

Commercial in Confidence



**Assessment Report**

**For**

**CMT SERVICES**

**On behalf of**



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## 1. Key Information

Assessment Type	ACCREDITATION REVIEW
Assessor's Decision	STANDARD MET
Assessor's Name	JENNIE DUNSE
Visit Date	22/05/2012 – 24/05/2012
Client Id	11899
Assessment Reference Number	12/0528

## 2. Organisation – Information, Introduction and Overview

CMT Services was founded approximately 17 years ago by a husband and wife team. The company was founded to offer 'business to business' consultancy services in Quality Assurance, Health and Safety and management, with a small amount of specialised training support. Demand for training in specialist areas such as fork lift driving led to considerable growth in this aspect of the company. CMT Services (CMT) became a learndirect provider some 10 – 12 years ago, rapidly expanding from the original 2 training sites to 10 by 2012, with a further 2 sites in development. CMT is now the largest learndirect provider in the South West, and one of the 10 largest in the country. CMT now offers the full range of learndirect courses, and will be offering Apprenticeships from the summer of 2012. Through prudent management of finances and resources, CMT is able to offer vocational courses such as fork lift and industrial plant, and computer services, free of charge to learners undertaking learndirect courses. CMT operates across the South West, with a Head Office in Bridgwater, Somerset, and learning centres from Bristol to Penzance.

CMT started offering information, advice and guidance (IAG) to learners as many of those approaching CMT were misinformed or badly advised about industry requirements and opportunities. Alongside the development of learndirect courses, CMT developed its IAG services to provide impartial IAG both to learners undertaking courses and to clients eligible initially through next step, now through the National Careers Service, for which CMT is a sub-contractor to two prime contractors. IAG is provided through all CMT centres by a team of Advisers each covering a specified geographic area, supported by centre-based administrative and tutorial staff. Advisers also work in a wide range of outreach centres, such as Community Centres, and on partners' premises.

## 3. Added Value

In addition to assessing CMT against the **matrix** Standard, the effectiveness of partner relationships was evaluated, and the 'Blue Manual' of Quality Assurance was assessed.

Relationships with partners were found to be a strength of the organisation, bringing additional benefits to CMT, partners and clients. For example, CMT is required to work in partnership with a number of organisations, such as the Jobcentre and Working Links, who refer clients to CMT. CMT has worked hard to develop appropriate relationships with such organisations, and, where review indicated the relationship was not working as well as it could, has put improvements in place such as direct staff briefings and CMT staff working in partner premises. This has led to more appropriate referrals, and clients being better informed, with an understanding of what to expect before they start. Fewer clients now have to be referred back to the original organisation as inappropriate or ineligible, and completion and achievement rates for clients have risen even higher than before. In addition, CMT staff have developed wide networks of local providers so that clients can be referred quickly and

appropriately to additional or alternative provision. CMT Advisers, learning through the sharing of good practice with colleagues, have developed a range of appropriate partnerships with venues such as community centres and children's centres, enabling them to provide outreach services to clients who would otherwise not be able to access IAG services.

As CMT has grown, both in numbers and geographical spread, a range of working practices have arisen in different parts of the company as staff have responded to local situations. This had led to clients receiving a different experience in different centres, for example with centres developing "home made" posters to display key information to clients. In response, the CMT 'Blue Manual' brings together a range of company quality processes and procedures, from locking up of premises to version control. The Manual enables staff to have easy access to standard company procedures, providing a consistent experience for clients. Innovation is still encouraged, but improvements to procedures (for example, materials given to clients prior to arrival, or posters to be displayed in centres) are now submitted to senior managers for approval and tried out in a controlled way. If found to be effective, they are then adopted across the company, enabling good practice to be shared.

CMT may like to consider developing a more outcomes-based approach to the Blue Manual, rather than a process-driven approach. Organisations adopting an outcomes based approach report they have a clearer picture of the impact of each process on the service provided, and are able to pinpoint good practice and areas for improvement more easily. CMT may also like to consider developing the quality assurance of the IAG service through inclusion in the Blue Manual. Many of the components are in place, including observation of staff, monitoring of Action Plans, monitoring of client outcomes and client feedback and monitoring of case studies. Currently, these are not pulled together into a quality framework for IAG, which could enable CMT to improve IAG services even more effectively.

#### **4. Areas Not Yet Meeting the Standard**

There were no areas not yet meeting the Standard.

