service should be included in any extension of this initiative in view of their role with clients aged 16 - 19 years old (para. 4.7)
- 5.12 Categorisation of instruments within the 'Framework' should mirror qualification and competence levels currently under development for Personal Adviser and technicians (para. 4.9).
- 5.13 Further research is warranted to consider possible rationalisation of the number and types of 'Action Plans' currently being used by a variety of organisations with clients aged 13 – 19 years old (para. 4.10)
- 5.14 The development of local validity criteria should be investigated for implementation as a benchmark standard for locally produced and/or used assessment/diagnostic instruments within the Connexions Service. Agreed criteria should be linked to the 'Brief Analysis' profile and included in future mapping exercises (paras. 4.8 and 4.30).
- 5.15 Regular ongoing surveys of young people and practitioner views should be undertaken to ensure that actual barriers to progress in learning continue to be adequately reflected in the 'APIR' Framework dimension factors/headings (para. 4.31).

6. APPENDICES

Appendix A Project delivery plan

Appendix B Project key activity, aim, structure, personnel and tasks for achievement between January and March 2001

Appendix C Project evaluation strategy and outcomes

Appendix D Development potential – proposal for additional funding

Appendix E The Vision: features of proposed assessment and diagnosis Extranet

Appendix F Brief analysis of diagnostic instruments currently used in Lincolnshire with young people aged 13 – 19 years old

Appendix G Instruments mapped, collected and entered on CD-ROM

Appendix H Demonstration CD-ROM and Key CD-ROM Screens

Appendix I Instruments Mapped, Collected and Entered on Extranet and in Library

Appendix J Extranet Flowchart and Key Extranet Screens

Appendix K Project LCGS Website Briefing Updates

Appendix L Project Forward Planning, Evaluation and Review: April – Sept. 2001

Appendix M ‘APIR’ Framework Consultation Response

Appendix N ‘Confidentiality and Information Disclosure’ Conference Documents

Appendix O Data Sharing Protocol: Assessment and Diagnosis Criteria and Content

Appendix P Project Questions for Survey of Young People’s Views

Appendix Q Value Added

Appendix R List of all staff involved in the Connexions Pilot

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