#### **5. Areas of Particular Strength**

CMT has clear policies on equality and diversity, confidentiality, impartiality, safeguarding and professional integrity which are effectively communicated and implemented by staff. Staff and clients interviewed consistently understood the policies and were able to explain how the policies applied to them. In particular, clients interviewed felt that CMT's staff actively role model policies such as equality and diversity. As a result, clients feel that they are respected and valued by CMT, and that their views are listened to. Some clients interviewed felt that their views had been changed during their time at CMT, and that they had learned to respect other people, whatever their circumstances or background. One client pointed to the equality and diversity statement on the wall and said:

*"Well, we should all be treated that way by any organisation, but it don't always happen. At CMT they listen, respect you, you're treated fairly, and they never push you in any direction – it's what you want. One or two of the other trainees, at the start their behaviour was really disrespectful to a couple of the others, they was soon picked up and our tutor talked through what was acceptable, what wasn't – and why. We all learned from that, and that's how it is here, treated with respect by everyone"*

Clients interviewed also commented on how careful staff are over confidentiality in open plan learning centres, which was not always their experience elsewhere. Staff interviewed were

very clear about impartiality and listening to what each client wants. As a result, clients reported that they feel in control of their own decisions, gain confidence in decision making themselves, and feel that they are achieving as much as they can. (1.3)

CMT has developed effective working relationships with a wide range of partners. These include contractual partners, those they are required to work with (for example by learndirect), providers offering a range of alternative learning options and support options, and organisations offering services to potential clients such as community centres and children's centres. For example, staff interviewed were aware of a wide range of local learning and support organisations in their area and were able to refer clients to the most appropriate agency quickly and easily. Clients interviewed appreciated being referred appropriately, having experienced in the past being 'sent from pillar to post' in search of the agency best able to meet their needs, which had been frustrating and dispiriting. Staff interviewed had learned from sharing information and good practice with colleagues, enabling them to keep up to date with provision in a fast changing market, and enabling them to develop new partnerships. For example, one Adviser had fed back on a successful partnership with a local children's centre, which had opened up access for potential National Careers Service clients who previously had no access to IAG or learning. Subsequently, colleagues had approached similar centres in their own areas, and were now offering IAG services on an outreach basis, leading to clients developing the confidence and awareness to take up learning opportunities.

CMT has put considerable effort into developing relationships with partners who refer clients to them. CMT aims to ensure clients are referred to them appropriately, that clients are eligible, and that clients know what to expect from CMT. This will support clients in enrolling on appropriate courses which they are likely to complete successfully. Where regular review has indicated that a relationship is not working as well as expected, for example too many inappropriate and/ or misinformed clients, CMT has addressed the issues with the partner to improve the situation. For example, it was identified that too many potential clients being referred by one Jobcentre were arriving with unrealistic expectations of immediately starting a vocational course without the basic skill levels needed to succeed. Now, CMT has a regular input into Jobcentre staff training, so that Jobcentre staff are aware of the requirements, and a CMT IAG Adviser has a weekly session based in the Jobcentre, available to potential clients. This has enabled potential clients to make an informed decision to apply to CMT for an appropriate course leading to a successful outcome, and for other potential clients to be referred by the IAG adviser to alternative providers more able to meet their needs. (1.8, 4.4)

CMT delivers IAG across a wide geographical area, approximately 160 miles from one end to the other. It would be easy for members of the IAG team to feel isolated and unsupported as a result, as they each have their own "patch" to cover. However, staff interviewed felt well supported, with good opportunities for development activities and for sharing good practice. All the Advisers interviewed felt very much part of a team, rather than being expected to manage their caseloads on their own. The opportunities for Advisers to learn through the regular sharing of good practice at team meetings and through e-mail are clearly leading to a more effective delivery. For example, the introduction of group sessions for clients by advisers on some aspects of job search such as CV development arose from sharing of good practice. Since the introduction of group sessions, referring agencies are reporting improved satisfaction in the standard of CVs, and clients attending group sessions are reporting they have developed the confidence and skills to produce an appropriate CV for themselves. In addition, staff time and skill is being used more effectively to deliver one session to 5-6 clients rather than individual sessions on the same topic to each client. Staff interviewed felt they had been able to develop new skills in group delivery, supported by undertaking a PTTLS qualification, which could also potentially lead to career development in the future. The consistent, embedded approach to staff development is leading to CMT

becoming a role model for a learning community rather than just being a learning provider. (2.4)

## **6. Areas for Continuous Improvement**

CMT uses an appropriate range of “hard” client outcomes to monitor and evaluate service delivery and identify improvements. “Softer” outcomes for clients are being monitored individually (for example, through sampling of Action Plans and observation of interventions). Staff interviewed identified a number of “softer” outcomes used to monitor and evaluate IAG delivery, including increased self confidence, increased motivation to learn and progress, better knowledge of the local labour market and training opportunities, and improved job search skills including confidence in developing a CV. CMT could explore how to define such outcomes (for example, using the National Careers Service offer of service) and how to capture and use them more effectively service wide to improve delivery further. Currently, CMT is consistently achieving very high retention, completion and achievement rates, well above awarding body averages, which is making it difficult to use such outcomes to identify improvements which will have an impact on service delivery. Extending the range of outcomes will enable CMT to see more clearly exactly what IAG is expected to achieve, and identify how successfully this is being delivered. (1.5, 4.2)

CMT could also consider to what extent clients are informed of improvements based on their feedback or comments. This is a useful way of encouraging clients to contribute to feedback as they can see their views are taken seriously. CMT may wish to extend the approach to include reporting back on client performance, including outcomes, and any improvements made as a result. This again can encourage and motivate clients to give their views and suggestions for improvement. (4.2, 4.3)

CMT provides good formal and informal training and development opportunities for IAG Advisers, but could explore extending IAG training for other staff involved in IAG delivery. Some administrative staff, for example, who are “first point of contact” for all incoming enquiries hold NVQ IAG qualifications, but this is not consistent across the company. Tutors and Centre Managers are also involved in IAG delivery in day to day contacts with clients, and could potentially benefit from training, including in-house training. Not only could this support further service improvement, it could provide CMT with a pool of skilled and knowledgeable staff available to take up progression opportunities as they arise. (2.3, 2.4)

CMT is clearly committed to continuous improvement, with many examples provided of improvements introduced as the result of review and evaluation activities. CMT could consider how to improve further the evaluation of the impact of improvements, based on setting clear objectives for the improvement, with anticipated outcomes. This does not have to be a formal, onerous process, where the improvement is a simple one (for example a change in working patterns to accommodate local bus times), but can help CMT analyse the impact of improvements and identify good practice to be shared with others. This can also help staff understand why changes are being introduced, and provide further opportunities to celebrate success. ((4.8)

## **7. Methodology**

A range of assessment methods were used, including:

- 1 one to one interview with Director
- 2 one to one interviews with 2 Managers
- 1 group interview with 2 senior Managers

- 3 group interviews with 6 staff
- 7 group interviews with 21 clients
- 1 telephone interview with staff
- 3 telephone interviews with partners
- 1 tour of Centre to view information and IT resources available to clients

## **8. Findings Against the matrix Standard**

### **1. Leadership and Management**

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

CMT has a clear Statement of Services which lays out the aims for the IAG service:

*CMT Services offers information, advice and guidance which aims to ensure that individuals can make informed decisions about their futures and meet achievable goals. Future employment prospects are improved by helping people to gain various qualifications (through a number of nationally recognised awarding bodies)*

As a National Careers Service provider, CMT also subscribes to the National Careers Service “offer”, aiming to deliver IAG services as defined by the National Careers Service.

Staff interviewed confirmed that they understood what CMT was aiming to achieve through IAG. They were able to explain how objectives for the service centre on clients undertaking and achieving learning opportunities appropriate to their needs, measured for example by retention, completion and achievement rates, and developing employability skills (including job search skills). Clients interviewed typically described the aim of the IAG they received as “helping me make the right decisions for my future”, “helping me find out where I want to go, and how to get there”, and “improving my chances of getting a job, learning how to do a good CV, how to do well in interviews”.

Staff were able to make the link between the aims of the IAG service and supporting the company’s mission of

*..... providing high quality training which is meaningful and valuable to all individuals. This can help to raise educational standards, improve individual ability, knowledge and potential, thus paving the way for brighter futures.*

Staff interviewed explained how IAG is viewed as contributing to the achievement of “meaningful and valuable” training, by helping clients make informed decisions on appropriate learning opportunities. IAG is also seen as supporting clients in raising their aspirations (and therefore their standards), and improving their ability, knowledge and potential by opening up realistic options, developing confidence and employability.

CMT is still run by the two founding Directors, supported by a small management team. The Directors have a clear company vision and ethos, which is communicated to staff by regular personal contact and visits, supplemented by regular company Newsletters and e-mails. Staff interviewed felt they were clear about what the company is trying to achieve, and how the company is performing. Staff interviewed appreciated the culture of positive achievement and praise, for example the weekly “prizes” of virtual flowers or chocolates for outstanding performance. As a result, staff interviewed felt that they have a clear picture at all times of what is working well, and what needs improvement.

CMT has clear policies on equality and diversity, impartiality, confidentiality and professional integrity. These are displayed as straightforward statements in Centres, and clients

interviewed confirmed that policies are explained to them during their induction, and at appropriate times throughout their time with CMT. Clients interviewed felt the way CMT staff behaved towards each other and to clients was exemplary, and demonstrated how the policies were embedded into practice. For example, as well as demonstrating respect and fairness to colleagues and staff, clients described how CMT staff were careful to protect confidentiality at all times. Staff work stations in open plan Centres were carefully placed so that computer screens and paperwork were not visible to passers-by, and telephone and personal conversations which were moving to potentially confidential discussions were moved to areas where they could not be overheard. Clients interviewed compared this behaviour favourably to other organisations they dealt with, particularly whilst unemployed. Clients felt their own behaviour had been improved as a result of the way they had been treated, particularly the way they now listen to and respect the views of other people, whatever their background.

Staff interviewed were clear about the need for impartial IAG, explaining how clients were more likely to achieve a positive outcome and make progress if their needs and interests were met. Staff also described how they were consistently supported by their line manager and senior managers when they were occasionally put under pressure by other organisations to “influence” clients into taking up particular options, whether these were in the clients’ best interests or not. Staff explained how managers encouraged putting clients’ long term interests, and professional integrity, above perceived short term gain. This approach was credited by staff interviewed with supporting the long term growth and financial success of the company.

Senior staff take responsibility for ensuring the company is aware of new legislation which will impact on delivery, and for monitoring compliance with existing legislation. Managers use their own contacts, for example their prime contractors, to alert them to forthcoming changes in the education, training and IAG landscape, for example, and keep relevant government websites under continuous review. Updated policies are produced as needed and circulated to all staff, supported by discussion through team meetings. Staff interviewed felt confident that they were well prepared for legislative changes which could impact on their delivery such as developments in Apprenticeships, changes to the qualifications framework, and developments in discrimination legislation relating to age.

At company level, CMT looks to retention, completion and achievement outcomes to measure how well the IAG service is performing. These are clearly related to ensuring people make informed decisions and meet achievable goals. There is also a clear link to improving peoples’ future employment prospects by helping them gain qualifications. Currently, CMT is performing extremely well with completion and achievement rates, for example, consistently in excess of 95%. This compares very favourably with the national average figures obtained through learndirect. CMT has also identified progress into employment or further learning as indicators of success for IAG. At individual level, CMT looks at how well clients achieve the outcomes agreed with them at the beginning of their IAG journey, modified if necessary as they progress. These could include developing employability skills, developing confidence, or developing decision making skills. These are monitored by reviewing Action Plans and through Case Studies. Staff interviewed were clear about the client outcomes and how these are used to assess the impact of the IAG service, understanding the relevance of the outcomes to the aims of the service.

Most clients are referred to CMT by third parties: learndirect, National Careers Service and agencies including Jobcentres, Working Links, Prospects, Tomorrows People, and the Probation Service. CMT invests staff time in ensuring referring agencies are kept informed of the IAG service on offer, but feels no need to advertise directly as more than enough clients are already being referred to them. CMT produces a simple service outline for referring agencies to give to clients, or to send to clients once they have been referred.



Similarly, the CMT website is aimed at partners and employers rather than the general public. The website contains a straightforward statement of service, so that partners are reminded of the IAG service available to clients. By concentrating on promoting the service to referring agencies, CMT finds that they are dealing with eligible clients with an understanding of what to expect. This leads to an efficient use of staff time, and effective use of limited marketing resources.

IAG Advisers have also recently started to develop relationships with community centres, childrens centres and neighbourhood centres, following the example of a colleague. This has opened up access for potential clients, such as lone parents or parents struggling to re-enter employment and training. These were people who were previously unaware of the help and support available to them, who are now able to access IAG simply by the presence of an Adviser on a regular basis.

CMT also notes that a number of former clients recommend them to friends and family. Any such enquiries are again normally given the service outline, and a brief explanation of the service available. CMT Centres are mainly in town centre locations, with clear promotion of the "learndirect" logo and National Careers Service in the "shop front" windows. This results in a small number of clients dropping in, who are also given the service outline. Overall, however, the most effective promotional strategy is the targeting of other agencies.

Staff interviewed felt that they were encouraged to contribute to the development of the service. One commented:

*"IAG delivery is very flexible. We know what we're trying to achieve, and what we have to deliver, but within that it's your responsibility – it's your area, your network, your clients"*

Staff interviewed felt that the responsibility they are given contributes to the overall success of the service in achieving client outcomes, as the service takes account of the needs of clients.

Clients interviewed felt that their views were listened to, and taken on board. Clients reported that they were always being encouraged to comment on the service, and some were aware of changes that had been made. For example, comments on the availability of an Adviser had led to changes in the Adviser's timetable, which now took account of local bus times. This made the Adviser more accessible. Clients interviewed felt that, unlike some other agencies they dealt with, the service delivered by CMT was there to help them, rather than having to fulfil bureaucratic requirements.

As noted above, working in partnership with other organisations is a central policy for CMT. Staff and managers interviewed had a clear understanding of how work with partners brings mutual benefits to both sides, and to shared clients, a view echoed by the partners interviewed. For example, effective relationships with agencies such as Jobcentres and Working Links results in a steady supply of eligible clients for CMT. For the referring agencies, their clients receive IAG leading to improved basic skills, relevant vocational qualifications, and improved employability skills such as CV writing and interview skills. These all enhance the client's employment prospects, and in some cases lead directly to employment.

Staff interviewed were able to describe how they had set up and managed extensive local networks over a relatively short space of time. They explained how they had built up relationships with a range of other agencies and providers who were able to meet clients' additional needs. These included other training and education providers, and support agencies. This enabled easy referral of clients to appropriate organisations. Staff interviewed have also built relationships with a range of community based organisations. This has

provided CMT with a wider pool of eligible clients, and opened up access to IAG for people in often deprived areas.

## **2. Resources**

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

CMT provides a service across the South West, from Bristol to Penzance. Within the area, IAG staff have been allocated to specific areas, based around CMT learndirect Centres, to make the most efficient use of their expertise and time. Staff interviewed confirmed they organise their own caseloads to make the best use of the time available, particularly on the borders of their territory where they work in conjunction with a colleague. In addition to being provided with laptops and smart phones to keep them connected in outreach locations, IAG staff are able to make use of the well equipped facilities in CMT's learndirect Centres.

The current IAG team has developed over the last 18 months to 2 years, in response to growth through next step/ National Careers Service contracts. This has led to a re-structure, with an IAG Manager in place. Staff interviewed felt that the restructure had led to more flexibility, and a service more responsive to client demand. Regular team meetings offer opportunities to share good practice, leading to more efficient working practices. For example, following the example of one Adviser, staff have now started to deliver some sessions, such as CV development, to groups of clients. Not only has this made more efficient use of staff time, clients report they gain in confidence through group support, and partners are reporting an improvement in the CV skills of their clients attending the sessions.

Staff interviewed confirmed that their health, safety and welfare is considered at all times. As one of the Directors has a background in Health and Safety, staff interviewed felt there was an appropriate emphasis on risk awareness and staying safe in any location. As a result, both staff and clients interviewed felt safe and comfortable in their working environment.

Prudent financial management, including careful management of the premises policy, has meant that CMT has been able to offer additional services to clients free of charge. Thus, CMT is able to offer a range of vocational courses free of charge, for example, in fork lift and plant operations, in addition to learndirect courses. These have proved very attractive to potential clients, who have subsequently benefitted from IAG to identify and deal with additional training needs.

Staff and clients interviewed confirmed that most information used is from electronic sources. Staff explained how they used only "tried and trusted" websites, lists of which are displayed next to computers for client use. These include such websites as the National Careers Service, and websites recommended by their prime contractors. The two prime contractors also supply regular local labour market information updates, as do Jobcentres. Staff interviewed reported how reliable information sources and new developments (such as new courses coming on stream) are shared at regular team meetings and by e-mail.

CMT has a rigorous policy of controlling website access on all company computers, so that staff and clients are not able to access websites which have not been through an approval process. In addition, any printed information goes through an approval process, with a version control procedure so that staff are confident they are using the current version of any document. Regular visits to all Centres by the Directors and other senior staff keep all staff "on their toes" with regard to display or use of information. As a result, staff and clients interviewed were confident that information provided was current, accurate and inclusive.

CMT requires all IAG Advisers to be qualified to NVQ level 4 in Information, Advice and Guidance. All Advisers currently are qualified, or working towards the qualification. In addition, having identified that Advisers were increasingly delivering IAG in group sessions,

CMT identified the PTTLs qualification as appropriate for Advisers, and again all now hold the qualification or are working towards it. Staff interviewed confirmed they feel more confident in delivering group sessions as a result, and that they have a wider range of skills to draw on when delivering the service, such as preparing for, delivering and evaluating learning to groups.

Administrative staff in some centres also hold appropriate IAG qualifications, and take on a more pro-active role in dealing with drop in clients coming through the door, or telephone enquiries, and initial contacts with referred clients.

Staff interviewed confirmed that they are consistently encouraged to learn and to develop new skills and knowledge. Each Adviser has a bi-monthly review with the IAG Manager, which offers a structured opportunity to discuss any training or development needs, but staff interviewed felt there was open communication at all time which facilitated their development. Staff were able to provide many examples of informal learning opportunities, such as sharing good practice or learning from colleagues, as well as following required training such as NVQ or PTTLs. Staff interviewed felt that if a learning opportunity offered a benefit to the individual and to the service, it would be supported. This included the provision of funding and time away from the workplace. However, the greatest input to learning and development was identified as the culture of the organisation, which was consistently described as “encouraging”, “positive” and “motivational”.

Staff interviewed were aware of career opportunities within and outwith the company, and some staff interviewed had themselves progressed into more senior roles. Many staff interviewed, however, were more interested in developing their role at their level, “progressing sideways” as one person said. They wanted to develop their expertise and skills in order to further improve the service to clients, and felt well supported by the company in achieving their own learning goals. Staff interviewed identified having a skilled workforce as a major factor in enabling clients to achieve positive outcomes.

A number of staff who had been recently appointed were interviewed, and a small number of staff who had recently taken on new roles within the company. All confirmed they had experienced a carefully structured induction which prepared them well for their role. This included topics common to all roles, and topics specific to them. Where possible, newly appointed staff were also able to shadow a more experienced colleague. All commented that they had felt confident that they had the basic skills, knowledge and expertise for their role before they were expected to become operational.

### **3. Service Delivery**

#### *The way in which the service is delivered effectively*

All clients visiting CMT attend an introductory session, during which the service is explained. This supplements the simple statement of service given or sent to clients prior to their first meeting. Clients interviewed confirmed the service had been carefully explained in terms they understood. They typically described the service as being there to help them make choices about their future goals, and how they might achieve them. Clients interviewed felt that the service consistently delivered what they were expecting. Staff interviewed described how they took clients through what the service could offer, checking that clients understood at each stage. Staff felt that if there was any misunderstanding this would quickly become clear, and could be rectified on the spot.

Staff and managers interviewed explained how client feedback, Action Plan reviews, case studies and client outcomes demonstrate that clients are making informed decisions about their futures, and that they are meeting achievable goals. These include completing and achieving learning goals, and developing employability skills. In addition, individual clients

interviewed confirmed how they were helped to make appropriate long term decisions, which some found challenging, and supported in identifying and achieving the small steps they needed to achieve their long term goal. For example, one client commented:

*“I found my Adviser a breath of fresh air. I was redundant after 30 years in the same industry. She helped me look at what I really wanted to do with my life, not just the same old stuff, and understand what jobs are out there now. Now I know I’m on course for the right job for me, not just any old job, and I can see how I can get there. Being redundant really knocks you back, but I’m achieving small steps all the time here, and it’s boosting my confidence right back up.”*

Staff interviewed were able to describe how the service is delivered to meet the needs of clients, and confirmed that there is no pressure from the learndirect team within CMT to recruit clients onto courses. Managers confirmed that client outcomes and reviews of Action Plans demonstrate there is no bias towards in-house provision. In addition, both of CMT’s National Careers Service prime contractors regularly review destination data, and would quickly raise any issues relating to impartiality. This was confirmed by the prime contractors themselves, who confirmed their monitoring activity indicated IAG was being provided impartially.

Clients interviewed understood the service was impartial, but some were still surprised when other providers were suggested to them. They had encountered providers previously who claimed to be unbiased, but who only discussed their own provision even when there were more appropriate options available. Clients were confident this was not the case with CMT, as their experience demonstrated options meeting their needs and interests were discussed, without limitation.

Clients interviewed felt that options were presented to them and discussed with them in ways they understood. They confirmed they had been helped to look at the consequences of choosing different options, and supported in making sometimes difficult but pragmatic decisions. For example, where public transport is limited, they were helped to consider options which were accessible. Clients consistently confirmed they felt in control of making their own decisions, with support where necessary. Clients felt this helped them develop confidence in themselves, and a better understanding of how to take difficult decisions in the future.

Staff interviewed explained how they ensure clients understand the choices they have, and the consequences of each choice. For example, for some clients, this can mean a lot of discussion and explanation, others prefer different approaches such as a diagrammatic explanation. Staff confirmed they are careful to ensure clients understand they must take decisions for themselves, and do not become reliant on their Adviser. For some clients this is challenging, as in many aspects of their life decisions on where to go, who to see and what to do may be prescribed for them. Staff explained how they break decisions down into very small steps, if necessary, giving positive encouragement to increase the confidence of clients as each step is overcome.

As a learndirect provider, CMT is based around a technology led approach. In addition to use IT based resources to provide current information, CMT’s Advisers use laptops to record client’s options, choices, progress and achievements. Advisers also use their laptops in outreach locations to connect to web enabled resources. This enables efficient delivery, and ensures staff and clients can access accurate and current information from any location. Clients are given the choice of how to communicate with their Adviser for support between sessions. Many choose text messaging for cost reasons. Clients without an e-mail account are provided with one, and supported in its use, to improve easy communication as well as their IT skills. CMT is keeping the use of social networking under review. Currently, social

networking sites are not accessible from CMT computers, as experience had shown they are a tempting distraction to both staff and clients, but the Directors regularly review the potential impact of developing social networking on service delivery.

Both staff and clients interviewed provided examples of how clients had benefitted from signposting or referral to other agencies. These included help to secure funding for further training, support with issues such as housing or debt issues, or referral to provision more appropriate to the client's needs. For example, one client commented:

*"I needed a higher level computer course than they could offer me here, so they referred me to another provider who could deliver what I needed – and my Adviser gave me contacts to sort out some funding for the course, which has really helped. Couldn't have asked for a better service"*

Staff interviewed confirmed that referrals are followed up, to ensure the referral has been effective for the client. Partners interviewed were able to confirm that referrals are appropriate and are followed up to ensure they have been of benefit to the client, for example that the client has now enrolled on an appropriate course.

#### **4. Continuous Quality Improvement**

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

CMT senior managers and managers regularly review performance against a range of appropriate objectives, including take up and achievement of learning opportunities, and development of employability skills (measured through achievement of modules on the employability course run by CMT). These are reviewed at service level and by individual staff member. The results are shared with staff through regular individual reviews and team meetings, where potential improvements are discussed. For example, one person delivering group sessions on CV skills was achieving better results than colleagues. CMT has now introduced group sessions across the company, with appropriate training for staff, and results have improved across the board.

CMT also reviews client outcomes from service delivery on a regular basis. These are mainly "hard" outcomes, including client retention, completion and achievement rates. CMT has consistently achieved outcomes well above average for each vocational area. CMT also uses entry into employment or further training as an indicator of success, gaining information directly through clients (many return to share their success with CMT), including follow up activities, from prime contractors and from referring agencies such as Jobcentres and Working Links. Outcomes are reviewed by managers, and again shared with staff through team meetings and the company Newsletter. Following review of entry to employment outcomes, the introduction of an IAG-led employability "package" has had some impact on positive outcomes for clients in what is a challenging economic environment. At individual level, CMT reviews client progress against the objectives agreed with each client at the start of their journey through sampling of Action Plans, using the results as a focus for discussion in the regular review with each adviser. This has led to additional development, for example, including shadowing of a more experienced colleague. Subsequent reviews of the Adviser's Action Plans showed an improvement in achievement of client objectives.

Contractually, CMT has to gather feedback from clients at prescribed intervals, using the prime contractors' preferred formats. This provides useful structured feedback which is regularly reviewed to highlight any improvements required. However, CMT is continually seeking feedback beyond contractual requirements. Clients interviewed confirmed they are consistently asked for their views on how the service could be improved, and were aware of adjustments made to delivery in response to their comments. Clients confirmed they were also consistently asked for their satisfaction levels. Clients interviewed were aware of how to

complain about any aspect of their experience at CMT, often referring to the clear statements displayed in Centres as a reminder. Staff interviewed explained how any complaint is carefully investigated, often involving another agency. For example, a number of clients referred from a Jobcentre commented that they had little information on CMT prior to arrival and were not sure what to expect. The Centre Manager worked with the Jobcentre and now has regular input to Jobcentre staff update meetings to ensure Jobcentre staff are aware of the services offered by CMT. Client feedback now indicates clients referred from the Jobcentre feel well informed and know what to expect prior to arriving at CMT.

CMT managers confirmed they meet partners regularly to look at what is working well, and what could be improved. Partners interviewed confirmed that there is an open, two-way dialogue with CMT at all times, not just during reviews, and that CMT welcomed suggestions for improvement. Reviews included analysis of the impact on clients, including client progress and outcomes. For example, the development of partnerships with community based centres is not only enabling new clients to access IAG, the centres are reporting that clients have raised aspirations and confidence, and are embarking on appropriate learning opportunities such as basic skills and employability. This in turn is helping the centres to demonstrate additional impact to their funding bodies.

CMT has a Quality Assurance manual, generally known as the “Blue Manual” which describes quality assurance policies, processes and procedures. The manual was developed in consultation with staff, those interviewed confirming they were aware of the Manual and knew how to access it to check requirements. Quality is also assessed through regular review of impact measures including client outcomes and feedback. IAG Advisers are observed delivering IAG by their manager, and by a representative of each of the prime contractors, who see this as an important element in quality assurance. One of the National Careers Service prime contractors commented:

*“CMT base their quality assurance strategy in the customer experience, ensuring the experience is right for each customer. I am sure they have robust Quality assurance in place, and I’m comfortable that they will take any actions necessary to improve quality”*

Staff and managers interviewed confirmed there is a staff appraisal system in place within CMT, with individual objectives related to service aims and objectives, including targets and client outcome measures. This is formally reviewed annually. Staff also confirmed they have a bi-monthly review with the IAG Manager, during which performance to date against objectives is discussed, achievements celebrated and any areas for improvement addressed. Staff also felt they could approach their manager at any time to discuss an issue they were unsure of, or to seek support or advice, which was readily given. Staff interviewed referred to the bi monthly team meetings as an opportunity to review service performance, share good practice, and ask colleagues for advice in resolving issues or improving performance. Staff consistently stressed the positive nature of appraisal and review activities, which they felt encouraged open debate. It was felt this resulted in improvements being sought and implemented, rather than criticism and blame being apportioned.

As a technology-led learning provider, CMT has made effective use of technology to improve the service. Advisers are now able to deliver a consistent service to clients, for example, whatever the location, supported by laptops and smart phones. Providing all clients with an e-mail address (which they can access from any public access computer, including libraries and community centres) means that clients can keep in contact with their Adviser easily, raising queries or requesting information for example. Clients interviewed confirmed Advisers respond speedily, often obviating the need for a meeting, which results in a more efficient use of Adviser time. Even the development of virtual “prizes” internally has enabled good performance and good practice to be shared effectively, staff interviewed commenting

that they take more notice of the virtual flowers, chocolates and other “rewards” (and what has prompted them) than they previously did of circulated “good practice examples”.

CMT has clearly adopted a ‘plan, do, review’ approach, with many examples of improved services arising from review of aims, objectives, feedback and outcomes. Improvement activities also include ensuring good performance is maintained, or improved even further. This approach was consistently understood and applied by staff interviewed across all roles, and was appreciated by clients interviewed and by partners. One client summed up the approach by commenting:

*“I’ve had contact with lots of different places over the years, they all say they are ‘committed to improvement’. Well, I can tell you, here at CMT they mean it, it’s in their blood. For us, it means we are confident we’ll achieve what we set out to do with them, we’ll improve too – our confidence, our skills, whatever. Make sure you tell them – they’ve changed my life, they are the best thing that’s happened to me – outside of my child being born.”*

## 9. The matrix Standard Evidence Grid

Criteria	Met	Not Met	Strength	AfCI
1.1	x			
1.2	x			
1.3	x		x	
1.4	x			
1.5	x			x
1.6	x			
1.7	x			
1.8	x		x	
2.1	x			
2.2	x			
2.3	x			x
2.4	x		x	x
2.5	x			
3.1	x			
3.2	x			
3.3	x			
3.4	x			
3.5	x			
3.6	x			
4.1	x			
4.2	x			x
4.3	x			x
4.4	x		x	
4.5	x			
4.6	x			
4.7	x			
4.8	x			

## 10. Conclusion

CMT Services has demonstrated that that it continues to meet the **matrix** Standard. CMT Services is a well-established company which has grown from a small consultancy business to one of the 10 biggest learndirect providers in the country. The IAG service has developed alongside, ensuring clients make informed decisions about their futures and follow appropriate learning opportunities to help them realise their plans and enhance their employment prospects.

From the start, CMT's focus has been on meeting the needs of clients, initially businesses seeking advice and support on quality assurance, now clients seeking information, advice and guidance on learning and work. CMT's Directors clearly set high standards of



professional integrity, which are understood and implemented by their staff. Their approach is resulting in clients achieving outcomes which will enhance their employment prospects. CMT has developed a strong reputation as a partner of choice for other organisations, based on a track record of achieving what it sets out to with clients. The commitment to continuously improving services in line with client needs should stand CMT in good stead for continued growth in the future.